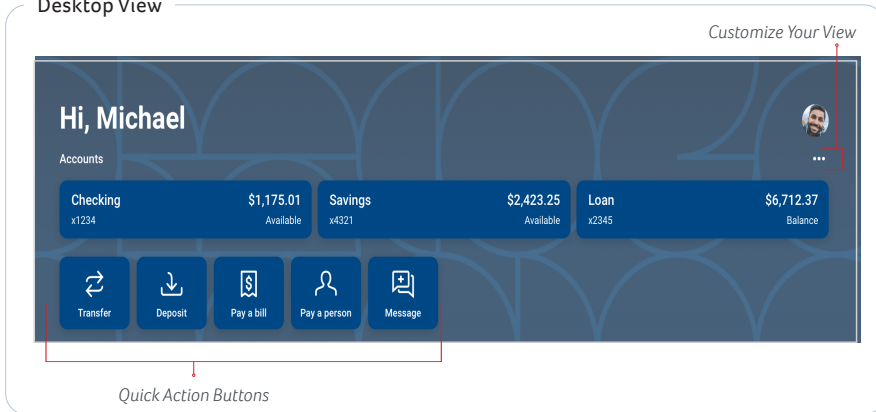




# QUICK REFERENCE GUIDE

These tips apply to both online banking and the new OSB mobile app.

## Desktop View



## CUSTOMIZE YOUR VIEW

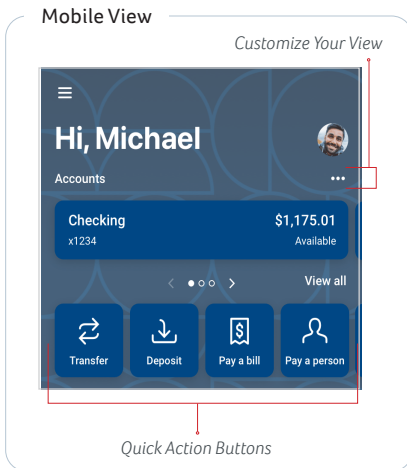
Tap the “...” in the upper right corner of any section to reorganize the dashboard layout and adjust the amount of information displayed in each section. Many of these features can also be accessed from the Menu in the upper left, or from the Quick Action buttons under the Accounts listing.

## ACCOUNTS

View your accounts and available balances. Flip through all your accounts by swiping the Accounts section left or right.

- Use the Quick Action buttons on the Dashboard to access features like transfers, paying a bill, paying a person, leaving a message, or making a mobile deposit.
- Press the account name for additional options, such as viewing transactions, making a deposit, viewing documents (e-statements) and setting alert preferences.

## Mobile View



## FREQUENTLY USED FEATURES

**Hint:** To locate Settings on your desktop, click your name at the bottom of the Menu.

### Add or Remove Accounts from Dashboard View

Menu > Settings > Oconee State Bank > Show in App / Show balance and activity

### Rename Accounts

Menu > Settings > Oconee State Bank > Rename

### Alerts

Choose an account from the Dashboard > Alert Preferences

### eStatements

Choose an account from the Dashboard > Documents

### Change User Name, Password, Passcode, Face/Touch ID or phone number for Two Factor Authentication

Menu > Settings > Security

### Add your Picture

Menu > Settings > Profile > Click the pencil next to the round image.

### Update your Email or Phone Number

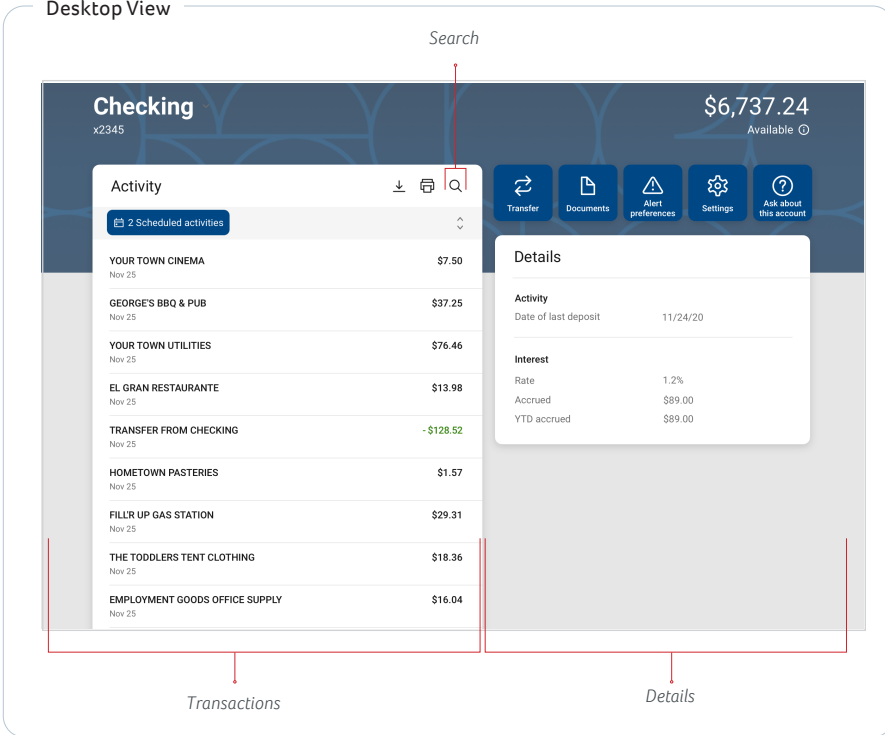
**DESKTOP**  
Menu > Settings > Profile > Click edit next to the information you wish to change.

### MOBILE

Menu > Settings > Select your name > Click edit next to the information you wish to change

# QUICK REFERENCE GUIDE (cont'd)

## Desktop View



## TRANSACTIONS

View transactions across all your accounts from the dashboard Transactions section. To view transactions for a single account, select the Account from the dashboard.

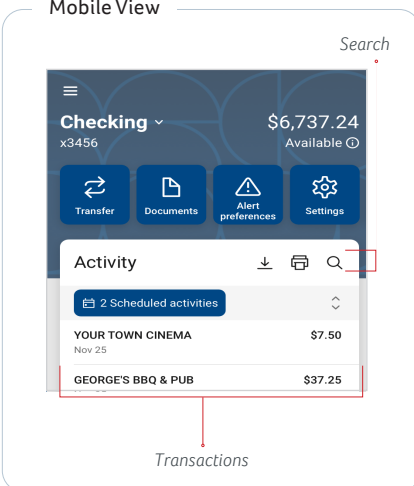
- Search for transactions by using the magnifying glass in the upper right of the Transactions section.
- Select any posted transaction to add a tag, note, or attach an image, such as a receipt.
- See additional transaction details by clicking on the specific transaction.

## PAYMENTS

Pay bills, pay a person, add payees, or just get an overview of your most recently made and scheduled payments.

- From your desktop, select Manage Payments in the Payments section to access comprehensive bill pay options, including editing or deleting payees or scheduled payments, managing recurring payments, and viewing payment history.

## Mobile View



## TRANSFERS

Move money between Oconee State Bank accounts or to accounts at other financial institutions.



## MESSAGES

Start a conversation with a Oconee State Bank representative during posted hours. You may also leave a message after hours and we'll respond the next business day.

## CARD MANAGEMENT

Turn debit and credit cards on or off, report them lost or stolen, activate a new card, add travel notices and activate other card controls.



## DEPOSIT CHECK (MOBILE APP ONLY)

Deposit a check right from your phone or tablet using the Deposit button on the Dashboard.