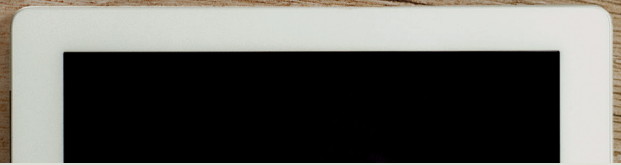


SYNC TOOLS GUIDE



..... *featuring*

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Sync Online



Sync Mobile

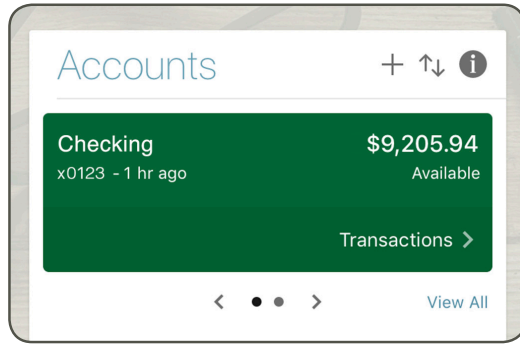


Member
FDIC

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Sync Mobile

Available Cards



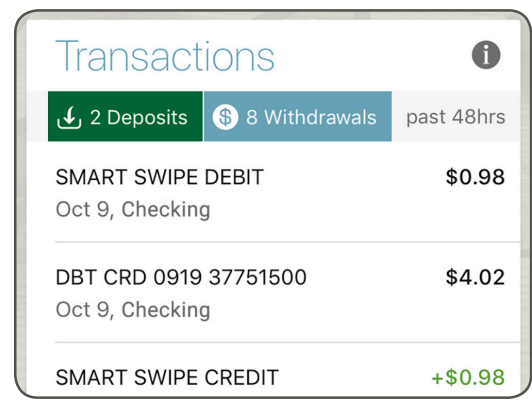
Tap the “i” in the upper right corner of any card to add, move, remove, or customize the cards that appear on your dashboard. Many of these features can also be accessed from the Menu in the upper left, or from the Quick Actions on the Accounts card.

Accounts – Keep up to date on all your account balances. Quickly flip through your accounts by swiping the balance card left or right.

- Add additional Bank Independent accounts, or accounts from other financial institutions by pressing the “+” button in the upper right corner of the card.
- Change the order in which accounts are listed by pressing the up and down arrows in the upper right of the card.
- **Upper half:** Press the account name for additional options such as depositing checks (Deposit), Documents (eStatements), and Debit Card controls (Manage Cards).
- **Lower Half** – use the transactions link underneath the account’s name to view transactions for the account. Click the magnifying glass in the upper right to search for a transaction. Select any posted transaction to add a tag, note, or attach an image.

Available Cards (cont.)

Transactions – From the dashboard, the Transactions card allows you to view transactions across all of your accounts in a single convenient list. If you prefer to view transactions one account at a time, use the Transactions link from the Accounts card.



Deposit Check – Deposit a check right from your phone or tablet.

Payments – Pay bills, add payees, or just get an overview of your most recently made payments.

Manage Cards – Turn your debit card on or off, report it lost or stolen, or activate your new card.

Messages – Display messages and alerts from Bank Independent right on your dashboard.

Transfer – Move money between Bank Independent accounts, or accounts at other institutions.

Recurring Transactions – Reveal common recurring transactions made at the same merchant to help you stay in control of your budget.

Frequently Used Features

Add or remove accounts from dashboard view:

Menu ▶ Settings ▶ Bank Independent ▶ Show in App / Show balance and activity

Rename accounts: Menu ▶ Settings ▶ Bank Independent ▶ Rename

Debit Card Controls: From the Manage Cards card on the dashboard, or from the Accounts card on the dashboard ▶ Press the account name ▶ Manage Cards

Alerts: Menu ▶ Settings ▶ Bank Independent ▶ Manage Alerts

eStatements: From the Accounts card on the dashboard ▶ Press the account name ▶ Documents

Change password, passcode, Face ID, Touch ID or Authy phone number: Menu ▶ Settings ▶ Security

Add your picture: Menu ▶ Settings ▶ Select your name ▶ Click the pencil next to the image.

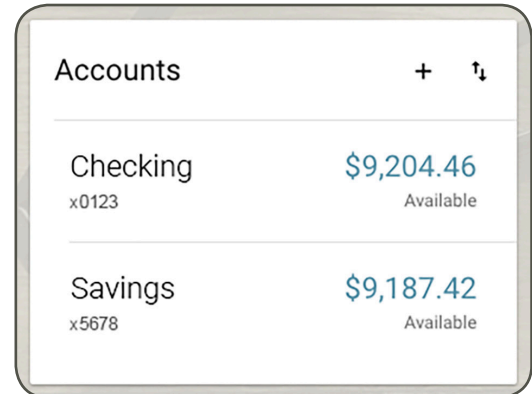


Sync Online

Available Cards

Accounts – Lists your accounts and available balances. If you have more than four accounts, use the arrows at the bottom of the card to view more.

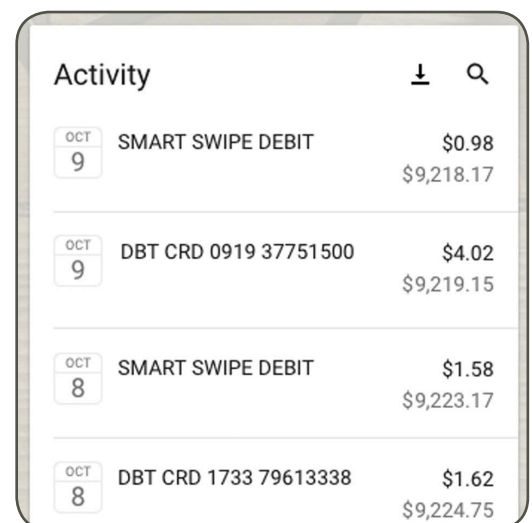
- Add additional Bank Independent accounts, or accounts from other financial institutions by pressing the “+” button in the upper right corner of the card.



- Change the order in which accounts are listed by pressing the up and down arrows in the upper right of the card.
- Choose any account from the Accounts card to see:

Activity

- Download transactions by clicking the down arrow in the upper right of the Activity card.
- Search for transactions by clicking the magnifying glass in the upper right of the Activity card
- Select any posted transaction to add a tag, note, or attach an image.



eStatements

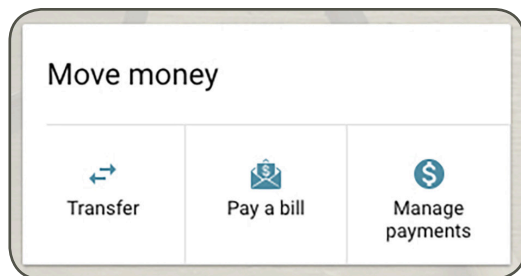
- Access your eStatements from the Documents link.

Cards

- Turn your debit card on or off, report it lost or stolen, or activate your new card.

Move Money

- Move money between Bank Independent accounts, or accounts at other institutions with the Transfer option
- Quickly pay bills and add payees from the Pay a Bill option.
- Select Manage Payments to access comprehensive bill pay options, including editing or deleting payees and scheduled payments, managing recurring payments, and viewing payment history.



Messages

- View alerts and messages from Bank Independent.

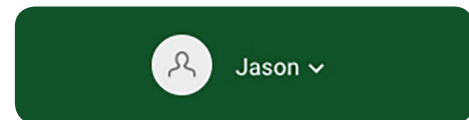
Activity

- View the dashboard Activity card to view transactions across all of your accounts in a single convenient list.
- Toggle Scheduled Activities at the top of your transaction list to view scheduled bill payments and transfers.

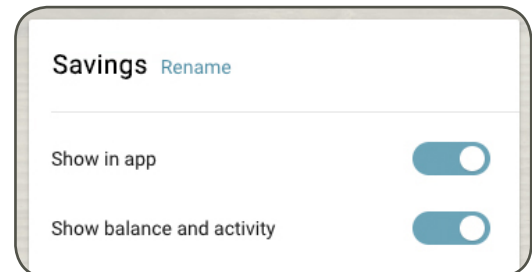
Frequently Used Features

eStatements: Choose an account from the dashboard ▶ Documents

Settings: Click your name in the upper right corner of any Online Banking screen.



- **Add your picture:** Settings ▶ Profile ▶ Click the pencil next to the round image.
- **Update your email or phone number:** Settings ▶ Profile ▶ Click edit next to the information you wish to change.
- **Change your user name, password, or Authy phone number:** Settings ▶ Security



- **Add or remove accounts from dashboard view:** Settings ▶ Bank Independent ▶ Show in App / Show balance and activity
- **Rename accounts:** Settings ▶ Bank Independent ▶ Rename
- **Debit Card Controls:** From the dashboard select an account, or Settings ▶ Bank Independent
- **Alerts:** Settings ▶ Bank Independent