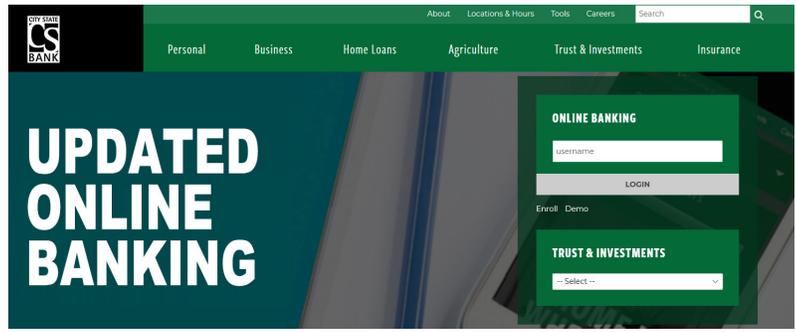




MEMBER FDIC

# ONLINE BANKING FAQ



## If I am a **CURRENT** Online Banking customer, how do I login to the Updated Online Banking for the first time?

- You will login as you normally do, by using your current login ID and your current password.
- From there, it will ask you how you would like to receive your Secure Access Code (SAC). Please choose the option you would like and enter the code in the space provided. This is based on the contact information that we have for you. If your contact information is not current, please call us at 515-981-4234 to update it.
- You will be prompted to change your password at this time.
- Then you will be asked if you would like to 'register' your device. If the device you are using is private (your personal computer, phone, tablet, etc.) you can register it to save time on future logins. We do not recommend registering a public device.

## If I am **NOT** a current Online Banking customer, but would like to be, how do I sign up?

- Go to [www.citystatebank.com](http://www.citystatebank.com). In the 'Online Banking' box on the top right, click 'Enroll'.



## How do I nickname my accounts?

- Go to 'My Account' | 'Account Preferences' then click on the account you would like to nickname. Choose 'Nickname Account' then enter the nickname (ex. House Account-Checking) then click on the green checkmark.

## How do I make a loan payment?

- From the home page, click on 'Transactions' then 'Make a Loan Payment'.

## How do I pay a friend?

- From the home page, click on 'Transactions' then 'Pay a Friend' | 'Send'.

## How do I link an account so that I can see all of my accounts, credit cards, investments, etc. (from any financial institution) at a glance and view my budget and spending in a Personal Financial Management tool?

- On the right part of the home screen, choose 'Link Account' in the green box or scroll further down on the page and select 'Link Account' there.

## How do I un-link an account from my Personal Financial Management?

- To un-link an account go to 'My Account' and choose 'Account Preferences' then click on the account you would like to unlink and click 'Remove'.

## How do I transfer money to a family member or close friend that also banks at City State Bank?

- Go to 'Transactions' and choose 'Pay CSB Account' then click on 'single transfer' (to make a onetime payment) or choose 'Link Account' (to deposit to someone that you regularly make payments to).

## How do I move money to and from my City State Bank accounts and my account at another financial institution?

- Click on 'New Features' and choose 'Add External Accounts'. This takes a few days to confirm. Once it is added, you can access the accounts by going to 'Transactions' | 'Transfer Funds'.

## How do I set up alerts on my accounts to tell me when my balance is at a certain amount?

- Go to 'My Account' and then select 'Alerts'. Click on 'New Alert' in the upper right corner to begin.

## How do I enroll in Text Banking so that I can receive current balances, account information, and transfer money via text?

- Go to 'New Features' | 'Text Enrollment' and click the 'Off' button so that it changes to 'On'.
- Enter your mobile number and click 'Agree to Terms'. Be sure to read the terms and choose 'Save' at the bottom of the page.
- Choose 'My Accounts | Account Preferences' which accounts you would like to enable for Text Banking and click 'Text Banking Off'.
- Choose 'SMS' | 'Text' and click 'SMS Text Enrollment' so that it says 'On'.

## How do I change or update my address or contact information?

- All account profile updates can be made at 'My Account' | 'Update Contact Info'.

## How do I change where I receive my Secure Access Code to log on to online banking?

- Go to 'My Account' | 'Login Preferences'.

## How do I change my Login or Password?

- For security reasons, it is a good idea to change your password periodically. To do so, go to 'My Account' | 'Login Preferences'.

## How do I sign up for e-statements?

- To go paperless and sign up for e-statements go to 'Statements' and click on 'E-Statement Enrollment'.

For additional help with online banking, feel free to contact City State Bank.