MISSION BANK

Online Banking

The Site Basics Guide

# Contents

Getting Started

New User Login

Welcome to Mission Bank! Our website is www.missionbank.bank.

New users to Online Banking will receive a setup email from Mission Bank containing a secure link for them to establish their login ID and create a password.

Users have seven days to select the link in the email and establish credentials, or the link becomes inactive.

After your user credentials are established, you will be prompted to complete the setup by activating up two-factor authentication (2FA):
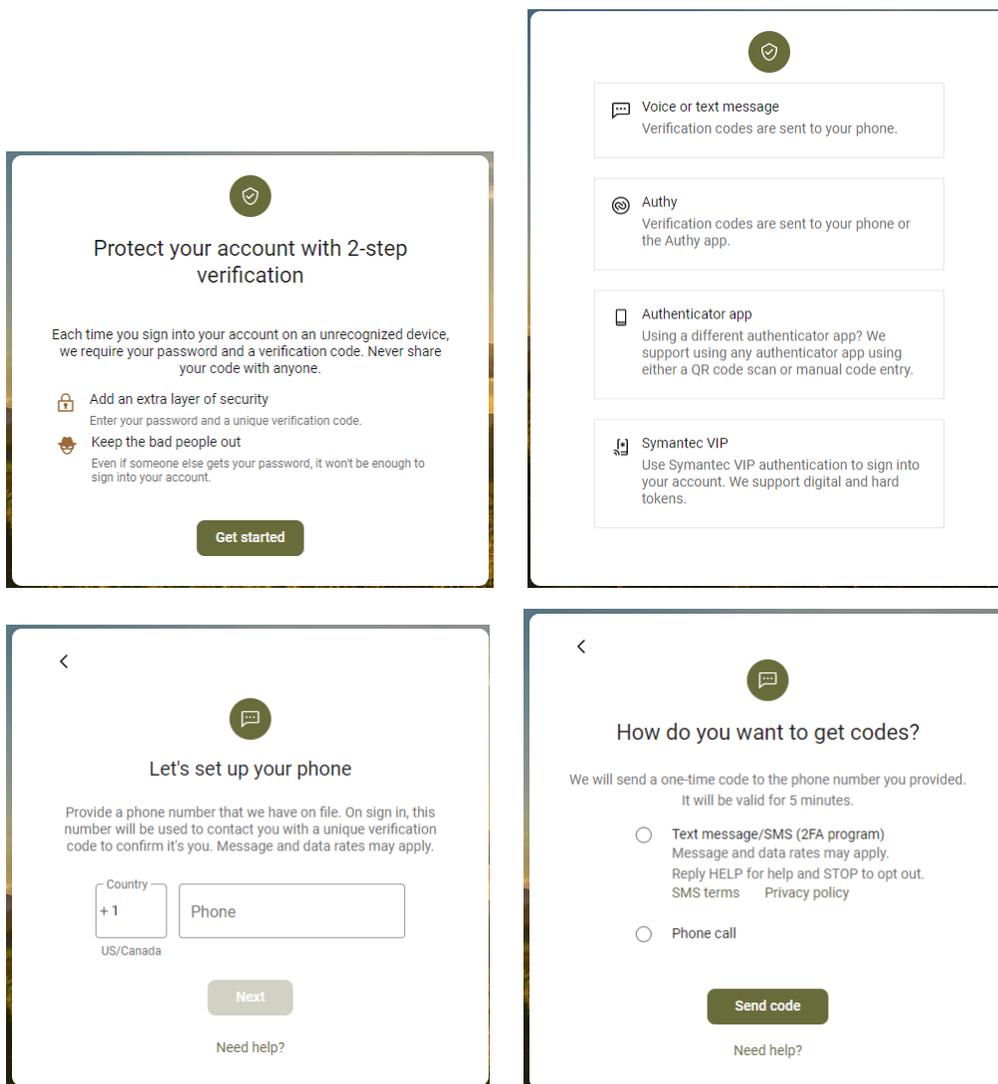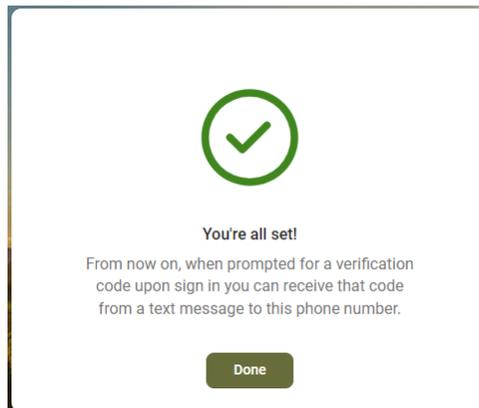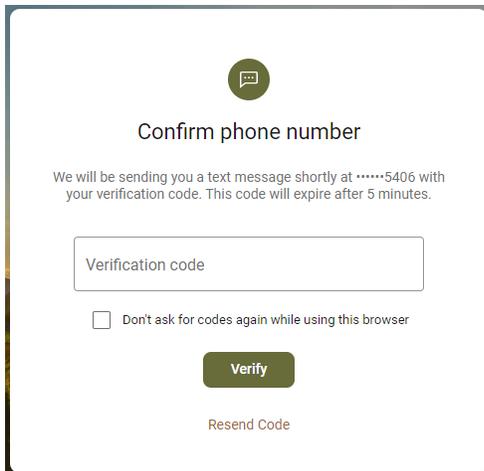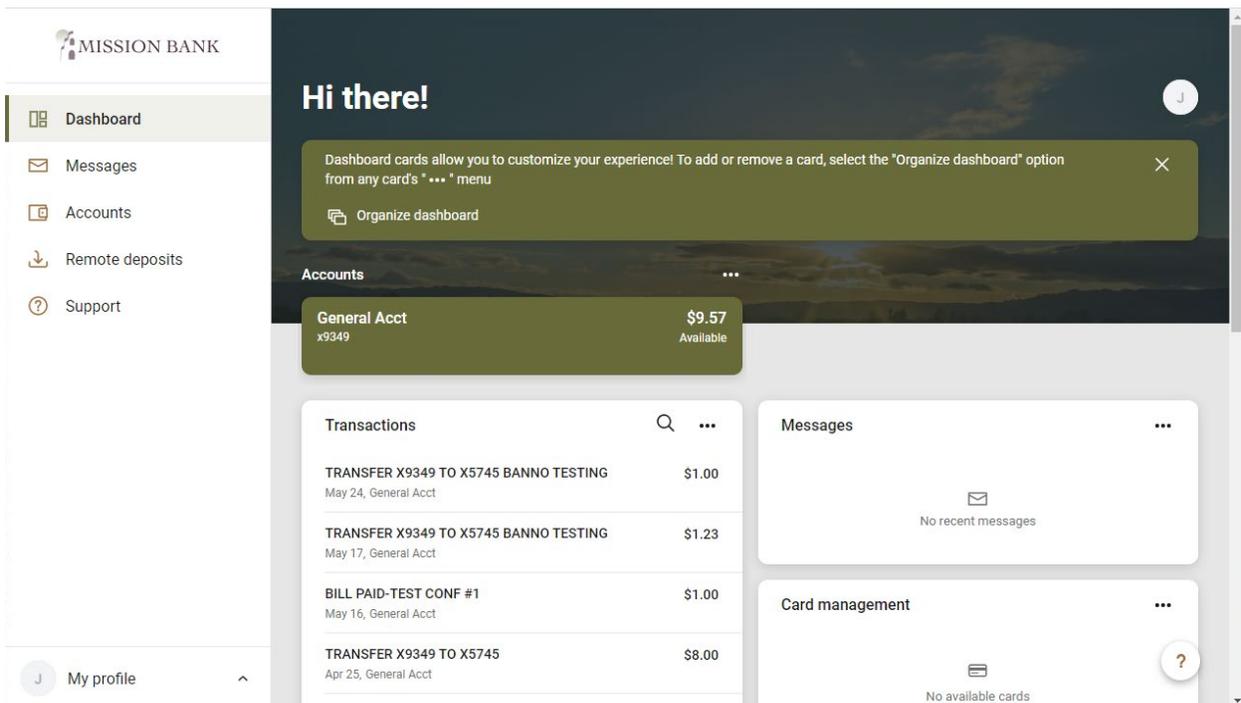
Site Overview

Dashboard

Each user can configure the dashboard according to their preferences.

The information is presented on cards and there are some additional editing options available by clicking ••• in the upper right corner of each card.
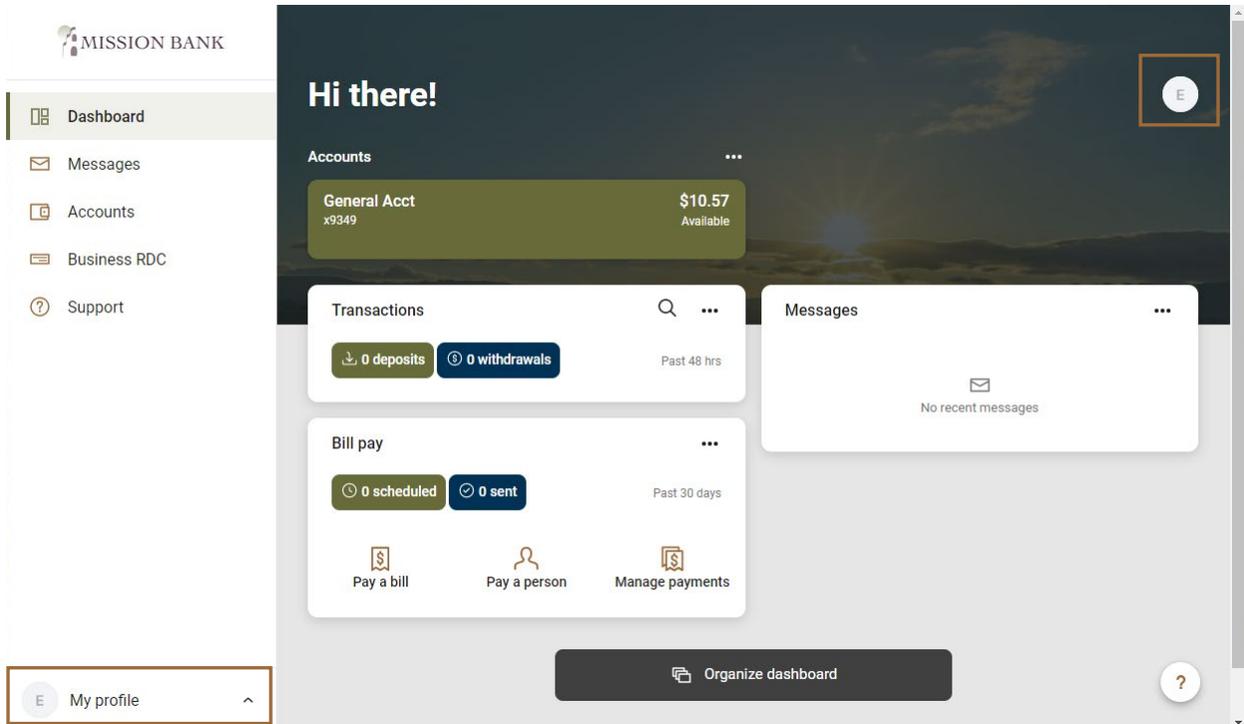
Settings

Please note: *To prevent unauthorized access, editing some of the settings will require the user to re-input their password for access.*
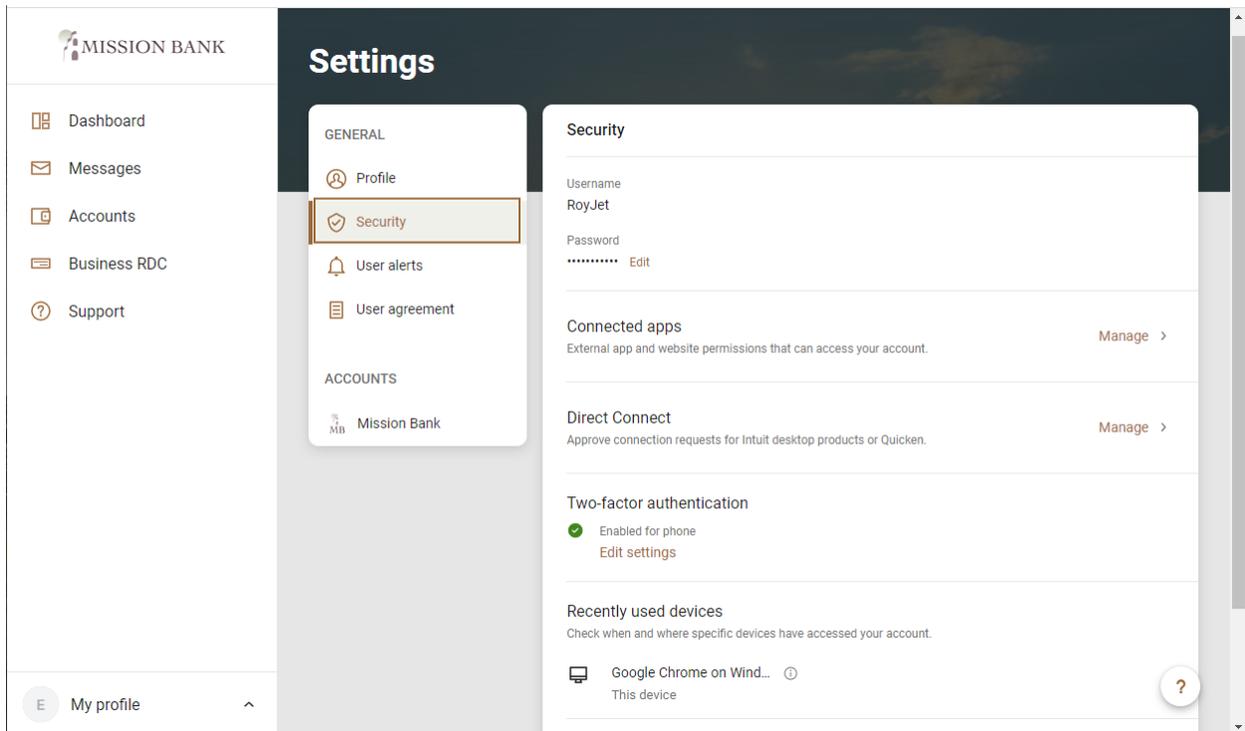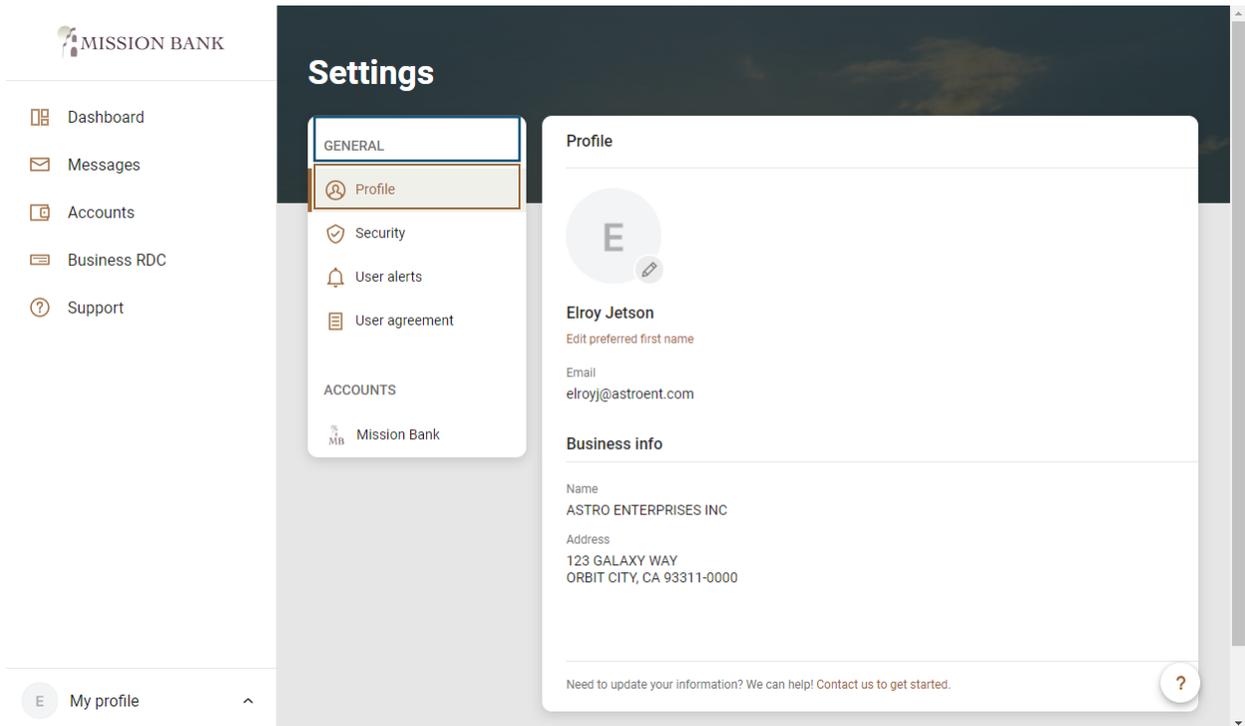
There are two types of settings in Online Banking – User Settings and Account Settings.
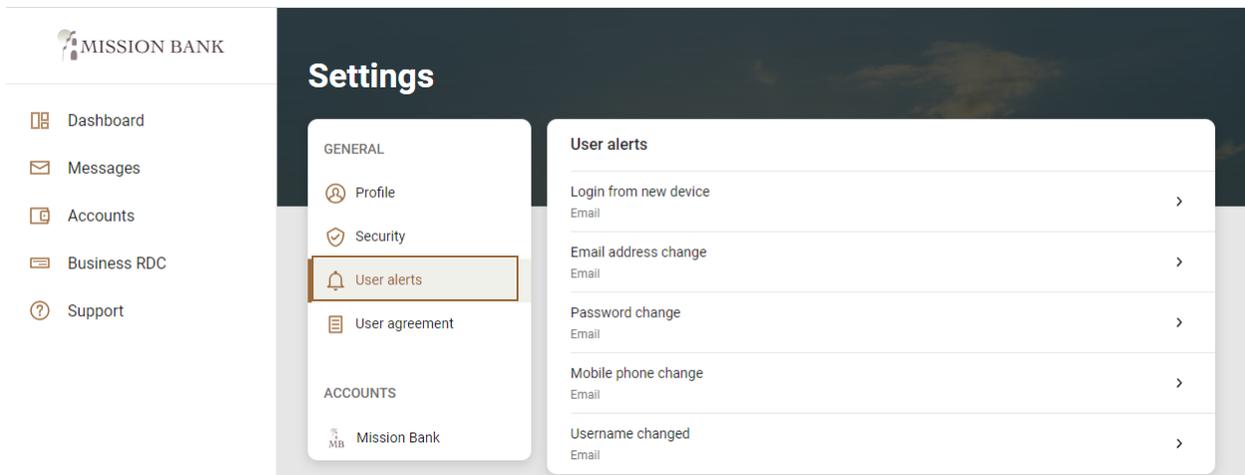
User Settings

User profile settings can be reached from two places on the dashboard – under the user icon in the upper right corner or at the bottom left corner under My Profile.

General settings apply to the user's personal information and preferences.
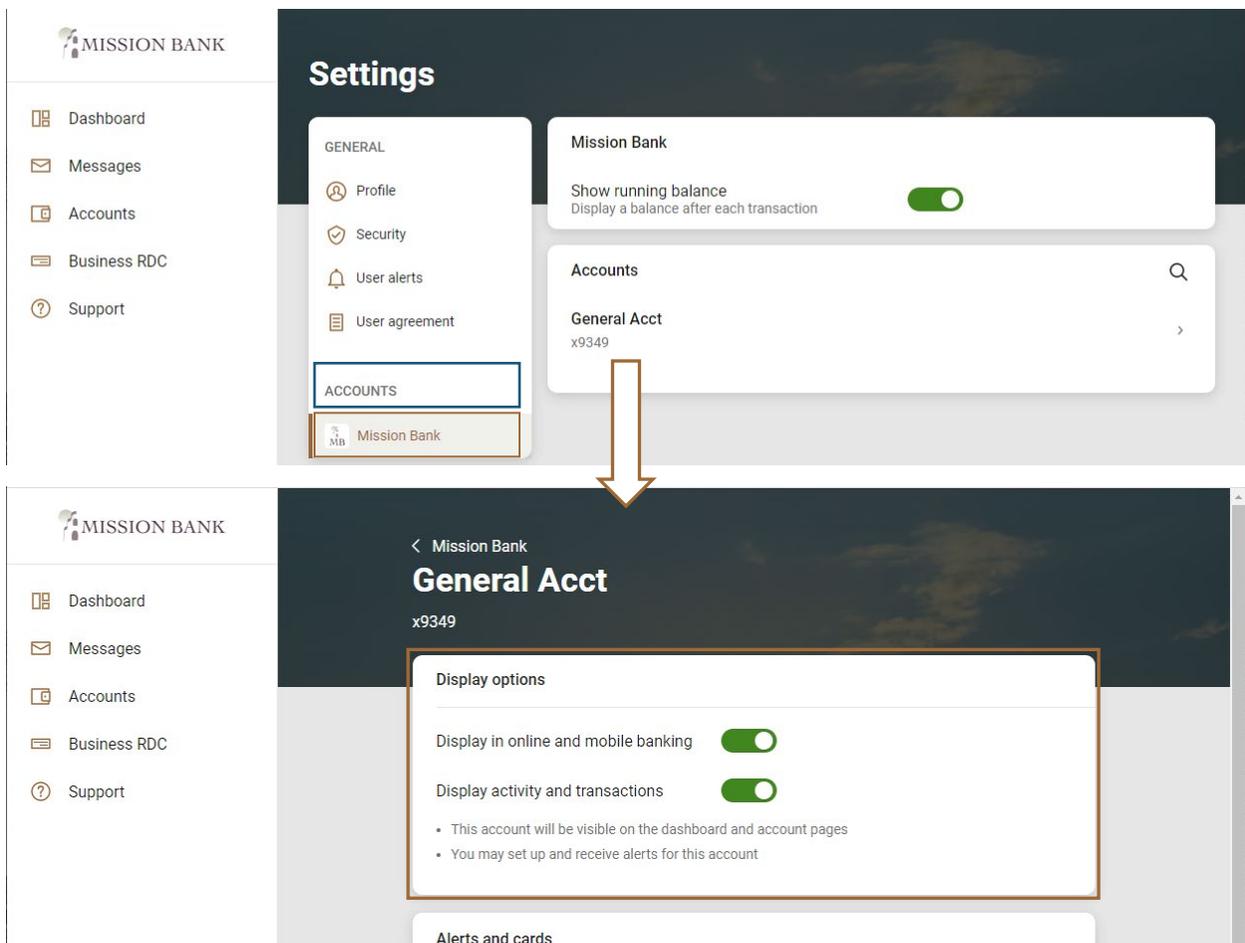

Please note: Direct Connect (shown above) establishes a connection from Online Banking to QuickBooks® or Quicken.
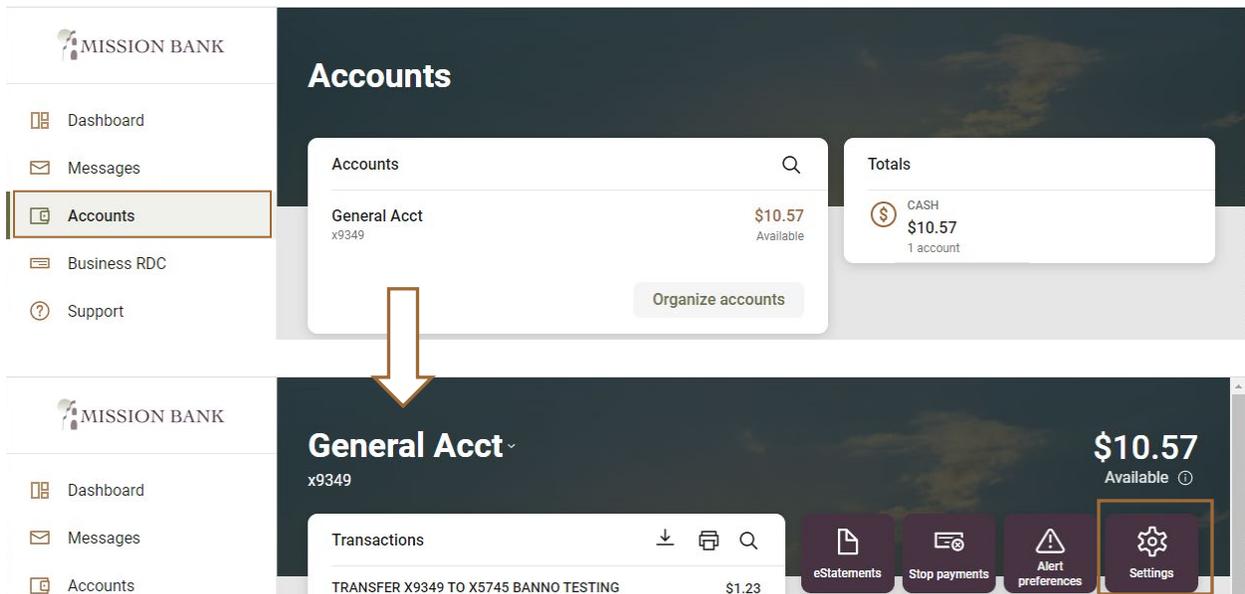
Account Settings

Account settings can be reached from either user **Settings,** or from the **Accounts** detail page on the menu panel.

There is also a settings button for each account on the account's detail screen:
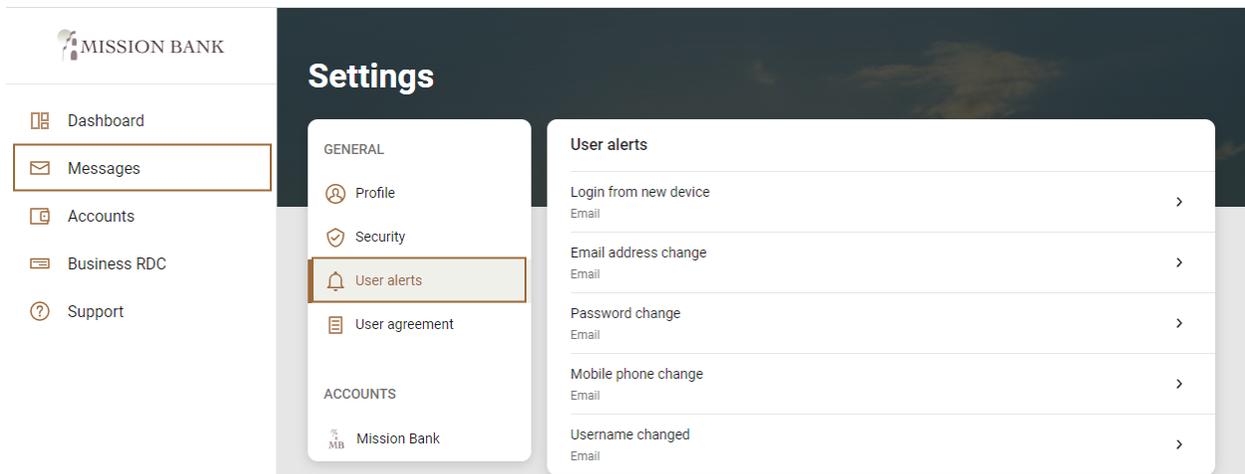

Alerts

Alerts are a very effective way of managing or monitoring certain activities. They are set up by individual users and the user has their choice of delivery methods for alerts: email, in-app message, or text message.

Similar to Settings above, there are two types of alerts in Online Banking – User Alerts and Account Alerts – and they are reached from the Settings pages.

User Alerts

The **User Alerts** shown below will always generate an email if a change is detected, and the user also has the option to receive the alerts via a text message or an in-app message, which appears under Messages on the menu panel.

Account Alerts

Account Alerts are set for each account and can monitor balance activity and/or transaction activity.

Alerts and cards

Balance   Transaction

You do not have any alerts saved.

Notify me when my balance is :

| over ⌄ | $ |

Notify by:

☐ Text   ☐ Email
elroyj@astroent.com   ☑ In-App Message

Cancel   Add alert

Alerts and cards

Balance   **Transaction**

You do not have any alerts saved.

Notify me when a

| Credit (deposit or earning) ⌄ |

is over:

| $ |

Notify by:

☐ Text   ☐ Email
elroyj@astroent.com   ☑ In-App Message

Cancel   Add alert