

# Achieva's Online Banking: Quick Reference Sheet



Achieva's online banking system provides our members with **GOOD** tools and options to manage their money and financial goals.

## Registration

### Online Banking Registration

1. Click **Register Now**
2. View the registration video or click Continue to Registration
3. Select your account type: **Individual** or **Business**
4. Review and agree with the Consumer and Business Digital Experience Agreement
5. Confirm your identity
6. Choose a method to receive a multifactor authentication code
7. Key in the code you have received and click Verify
8. Create your user ID and password
9. Confirm your time zone
10. Complete your profile or click View My Accounts

## Account setup/Customization

### Hiding/Un-hiding Accounts

1. Click the account image or silhouette located in the upper right-hand corner of the screen
2. Click **Settings**
3. In the settings menu, click the **Accounts**
4. Locate the account you wish to hide or unhide
5. Click the pencil to the right of the account
6. Make the changes, then click **Save**

### Linking to Another Bank Account

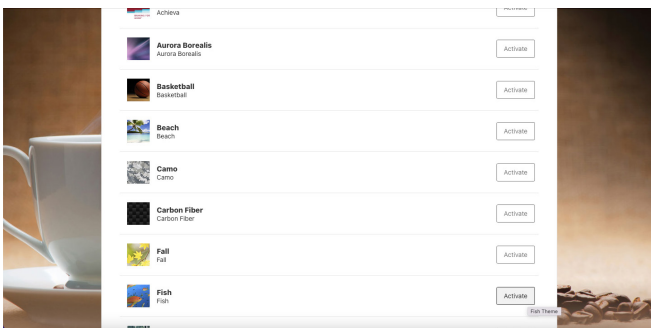
1. Access the Transfer & Pay menu
2. Click **Transfers**
3. Click **More Actions**
4. Click **Add Account**
5. Choose the type of account you would like to link: Another Achieva member's account or an external account. If external, choose how you would like to link it using the options below:
  - Another Achieva member's account** - Enter the member's last name or business name, account type (share or loan), member number, and share ID. If you intend to reuse this link, check "Save for future use" and nickname the account. Then, click **Save**.
  - **Instantly** - By sharing information about your external accounts online banking (if applicable)
  - **Manually** - By entering your Account information for the external account so we may send two (2) deposit transactions to the account. They may take up to three business days to appear in the transaction history. Once the deposits have been made, confirm the account by entering the two deposit amounts into Achieva's Online Banking.
6. Once linked, the account will appear in the applicable field when making a transfer of funds

## Nicknaming Accounts

1. Click the account image or silhouette located in the upper right-hand corner of the screen
2. Click **Settings**
3. In the settings menu, click the **Accounts**
4. Locate the account you wish to rename
5. Click the pencil to the right of the account
6. Nickname the account, then click **Save**

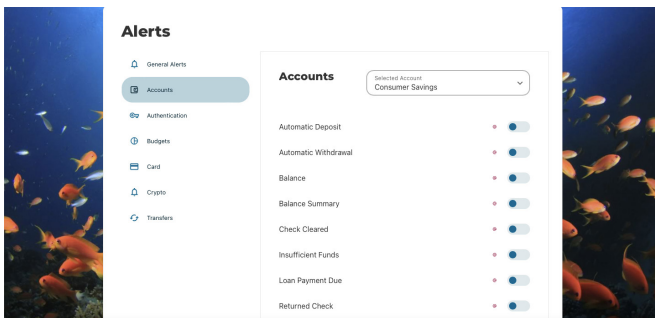
## Themed Backgrounds

1. Click the account image or silhouette located in the upper right-hand corner of the screen
2. Click **Settings**
3. In the settings menu, click the **Theme**
4. Select the **Activate** button next to the theme you wish to use



## Setting Up Alerts

1. Access the Tools menu
2. Click **Alerts**
3. Select the account you wish to set alerts for
4. Toggle the alert you wish to use and select settings if applicable. Then, select the method you wish to receive the alert.



## Transactions

### Bill Pay

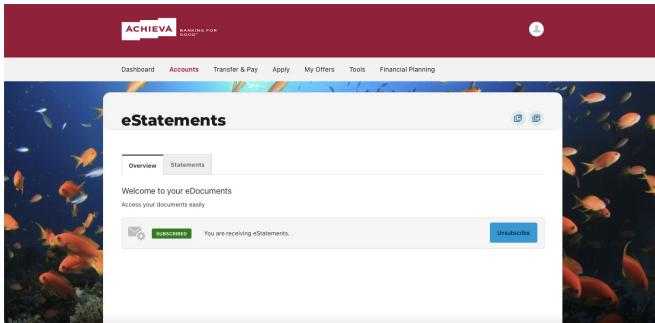
1. Access The Transfer & Pay menu
2. Click **Bill Pay**

## Check Reorder

1. Access the Tools menu
2. Click **Check Services**
3. Click **Reorder Checks**

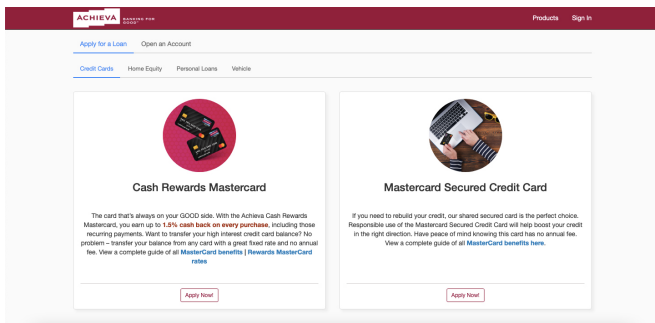
## E-statements

1. Access the Accounts menu
2. Click **E-statements**
3. Click **Statements**



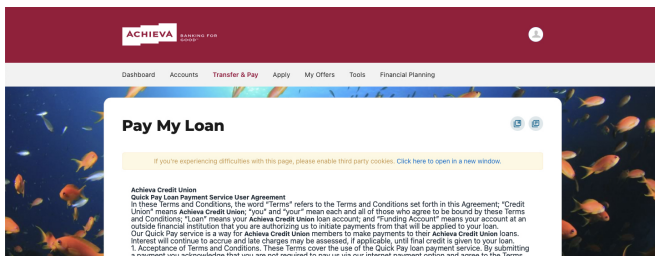
## Loan Application

1. Access the Apply menu
2. Click the type of loan you wish to apply for



## Pay an Achieva Loan with an External Account, Debit, or Credit Card

1. Access the Transfer & Pay menu
2. Click **Pay My Loan**



## Stop Payment

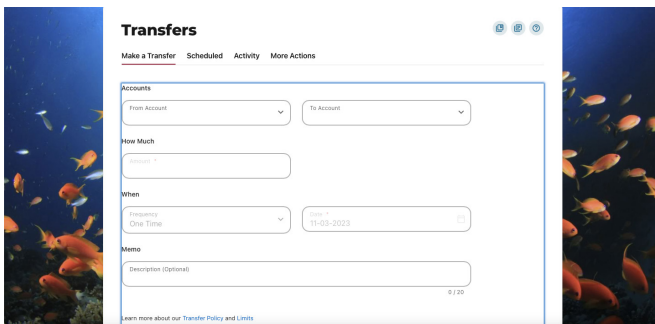
1. Access the Tools menu
2. Click **Check Services**
3. Click **New Stop Payment Request**
4. Enter the required information

## Transaction History/Pending Transactions

1. Access the Accounts menu
2. Click **My Accounts**
3. Click the specific account type and the history will display

## Transfer- To another bank

1. Access the Transfer & Pay menu
2. Click **Transfers**. If the account is not yet linked, please see **Linking to Another Bank Account** steps above.

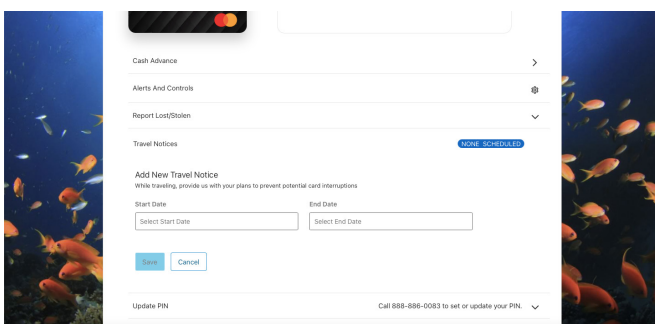
A screenshot of the 'Transfers' web interface. The page title is 'Transfers' and it has sub-tabs for 'Make a Transfer', 'Scheduled', 'Activity', and 'More Actions'. The 'Make a Transfer' tab is active. The form includes: 'Accounts' section with 'From Account' and 'To Account' dropdowns; 'How Much' section with a 'Amount' input field; 'When' section with 'Frequency' (One Time) dropdown and 'Date' (11-03-2023) input; and 'Memo' section with a 'Description (Optional)' input field. A 'Learn more about our Transfer Policy and Limits' link is at the bottom.

## Transfer- Within Achieva

1. Access the Transfer & Pay menu
2. Click **Transfers**. If transferring to another Achieva member's account that is not yet linked, please see **Linking to Another Bank Account** steps above.

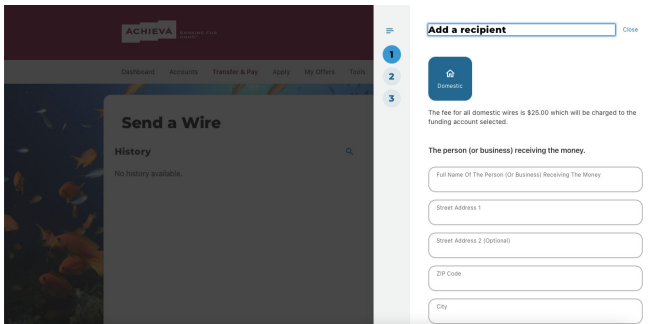
## Travel Notification

1. Access the Accounts menu
2. Click on **Card Management**
3. Click the card you wish to manage
4. Click **Travel Notices**
5. Enter your travel plans and click **Save**

A screenshot of the 'Travel Notices' web interface. The page shows a list of menu items: 'Cash Advance', 'Alerts And Controls', 'Report Lost/Stolen', and 'Travel Notices'. The 'Travel Notices' section is expanded, showing 'NONE SCHEDULED'. Below this is the 'Add New Travel Notice' section with the instruction 'When traveling, provide us with your plans to prevent potential card interruptions'. It includes 'Start Date' and 'End Date' input fields with 'Select Start Date' and 'Select End Date' placeholders. There are 'Save' and 'Cancel' buttons. At the bottom, there is an 'Update PIN' section with the text 'Call 888-886-0063 to set or update your PIN.' and a dropdown arrow.

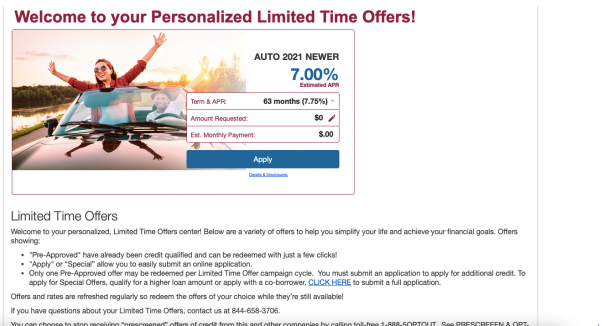
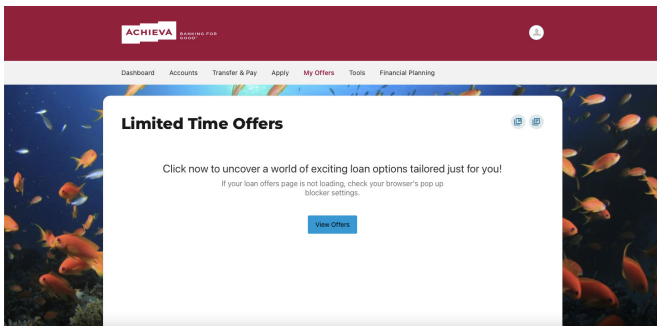
## Wire Transfer Request

1. Access the Transfer & Pay menu
2. Click **Send a Wire**
3. Click **New Wire Transfer**



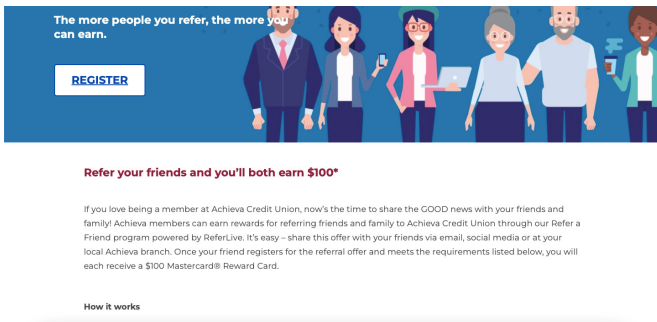
## Limited Time Offers

1. Access the My Offers menu
2. Click **Limited Time Offer**
3. Click **View Offers**. Your offers will be presented in a separate tab in your web browser.



## Refer a Friend

1. Access the My Offers menu
2. Click **Refer a Friend**
3. The Refer a Friend page will be presented in a separate tab in your browser.



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