Achieva’s Online Banking: Quick Reference Sheet.

Achieva’s online banking system was designed for our members with **GOOD** tools and options to manage your money and financial goals.

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**Registration**

**Online Banking Registration**

1. Click Register → Read the Online Services Agreement and checkmark “I Agree” → Click Continue.
2. Confirm your identity by entering the required information → Click Continue.
3. Enter a Username and click Check Availability → Select the Email or SMS Text Phone Number you’d like to have your Temporary Password sent to → Click Continue.
4. Retrieve your password from your Email or Text and enter it → Click Continue.
5. Select a Password. Re-enter it → Click Continue.
6. Select Three Question Pairs and Answers → Click Continue.
7. Choose a confidence image and text → Click Continue.
8. Confirm your contact information → Click Continue.

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**Account Setup/Customization**

**Hiding/Un-hiding Accounts**

1. From Dashboard
2. Select Settings → Accounts Tab.
3. Locate the account you wish to hide/unhide → Edit.
4. Check/Uncheck the Hide This Account checkbox → Click Save.

**Linking To Another Bank**

1. Select the Transfer Widget → Classic Tab.
2. Select Add Account → At Another Bank.
3. Read the Agreement → Click I Agree → Click Continue.
4. Enter the Bank Account information → Click Save.
5. We will send two (2) deposit transactions to the account.
   They may take up to three business days to appear in the transaction history.
6. Once the deposits have been made, Confirm the account by entering the two deposit amounts into Achieva’s Online Banking. Log On to Achieva’s Online Banking → Settings → Accounts → Confirm the external account.
7. To transfer to this account, see the section Transactions → Transfer-To Another Bank on page 2.

**Nicknaming Accounts**

1. From Dashboard
2. Select Settings → Accounts Tab.
3. Locate the account you wish to hide/unhide → Edit.
4. Enter a Nickname → Click Save.

**Themed Backgrounds**

1. From Dashboard
2. Select Settings → Themes Tab.
3. Select an available theme → Click Activate.

**Setting Up Alerts**

1. From Dashboard
2. Select Settings → Notifications Tab.
3. Locate the Notification you’d like → Set up Contact Method → Customize, as needed.
4. If you would like to set up text alerts, go to Settings → Contact → Edit and Confirm the phone number and then follow Steps 1-3 listed above.
Widgets and Dashboard
1. Select Settings → Widgets Tab.
2. In the Available Widgets Section → Click Add.
3. In the Active Widgets Section → Click the star for up to 5 of your favorite widgets to show on your Dashboard.

Transactions

Bill Pay
1. Select the Bill Pay Widget.

Check Reorder
1. Select the Check Services Widget → Reorder Checks Tab.

E-statements
1. Select My Accounts Widget.
2. Select the Statements Tab.

Loan Application
1. Go to Dashboard → Quick Links → Loan Application.

Pay Achieva Loan with Debit or Credit Card
1. Go to Dashboard → Quick Links → Pay Achieva Loan with Debit or Credit Card.

Stop Payment
1. Select the Check Services Widget.
2. Click New Stop Payment Request.
3. Enter the required information.

Transaction History/Pending Transactions
1. Select My Accounts Widget.
2. Click the specific Account Type → The history will display.

Transfer-To Another Bank
1. To transfer funds to your account at another bank, see the section Account Setup → Linking to Another Bank.
2. Once the account link has been established, go to the Transfer Widget → Classic. When selecting the “To” account, this account will now display.

Transfer-Within Achieva
1. Select the Transfer Widget.
2. If transferring a standard amount → select the From, Amount, and To Account (or),
3. If transferring a non-standard amount → recurring transfer, transfer to another member or transfer to your account at another financial institution, select the Classic Tab.

Travel Notification
1. Go to Dashboard → Quick Links → Travel Notification.

Wire Transfer Request
1. Go to Dashboard → Quick Links → Wire Transfer.

Visit AchievaCU.com for more online banking features or for a library of tutorial videos with more detailed instructions visit youtube.com/AchievaCreditUnion.