

Online Banking Redesign: Guide to Changes for Commercial Clients

Pinnacle's Online Banking has a new, clean look. Much of the functionality hasn't changed, but you'll notice some design differences. This reference guide outlines the key changes. If you have questions, please contact your financial advisor or one of our Treasury Management specialists at the numbers below:

Nashville	Knoxville	Memphis	Chattanooga
615-743-6200	865-766-3044	901-259-5440	423-386-2662

Or Toll-Free at 1-866-839-2781

Welcome Center and Tabs

The "Welcome Center" is at the top of every page in Online Banking. The tabs are under the Pinnacle Financial Partners logo.

Old Welcome Center and Tabs

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Snapshot	Accounts	Payments	Transfers	PFM	Cash Management	Notify Me Alerts	Messages	User Services

New Welcome Center and Tabs

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	ANCIAL	TARTNERS							
Home	Accounts ~	Bills & Payments	Transfers ~	PFM	Cash Management ∽				

The Welcome Center is the new home for Messages and Alerts. You can easily see if you have any new, unread messages or alerts.

	New Messages Area		New Alerts Area
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			Help



Tabs

Instead of hovering over a tab to see the drop-down menu, now you click on the tab name (Accounts or Transfers) for the drop-down menu to appear. The tabs that you see under the Pinnacle logo are changing slightly:

- The **Snapshot** tab has been replaced by a **Home** tab.
- The **Notify Me Alerts** and **Messages** tabs have gone away—these are now found in the Welcome Center at the top of the page.
- The User Services tab also went away. Instead, you can click on your name in the Welcome Center and choose the last option in the list, "All Services & Settings," or click "Contact Us."



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Services	& Settings								1 He
Quick Links							Conta	act Us	
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Note about the Welcome Center: The font resizer has been removed because default font sizes are increasing on some screens. You may still use the zoom function in your browser to increase or decrease font sizes as desired.



Home Tab

The new Home tab combines the features of the current Snapshot tab and Account Detail page. This is the new landing page in Online Banking—if you click the Pinnacle logo, you will be taken to this page.



Old Snapshot Screen

Old Account Summary Page

Notes about the Home page:

- Any unread messages appear in the left-hand column.
- Mask/unmask account number options are not shown on the home page. These can be found on the Account Details page.
- The Transfer button will take you to the Transfers page.
- The Actions column ("I want to...") has gone away. Instead, you can perform those actions (view detail, view history, transfer, etc.) in the detail page for that account.
- If you have more than six accounts, you can select the accounts you'd like to appear in the "Favorites" tab by clicking the star next to the account number. Up to 20 accounts can be marked as Favorites.



Accounts Tab

Click on the Accounts tab to see a list of your accounts and other options in the drop-down menu.

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2 Unrea Nov 18 Aug 18	Operating Trust Reserve Petty Cash Savings CD	1 *3212 *0022 *3254 *9902 *0000	\$5.53 \$25.39 \$30.81 \$8.05 \$9.49 N/A	Transfers Modify Acc	ount Nickname(s)	s 🖈	
				tty Cash ₅4★			

When you choose an account, it takes you to that account's details page.

Home Accoun	nts ∽ Bills & F	Payments Transfers	~ PFM C	ash Management 🗸	
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*3212	\$25.39	as of 12/15/2015 4:54 AM	1	Ledger Balance O	More Details & Routing Number Statements & Documer
Reserve *0022	\$30.81				Future Vi
Petty Cash *3254	\$8.05		ALERTS		
	\$8.05	ACTIVITY no recent	no new alert(s)		
Savings *9902	\$9.49				
CD *0000	N/A				
	N/A	Find transaction	۵	10/22/2016 - 11/29/2016	Download File View Report

On the details page you can transfer in, transfer out and reveal the full account number. You can also set up alerts in the "Alerts" tab and search for transactions.

NOTE: The "Category Name" on file now appears on the transaction details screen for an account, and it cannot be hidden.

Activity Tab on Account Details Pages

The details page for each account includes an "activity" section where you can search transactions, download files and view reports.



How to View History

If you'd like to see a list of transactions for a certain date range, click the "More options" button under the search bar.

ACTIVITY no recent	ALERTS no new alert(s)	
Find transaction	a 09/29/2016 - 10/28/2016	Download File View Report
Next 30 days		

Choose the date range and any other filter you'd like to include – Category, Transaction Type, Check Number and Amount – and click Search. A list of transactions will appear on the page. Click the ellipses next to the transaction description to see more details, including memo.

ACTIVITY no recent	ALERTS no new alert(s)					
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3/25/20 <mark>1</mark> 5	Daily Ledger Balance					30.8
	Telephone Transfer Debit	Select one	~		1.00	30.8
8/25/2015						

How to Download History

If you'd like to download a file for your accounting software or Excel, click the "Download File" button.



ACTIVITY no recent	ALERTS no new alert(s)		
Find transaction	n Q	09/29/2016 - 10/28/2016	Download File View Report
Next 30 days			

You'll be able to choose the file format and sorting preference from drop-down menus.

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Add any additional filters you choose – Category, Transaction Type, Check Number and Amount – and click "Download File."



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Transfers Tab

Click on the Transfers tab for your drop-down menu options. The design has changed slightly, but the functionality of this section will stay the same.



Cash Management Tab

Click on the Cash Management tab for your drop-down menu options. The design has changed slightly, but the functionality of this section will stay the same.

How to add a sub-user

Click on the Cash Management tab and choose Administration.



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Home	Accounts ~	Bills & Payments	Trans	fers ∽	PFM	Cash Management ~	
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On the Sub-Users Administration screen, click "I want to" in the top right corner and choose "Add A New Sub-User."

Sub-Users Administration		I want to N
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Complete and submit the Add New Sub-User form.

Cash Manage	ement		
Add New Sub-User			
User Info			
		* At least one phone number must b	be entered
* Access ID:	* Name:	Mobile Phone:	
* SSN:	* Email:	Alternate Phone #:	
* Confirm Temporary Passoo Access Configuration	de:		
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Sub-User Admin-Focus IP Addre	Note: Leave blank to enforce IP address	50, 60 200.5.10, 45.168.40.*, 27.22.4-5.* s restrictions assigned at the focus customer level.	
Access to Accounts			
Please select the Basic Service	e level for each account this user can access	online.	
Click "Help" for an explanation	of Basic Services options. Click "Submit" to	process your selection.	
Account Type	Account #	Account Name	Basic Services

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