

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

			Last Login: 1	0/31/16 at 12	23 PM CDT Welcome	Betty Test ∽ ∣ Log	Out Contact I	Us I A A A	
		54 S							
Snapshot	Accounts	Payments	Transfers	PFM	Cash Management	Notify Me Alerts	Messages	User Services	

New Welcome Center and Tabs

	linn	arla			Welcome Be	etty Test ~	Log Out	Contact Us	2 Messages ~	1 Alerts ~
FI	NANCIAL	PARTNERS								
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	Messag	es Area			Ν	ew Alerts	Area	
Welcome Betty Test	 Log Out 	Contact Us	2 Messages ×	1 Alerts ~	Welcome Betty Test	 Log Out 	Contact Us	2 Messages ~	1 Alerts 🗸
	Nov 18	Passcode (Changed!				Nov 1	8 Passcode chan	iged
gement ~	Aug 18	New Acces	s Granted!	-			Setting	s Vi	ew All Alerts
gomon	New Messa	age V	iew All Messages	A Help	ement ~		County		
									1 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- The **Snapshot** tab has been replaced by a **Home** tab.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."



Pinn				Welcome Betty Test ~	Log Out	Contact U	s 3 Messages ~	∆ Alerts ∨
me Accounts ~	Bills & Payments	Transfers ~	PFM	Cash Management ~				
Services	& Settings							1 Help
Quick Links						Conta	ict Us	
Change passcode Stop check payme	Cha nt Vie	ange phone, ema w statements &	ail or addre document	ss Reorder checks s		c	615-744-3700 or 800-264-3613	
						Fax	615-849-3326 Send a Secure Message	
	0.11					0	Send a Secure File	
All Services &	Settings					Contac	et Information	
Security Actions Stop check payment	s Pri Tra ACI Vie Mo Onl	eferences nsaction categorie H batches - items p w statements & do dify account acces ine accounts Add account Modify access & se	s per page cuments is ervices	Banking Services Enroll / update Mobile Banking Enroll / update Commercial Mobil Banking Request documents Reorder checks	e	Pinnac 150 3r Suite 9 Nashv	c le Financial Partners d Avenue South 00 ille, TN 37201	
Security Setting	s Dis	splay Settings		Other				
Change phone, email Change your: Passcode Security question:	or address Acc Def List	count nicknames ault history configu sorting	uration	Personal finance software access Open an Account	8			

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.

	PINANCIAL	acie Martners			w	elcome Be	etty Test ~
Но	me Accounts ~	Bills & Payments	Transfer	s ~ PFM	Cash Managen	nent ~	
2 L Nov Aug	Inrea 18 Reserve 18 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 🖈	
			Pe *32	etty Cash ₅4★			

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

Home Account	nts∨ Bills&i	Payments Transfers	~ PFM C	ash Management 🗸	
					🕜 Add An Account 🔒 Print 🚯 H
		Reserve ²	*0022		
Operating 1	\$5.53				
Truet		\$30.81 Available [©]		\$30.81	Transfer In Transfer Ou
*3212	\$25.39	as of 12/15/2015 4:54 AM	И	Ledger Balance	More Details & Routing Numbe Statements & Documer
Reserve *0022	\$30.81				Future Vi
Petty Cash	60 of		ALEDTO		
^3254	\$8.05	no recent	no new alert(s)		
*9902	\$9.49				
CD					
	N/A	En la constante	0	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	6 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)					
Find transa	action Q 06/01/	/2015 - 11/02/2015		Downloa	ad File	w Report
from 06/01	1/2015 🗂 to 11/0	2/2015				
Add another fil	ter			3 results.	Reset	Search
Date 🔻	Description -	Category 💌		Credit 💌	Debit 💌	Balanc
3/25/2015	Daily Ledger Balance					30.8
	Telephone Transfer Debit	Select one	~		1.00	30.8
3/25/2015						

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 transactio	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.

G			
Format	Spreadsheet CSV ~ Sorting D	ate Descending \vee	
from	SpreadSheet Spreadsheet CSV	6 🗂	
Add and	Spreadsheet FLC Spreadsheet TSV		
	Advanced Formats Microsoft Money® Active State	ment	Reset Download F
925.39	BAI2 Format		
	Microsoft Money® OFX		
	QuickBooks® WebConnect®		
	Quicken® WebConnect®		
	Quickon® OIE		
	Quicken® QIF		
\$8.05	Quicken® QIF		
\$8.05	Quicken® QIF		
ssos wnloa	Quicken® QIF		
S8.05 Swnloa Format	Quicken® QIF	ite Descending ~	
\$8.05	Quicken® QIF ad File Spreadsheet CSV ~ Sorting Da	ite Descending V	
\$8.05 DWNIOa Formet from 0	Quicken® QIF ad File Spreadsheet CSV > Sorting Da 9/29/2016 to C	te Descending ~ Date Descending Date Ascending	
\$8.05 DWNIO2 Format from 0 Add anoth	Quicken® QIF ad File Spreadsheet CSV > Sorting Da 9/29/2016 to C	Ite Descending ~ Date Descending Date Ascending Check Number Descending	
\$8.05	Quicken® QIF ad File Spreadsheet CSV > Sorting Da 9/29/2016 to 0	te Descending > Date Descending Date Ascending Check Number Descending Check Number Ascending	
\$8.05 DWNIO3 Format from 0 Add anoth	Quicken® QIF ad File Spreadsheet CSV > Sorting Da 9/29/2016 to C	te Descending ~ Date Descending Date Ascending Check Number Descending Check Number Ascending Description Descending	Reset Download F
\$8.05 Pormat from 0 Add anoth	Quicken® QIF ad File Spreadsheet CSV ~ Sorting Da 9/29/2016 to C	Ite Descending ~ Date Descending Date Ascending Check Number Descending Check Number Ascending Description Descending Description Ascending Fransaction Category Descending	Reset Download F
\$8.05 Dwmloa Formet from 0 Add anoth 5559	Quicken® QIF ad File Spreadsheet CSV > Sorting Da 9/29/2016 prefilter	Ite Descending > Date Descending Date Ascending Date Ascending Check Number Descending Description Descending Description Ascending Fransaction Category Descending Fransaction Category Ascending	Reset Download F

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



Format	QuickBooks® WebConnect® > Sarting Date Descending >	
from	19/01/2016 🗂 to 10/28/2016 🗂	
AND	ategory v is Select Category v	S Remov
	ransaction Type \vee 🛛 is Select One 🗸	S Remov
AND	heck Number 🗸 is from Check# to Check#	8 Remov
AND A	mount vis from \$ Amount to \$ Amount	S Remov

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.



FI		Welcome Betty Test 🗸					
Home	Accounts ~	Bills & Payments	Trans	fers ∽	PFM	Cash Management ~	
Ca	ash Mar	nagement				Cash Management Menu ACH Origination Wire Transfers EFTPS	
ACH	4	Le	earn more »	Wire	Transfe	Book Transfers	ore »
>	Pending ACH Batc History Consumer Transa > Payroll Batch	hes		> Pe > Hi > Si > Re	ending Vire story ngle Wire epetitive Wire	Administration	

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
Access ID	Name	Actions
Com-Retail-APP ØDisabled	Test User 3	I want to V
bnsubuser1	Betty's Subuser1	I want to 🗸
bnsubuser2 ODisabled	Betty's Subuser2	I want to V

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:			
IP Address:		This IP overrides the IP defined at focus oustomer level		
Sub-User Admin-Focus IP Addr	comma-separated list. e.g. 63.245.17.2 Note: Leave blank to enforce IP addres: ess:	50, 60 200.5.10, 45 168.40 *, 27.22.4-5.* restrictions assigned at the focus customer level.		
Access to Accounts				
Please select the Basic Servic	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	

If you have any questions about the Online Banking redesign, please contact us:

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

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