



STEP-BY-STEP GUIDE: Online Banking

Using the e-Docs Widget

The following step-by-step guide was developed to assist you in navigating the e-Docs widget within Online Banking. You can also contact us at 855.855.8805.

Steps 1-5 are for members who do not see the “E-DOCS” widget on the left-hand side menu. If you already have the E-DOCS widget favorited, you can skip to step 9.

- 1) Log into First Tech Online Banking and select “MORE” from the left-hand side menu:

The screenshot displays the First Tech Online Banking dashboard. The left-hand side menu includes buttons for DASHBOARD, ACCOUNTS, BILL PAY, TRANSFER, MESSAGE CENTER, and MORE... (highlighted with a red box). The main dashboard area shows the following information:

- Dashboard:** Includes icons for accounts, bill pay, transfer, message center, and help.
- My Accounts:** A table showing account balances and recent transactions.
- Last 15 days:** A summary of activity for the last 15 days, including 'Logged in 28 times'.
- Next 15 days:** A summary of activity for the next 15 days, including '390 transfers' and a total of '\$435.75'.
- Quick Links:** A list of quick links including 'Setup Notifications', 'Make a Transfer', and 'Pay a Bill'.

Account Type	Account Name	Account ID	Balance
Checking	Business Account	*4193	\$140.90
	CHECKS REDCARD	*3458	\$140.70
Savings	Savings with Carol	*1305	\$1,260.98
	Carefree Savings	*8548	\$283.89
	Business Savings	*4390	\$972.09
	Membership Savings	*6889	\$0.00



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2) Click on "WIDGET OPTIONS":

The screenshot shows the 'Dashboard' page of the First Tech online banking system. The main content area is titled 'My Accounts' and displays a list of accounts with their current balances and recent transactions. A red box highlights the 'WIDGET OPTIONS' button in the bottom right corner of the account list.

Account Type	Account Name	Account ID	Current Balance	Recent Transaction
Checking			\$140.90	
Business Account		*4193	\$0.20	\$0.20
CHECKS REDCARD		*3458	\$140.70	\$140.70
Savings			\$1,260.98	
Savings with Carol		*1305	\$5.00	\$5.00
Carefree Savings		*8548	\$283.89	\$283.89
Business Savings		*4390	\$972.09	\$972.09

Navigation menu items: DASHBOARD, ACCOUNTS, BILL PAY, TRANSFER, MESSAGE CENTER, MORE...

Bottom navigation bar: CHECK SERVICES, DEPOSIT, WIRES, INVESTMENTS, E-DOCS, WIDGET OPTIONS (highlighted)

Right sidebar: Last 15 days (Logged in 28 ti...), Next 15 days (390 transfers), Quick Links (Setup Notifications, Make a Transfer, Pay a Bill)



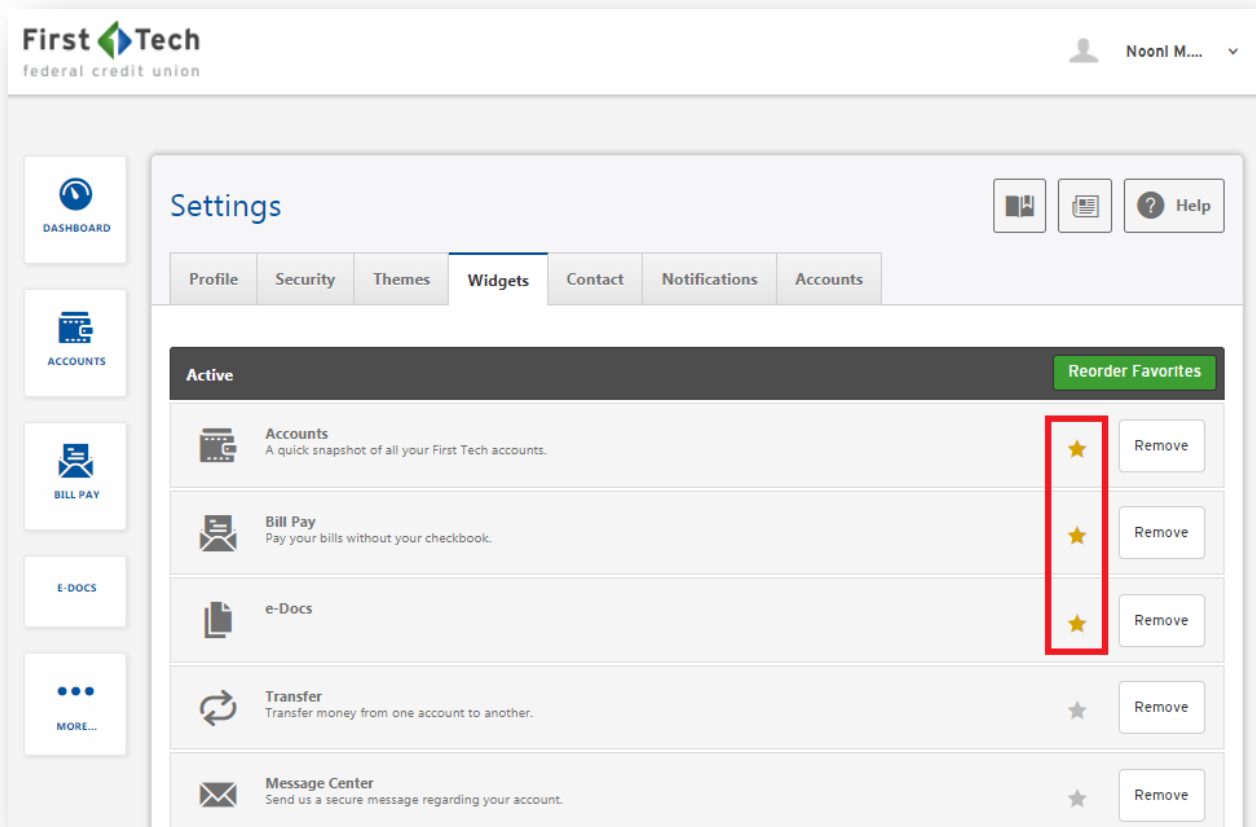
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3) Scroll down to the “Available” section and click “Add” to manually add your “e-Docs” widget:



4) You can then select up to five favorited widgets. They're active when the stars appear as yellow:





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Using the e-Docs Widget

5) Your updated list of favorite widgets will appear on the left-hand side menu:

First Tech
federal credit union

Dashboard

My Accounts

Account Type	Balance
Checking	\$140.90
Business Account	\$0.20
CHECKS REDCARD	\$140.70
Savings	\$1,260.98
Savings with Carol	\$5.00
Carefree Savings	\$283.89
Business Savings	\$972.09
Membership Savings	\$0.00

Last 15 days

Logged in 28 times

Next 15 days

390 transfers \$435.75

Quick Links

- Setup Notifications
- Make a Transfer
- Pay a Bill
- Add new service

6) To access e-Docs, first, you need to “Subscribe” to use the feature:

e-Docs

Overview | Statements | Notices | Tax Forms

Welcome to your eDocuments!

We have made some changes to the e-Docs/e-Statements section that will make it easier to view and access your e-Statements, Notices, and Tax forms. Click the tabs to discover what is available.

If you need to access past statements, tax forms, or notices, please send a message through our **Message Center** indicating both the document type and the date the original document was released.

Important Notice: We have made changes to the Membership and Account Agreement and our Limitation and Termination of Services Corporate Policy. Please review the summary of changes and policy [here](#)

UNSUBSCRIBED You are not receiving eStatements.

Subscribe



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Using the e-Docs Widget

- 7) A “Subscription Disclosure” window will then pop up. Read through the disclosure content and if you consent check the “I Agree” box. Then, proceed to “Open PDF”. A PDF will open in another browser window, where you can access a unique 5-character code, for example “ZU812”. Enter the unique code from the PDF into the text box. Finally, click on “Subscribe” to finish:

Subscription Disclosure

Your statements are now available.

Please accept the disclosure to confirm this change:

Online Services E-sign Disclosure and Consent

Please read this information carefully and print and retain a copy for your reference. This Online Services E-Sign Disclosure and Consent (“Disclosure”) applies to all Communications for those products, services and Accounts offered or accessible through the online services.

The words “we” “us”, and “our” refer to First Technology Federal Credit Union and the words “you” and “your” mean you, the individual(s) or entity identified on the Account(s). As used in this disclosure “Account” means the account you have with us. “Communication” means any customer agreements or amendments, monthly billing or account statements, tax statements, disclosures, notices, responses to claims, transaction history, privacy policies and all other information related to the product, service or Account, including but not limited to information that we are required by law to provide to you in writing

Scope of Communication to Be Provided in Electronic Form. When you use a product or service, you agree that we may provide you with any Communications in electronic format, and that we may discontinue sending paper Communications to you, unless and until you withdraw your consent as described below. Your consent to receive electronic

I Agree

PDF Access Confirmation

Before you proceed, we need to make sure you can open PDF documents.

1. [Open PDF](#)
2. Copy the 5 character code into the text box below.

ZU812*

Cancel **Subscribe**



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Using the e-Docs Widget

8) The page will automatically redirect you to the e-Docs page, showing:

e-Docs

Overview Statements Notices Tax Forms

Welcome to your eDocuments!

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SUBSCRIBED You are receiving eStatements. Unsubscribe

9) To view or download your credit card, mortgage, monthly/quarterly membership statements, click on the “Statements” tab. To view a specific Statement within that tab, click on the item and it will pop up:

e-Docs

Dashboard Accounts Bill Pay Transfer Message Center E-DOCS

Overview **Statements** Notices Tax Forms

Statements

e-Statements are released shortly after your statement cycle ends. Here you can view and download your credit card, mortgage, and monthly/quarterly membership statements.

If you need to access past statements, tax forms, or notices, please send a message through our **Message Center** indicating both the document type and the date the original document was released.

DATE: All Dates | DOCUMENT TYPE: All document types

DATE	NAME	ACCOUNT
JUN 30 / 2017	Member Combined Statement	Membership Sav... *6889
MAR 31 / 2017	Member Combined Statement	Membership Sav... *6889
FEB 20 / 2018	Monthly Statement	*****9516
JAN 18 / 2018	Monthly Statement	*****9516



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10) To access important notices pertaining to your checking and savings accounts, loans, deposit products, credit cards, click on the “Notices” tab. To view the specifics of each notice, click on the item for it to pop up:

The screenshot shows the 'e-Docs' interface with the 'Notices' tab highlighted. The interface includes a sidebar with navigation options: DASHBOARD, ACCOUNTS, BILL PAY, TRANSFER, MESSAGE CENTER, and E-DOCS. The main content area displays a list of notices with columns for DATE, NAME, and ACCOUNT. The first notice, dated SEP 23 / 2017, is highlighted with a red box.

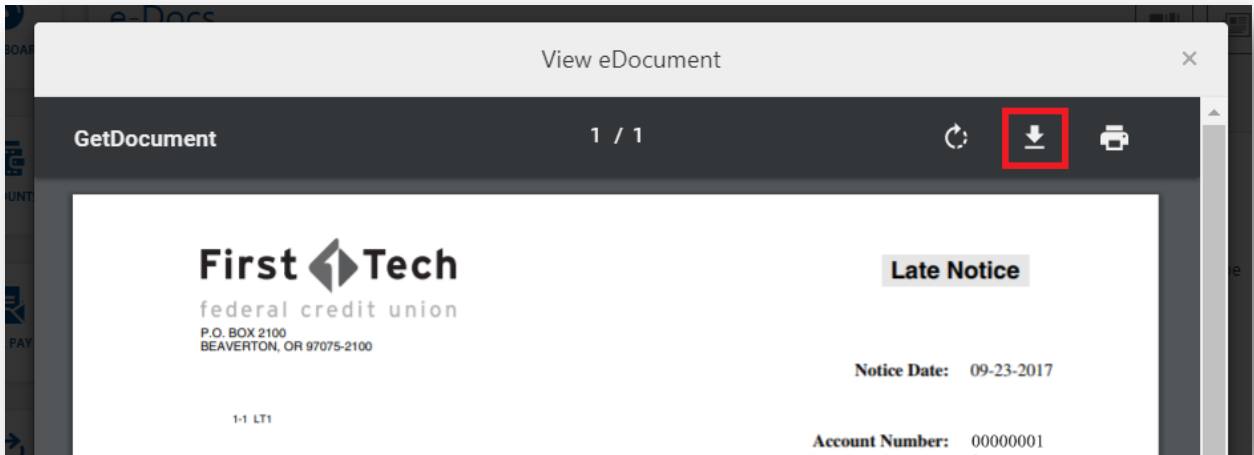
DATE	NAME	ACCOUNT
SEP 23 / 2017	Late Notice	Personal * 0001
JUL 5 / 2017	Late Notice	Personal * 0001
JUN 23 / 2017	Late Notice	Personal * 0001
MAY 5 / 2017	Late Notice	Personal * 0001



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- 11) The Statement/Notice/ or Tab Form then pops up the “View eDocument” tab; where you can download and save the document as a PDF:



- 12) In the “View eDocument” pop-up tab, you can also print the document by clicking on the “printer” icon:

