

Receipts and Forms in It's Me 247 – Quick Guide

Step 1. Credit Union employee simply checks “Send to Member” before clicking “Save”

ProDOC - Signature Capture(KKARNES)

Form Name: Receipt

*Account: 111111111

Teller_ID: 28

Other:

*Required

Remove Form Elements

Member number 111111111
 Member name TAMMY M TESTTTT
 Person served TAMMY M TESTTTT
 Date and time 10/14/2020 11:20 ET
 Branch/served by 01/28
 Receipt ID 1258708

-----Today's Transactions-----
 Acct Transaction Amount
 CASH IN 630.00
 -001 CHECKING DEPOSIT 630.00
 CASH BACK .00

-----Account Summary-----
 Acct Description Balance
 -000 REGULAR SHARE 67.89
 Available funds 62.89
 -050 CRYSTAL FREE CHK 506.01
 Available funds 506.01
 -060 CHRISTMAS CLUB 10/3 50.00
 Available funds
 -850 VISA PLATINUM REWAR
 Available funds

-----End of Receipt-----

Add this document to package:

Time Frame Users
 120 Days No Limit Current All Refresh

Cash Tracker

Photo Print eSign Send To Member Save Cancel

Step 2. Member logs into It's Me 247 to view their documents by clicking “eStatements & Documents” in the Member Services drop down

It's Me 247 Online Banking

Home Pay & Transfer Member Services Go Mobile New Accounts JOHN

Member Services

ACH Transactions Overdraft Services Dividend/Interest Summary eStatements & Documents

Order Checks Download Account History Everence MyNeighbor Printed Statement Style Options

Score Card Rewards SavvyMoney MoneyMap

Helpful Links

eAlerts & Text Notifications

Custom Form

Member Offers

Modify a Loan Payment

Want to Skip a Loan Payment?

Apply for a Loan

Money Management

Bill Pay

Quick Transfer

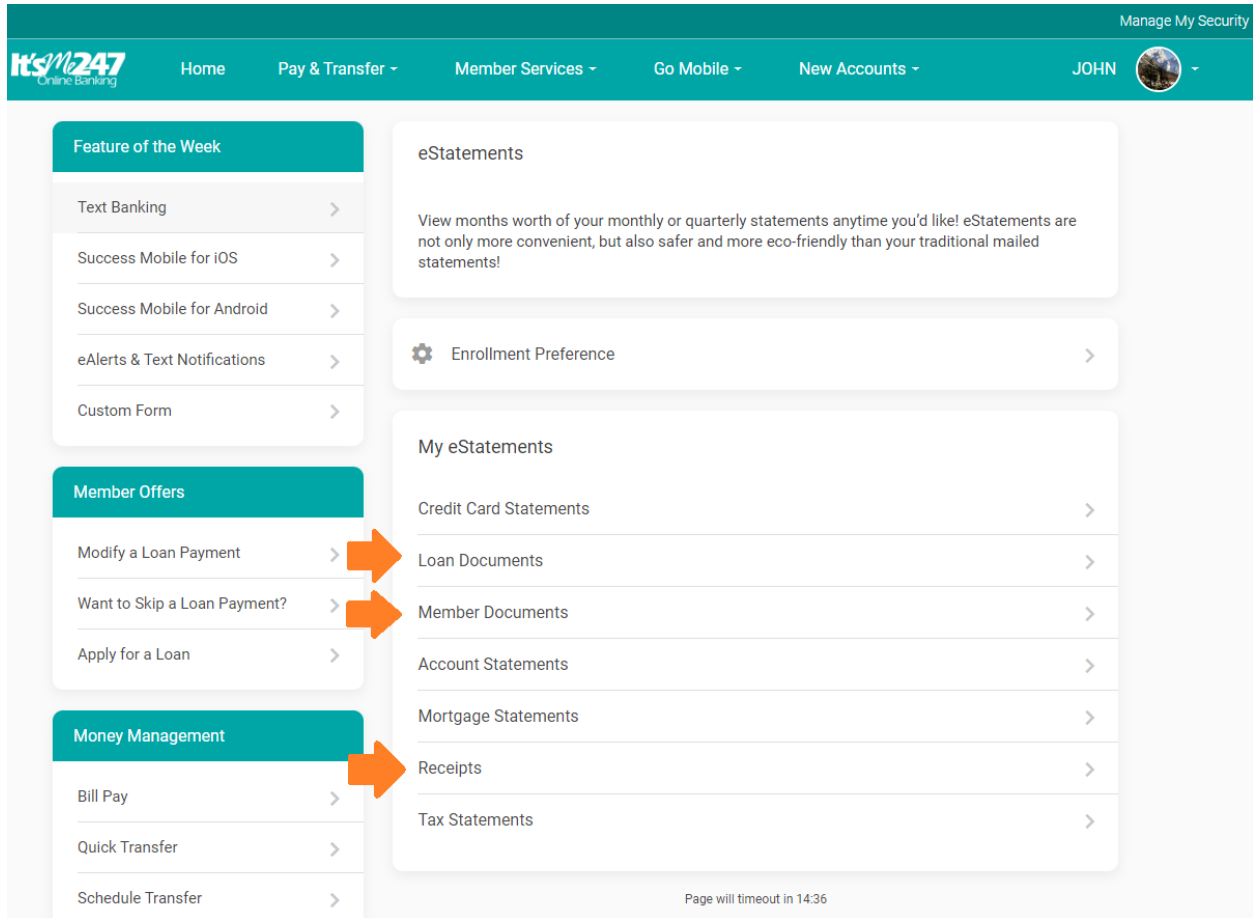
JOHN, You've been approved!
 Not just pre-approved... you can borrow up to \$500.00 right now based on your membership status! Not Now View

Favorite Accounts

796 INDIRECT LOAN	Balance	\$1,000.00
000 PRIME SHARES	Available Balance	\$21,085.00
700 CLOSED END LNS	Balance	\$0.00

Start Chat

Step 3. Member is then prompted to select the document they are looking for. Notice here that “Loan Documents”, “Member Documents”, and “Receipts” are now available.

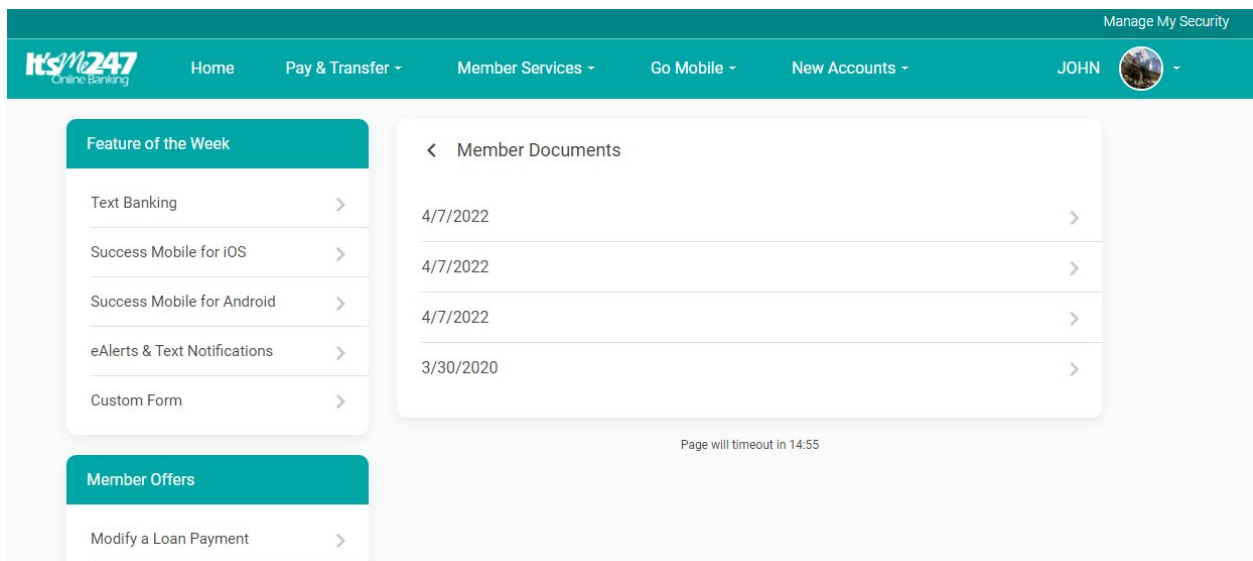


The screenshot shows the online banking interface for HCS 247. The top navigation bar includes 'Home', 'Pay & Transfer', 'Member Services', 'Go Mobile', 'New Accounts', and a user profile for 'JOHN'. The main content area is divided into several sections:

- Feature of the Week:** Text Banking, Success Mobile for iOS, Success Mobile for Android, eAlerts & Text Notifications, Custom Form.
- Member Offers:** Modify a Loan Payment, Want to Skip a Loan Payment?, Apply for a Loan.
- Money Management:** Bill Pay, Quick Transfer, Schedule Transfer.
- eStatements:** View months worth of your monthly or quarterly statements anytime you'd like! eStatements are not only more convenient, but also safer and more eco-friendly than your traditional mailed statements!
- Enrollment Preference:** A settings icon followed by the text 'Enrollment Preference'.
- My eStatements:** A list of document types with right-pointing arrows: Credit Card Statements, Loan Documents, Member Documents, Account Statements, Mortgage Statements, Receipts, Tax Statements.

Orange arrows point to the 'Loan Documents', 'Member Documents', and 'Receipts' options in the 'My eStatements' list. A 'Page will timeout in 14:36' message is visible at the bottom.

Step 4. Member then selects the date of the document they wish to download.



The screenshot shows the online banking interface for HCS 247, now displaying the 'Member Documents' selection screen. The top navigation bar is the same as in the previous screenshot. The main content area is divided into several sections:

- Feature of the Week:** Text Banking, Success Mobile for iOS, Success Mobile for Android, eAlerts & Text Notifications, Custom Form.
- Member Offers:** Modify a Loan Payment.
- Member Documents:** A list of dates with left-pointing arrows and right-pointing arrows: 4/7/2022, 4/7/2022, 4/7/2022, 3/30/2020.

A 'Page will timeout in 14:55' message is visible at the bottom.