



Online Banking Features

- View account transactions, balances and history
- Track weekly spending
- Transfer funds within your accounts or to other Trius members
- Pay bills
- Make loan and credit card payments
- View e-statements and e-notices
- Add account alerts
- Apply for a loan
- Locate the nearest branch or Shared Branching location
- Send a secure message to a Trius representative
- Plus much more!

Online Banking Login

Go to Triusfcu.com and click on the **Online Account Access Log In** box. If you are enrolled continue entering your username and password.

If you need to enroll, please see the **Enrollment Instructions**.

Once logged in, you are taken to the dashboard screen that shows a summary of your account information.



Dashboard (Home) Screen

Below is a brief description of each clickable section included in the dashboard. A detailed explanation of each screen and its features will follow.

Member Profile icon: You can view your personal profile information and update your email, phone number, address, and change your password. You may also add a profile picture. Be sure to add your cell phone number to activate the text message option for alerts and Multi-Factor Authentication.

Dashboard: You are taken to the dashboard (home) screen each time you login. If the menu item is highlighted with a dark blue background, that means you are currently viewing that screen.

Transfer Money icon: You can transfer funds within your accounts or to other Trius members.

My Finance icon: You can view and manage: loan & credit card payments, scheduled transfers, account transaction history, your Trius member contacts/recipients, bill payments & payees.

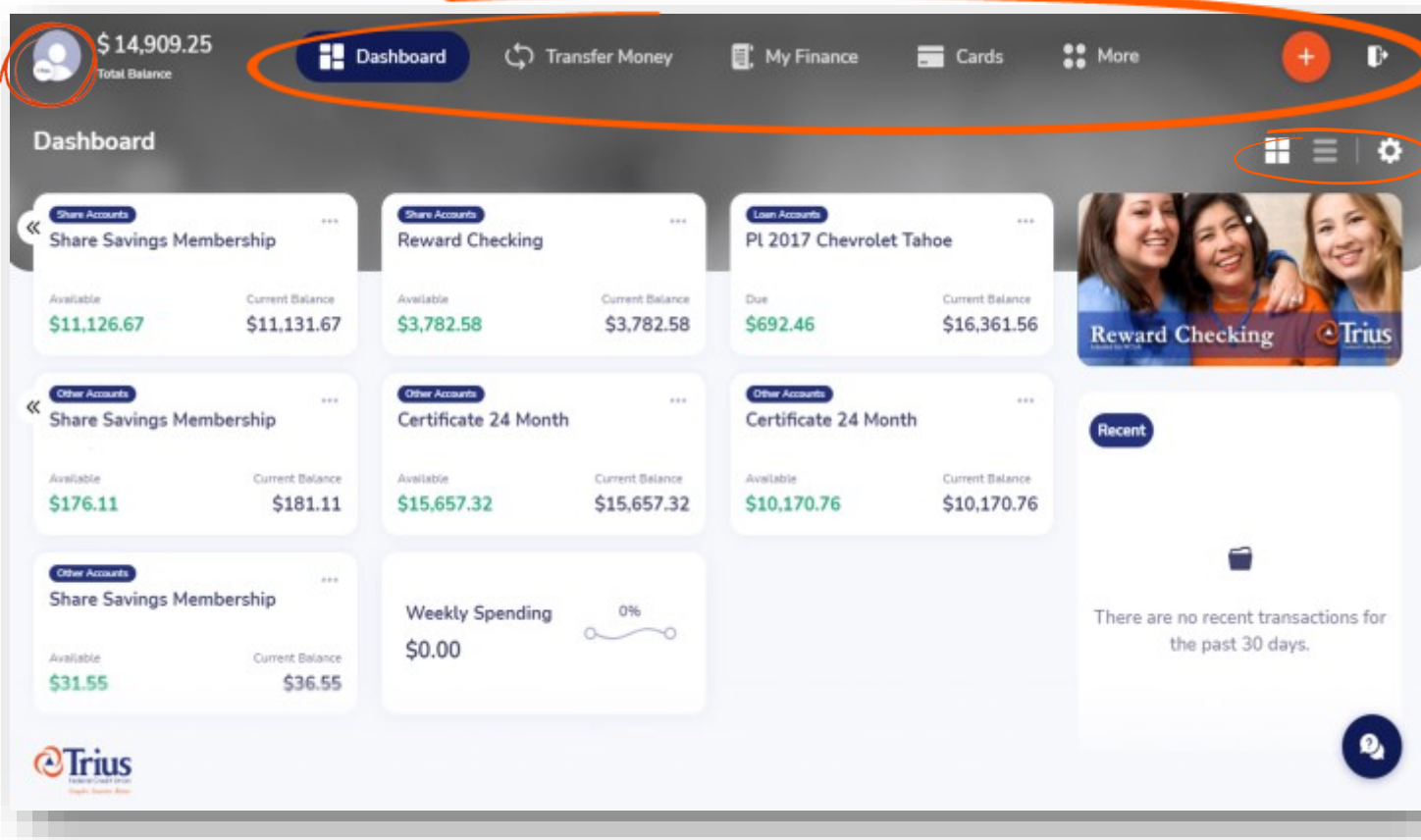
Cards icon: You can view your credit card. Click on **Manage Cards** and be taken to the **eZCard** portal to manage your Trius Platinum Visa credit card.

More icon: When you click the more icon, a drop-down menu with more features and options appears.

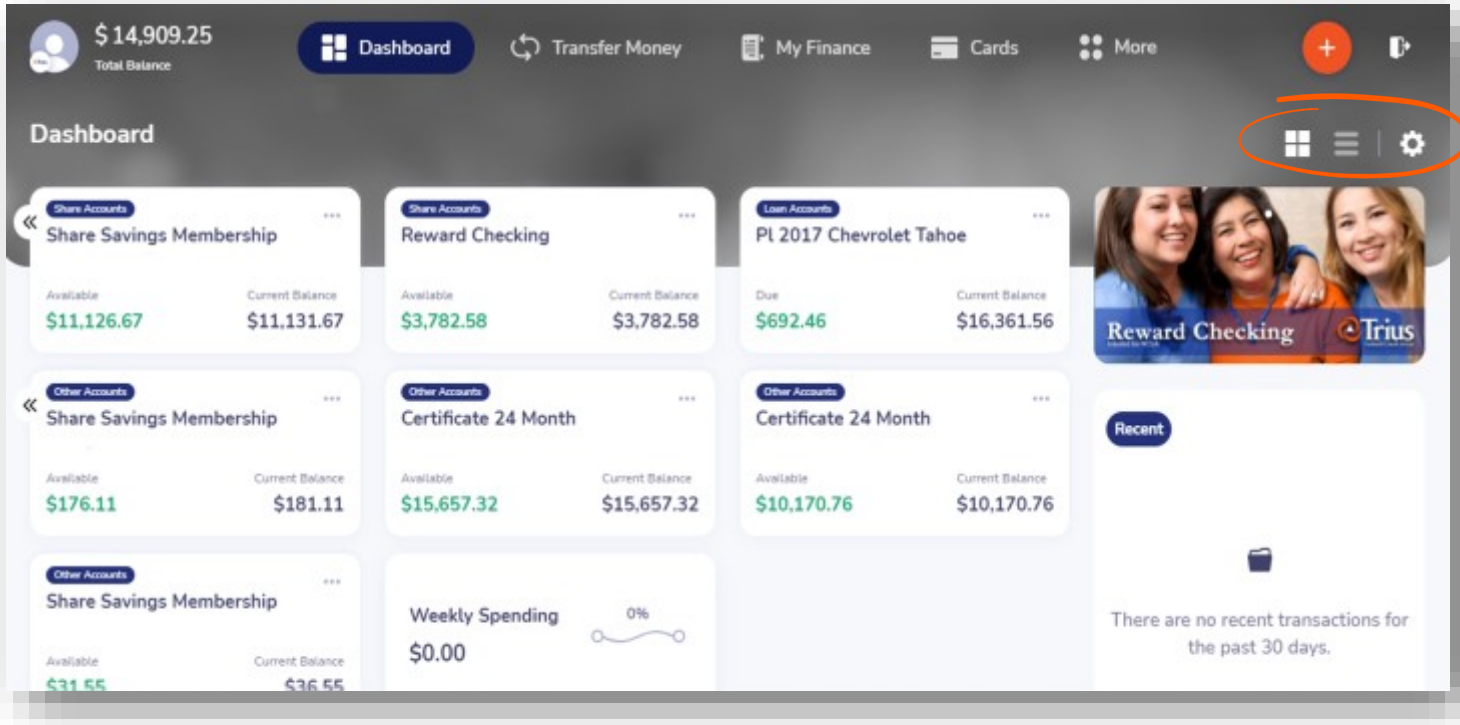
Plus Sign: Click here and a menu with icons to open a share account, apply for a loan, pay bills, and add alerts appears.

Log Out icon: When you click on the icon you will be logged out of online banking.

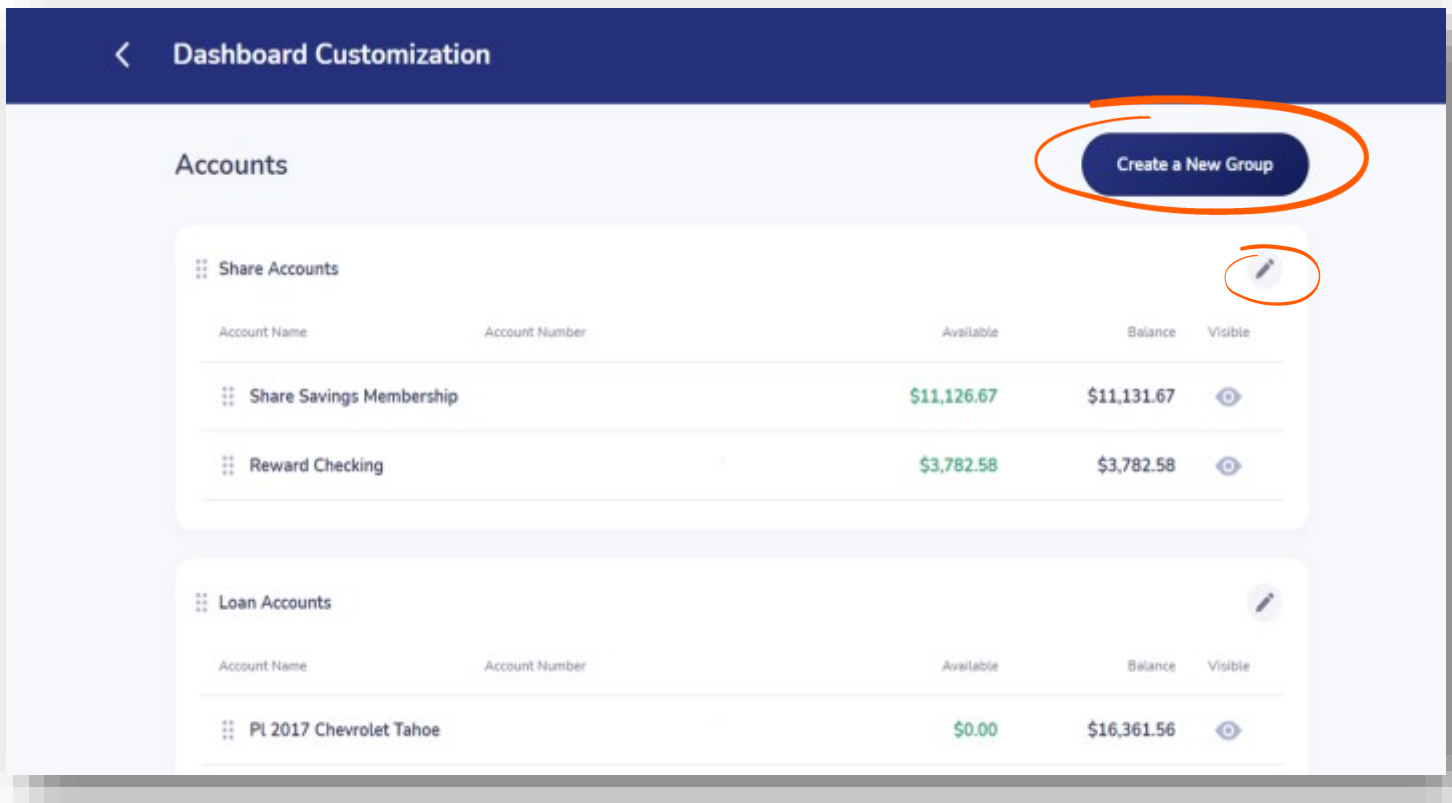
Tile, List and Gear icons: You can change your dashboard view from tile view to list view and back when you select either icon. The gear icon allows you to further customize what is included in your dashboard view.



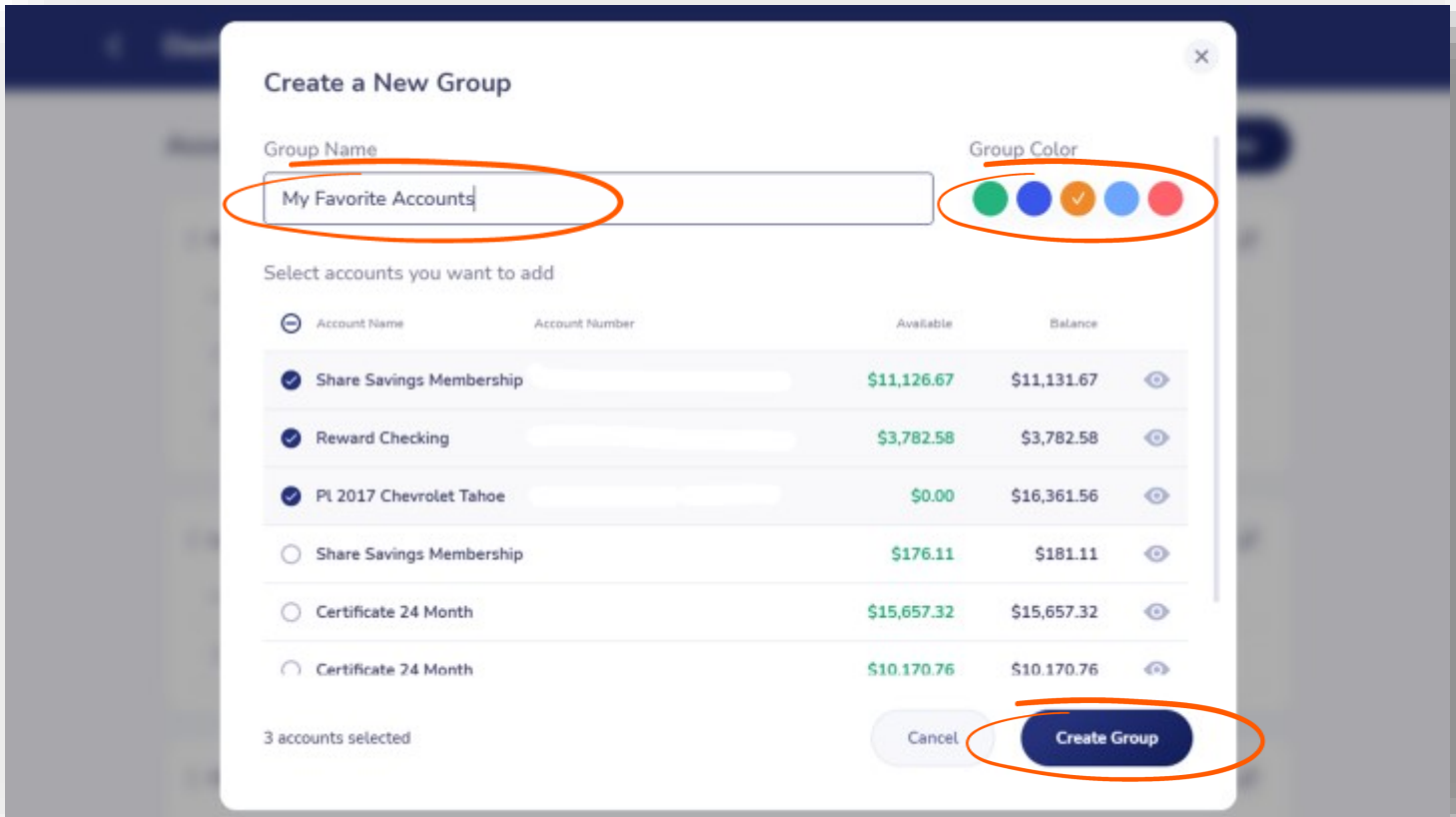
Dashboard - Gear Settings icon: Click on the gear icon and you are taken to the dashboard Customization Screen.



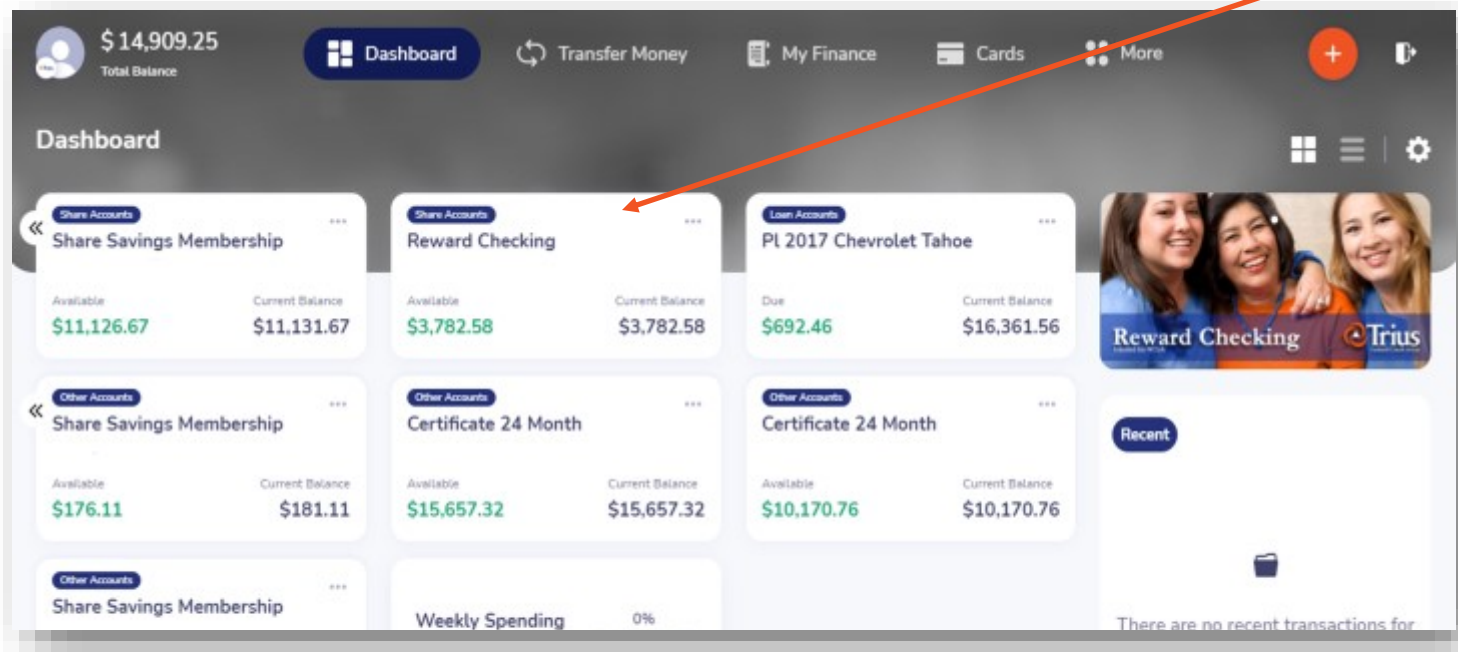
Dashboard Customization: This screen shows how your accounts are organized on the dashboard. In the example below, there are two groups, share accounts and loan accounts, with individual accounts listed under each group. These individual accounts can be dragged and dropped to change their order. You may also edit if they are visible or not visible, or create a new group. Any customization you make in online banking will transfer to mobile banking.



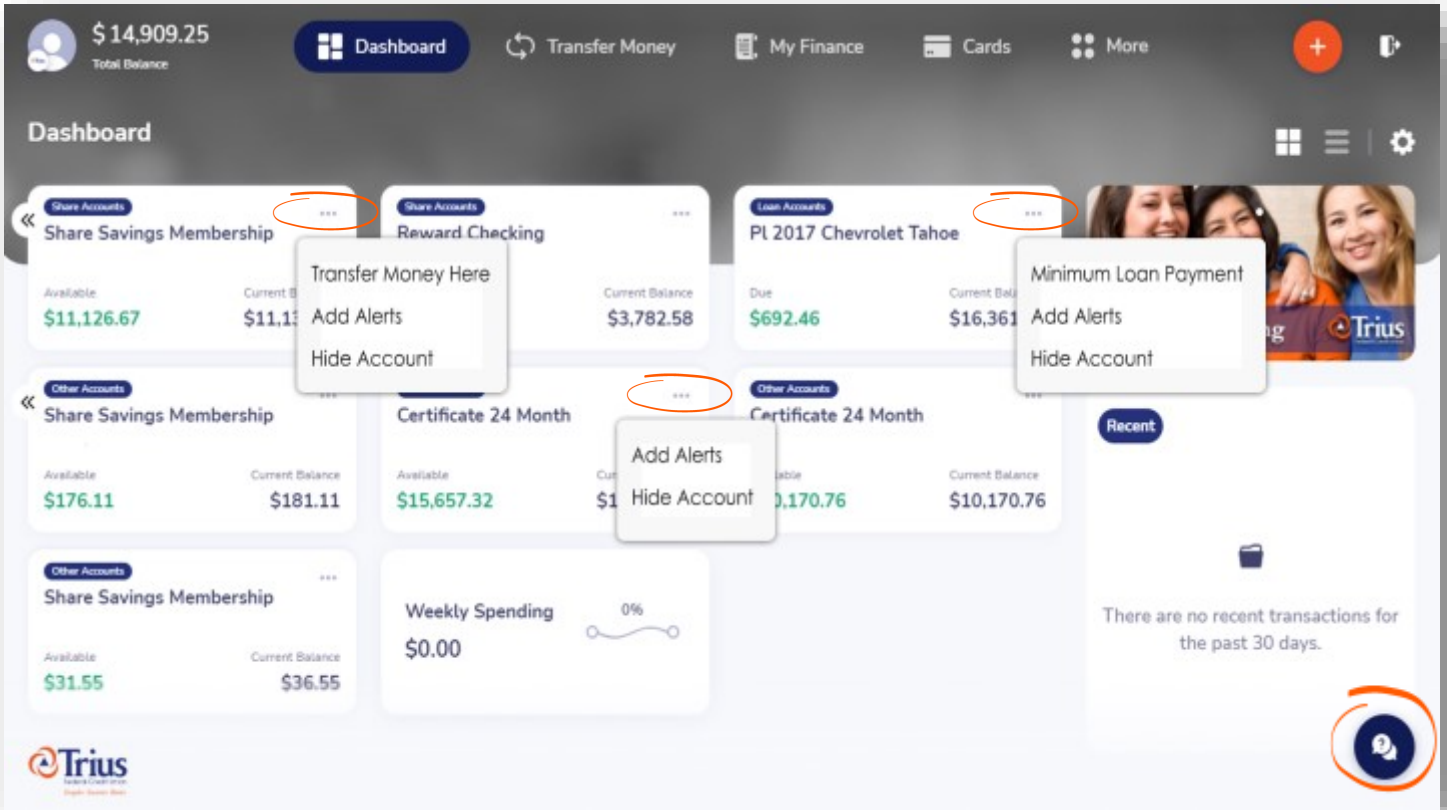
Create a New Group: This screen shows how you can create a new group by typing in your preferred group name, then selecting the color you would like to assign to the group, and finally select the individual accounts you would like to show within the group. Once all the group features have been selected, you will then click **Create Group**. Now this group of accounts are grouped together on your dashboard .



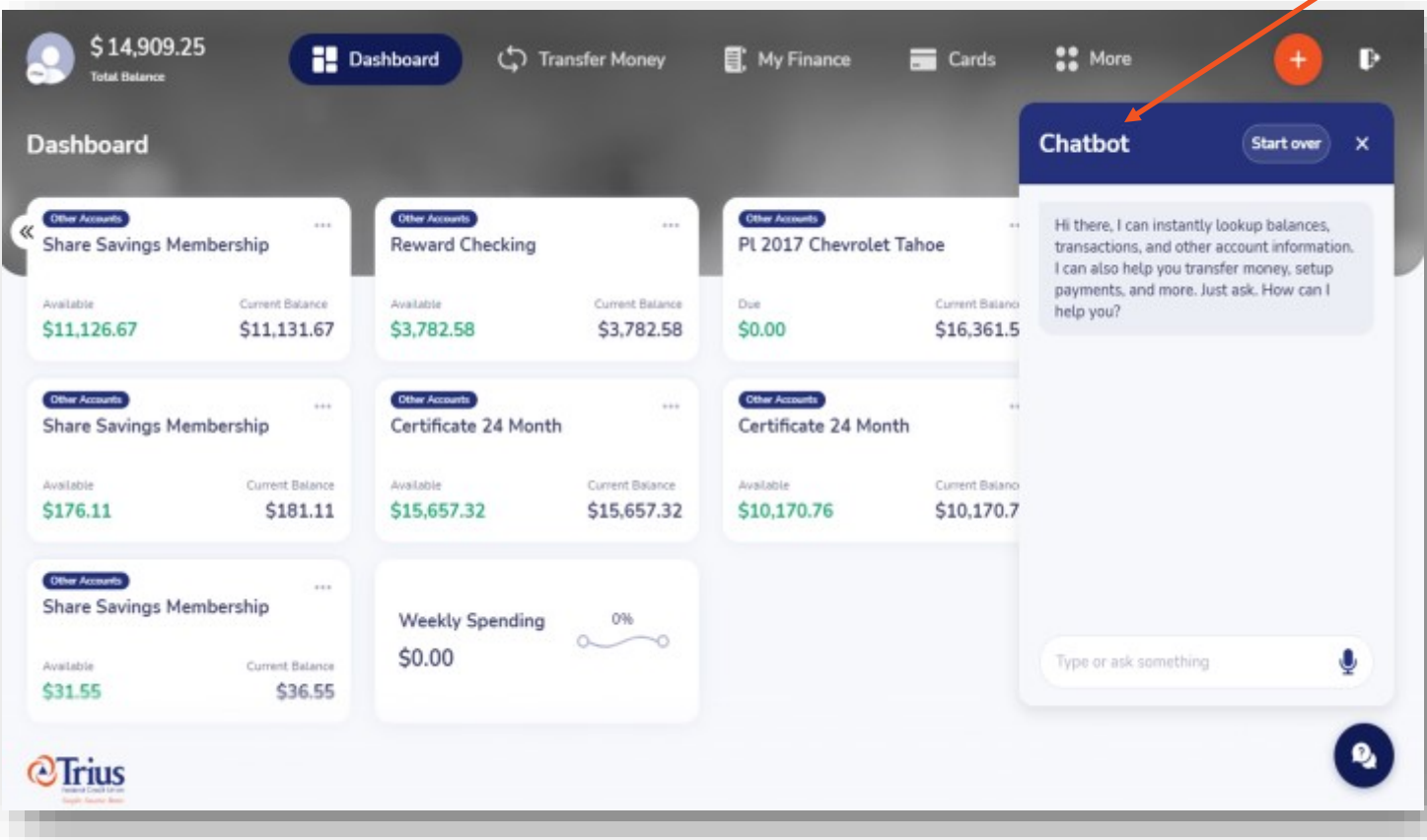
Account Details: To access account details and history on individual accounts, click the tile for the account you would like to view. You will be taken to a screen with an overview of that account with available balance, current balance, and a spending trend graphic. You can also add alerts from this page as well as print or download your transactions.



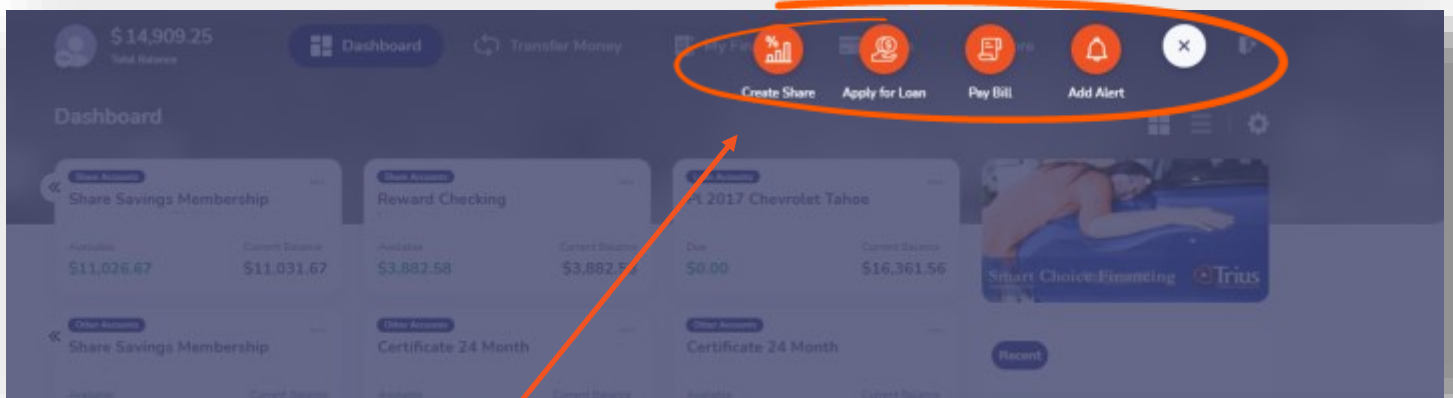
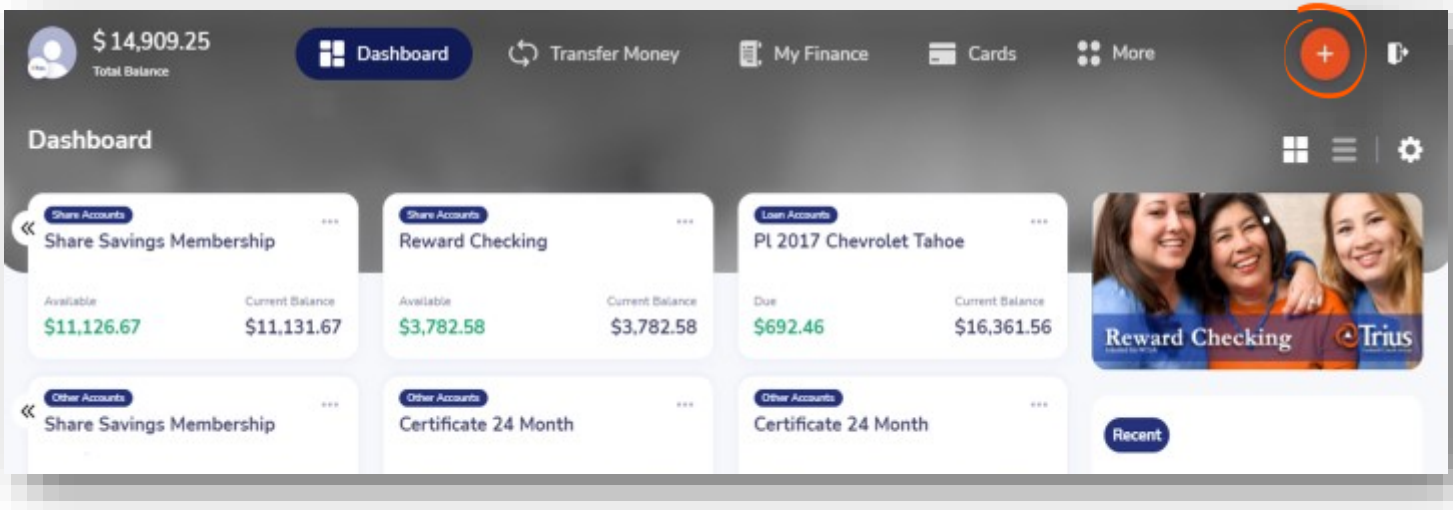
Dashboard features: When you click on the 3 dots next to each account, a box will appear with basic functions you can perform - transfer money, add alerts, hide account.



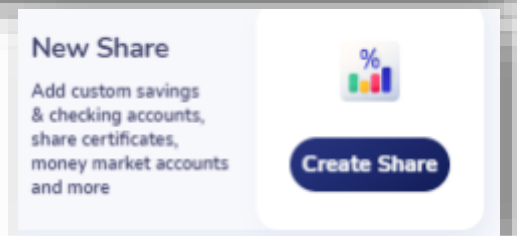
Chatbot icon: Click on this icon to get help with basic questions. A message box will appear, and you can type your request in the text box and the chatbot can assist with requests such as balances, transactions, money transfers, setting up payments, and more.



Dashboard features: When you click the on the orange **Plus Sign** icon a new menu will open with the following options.



Create Share icon: Click here and open a new share account. Or look for the **New Share** box on the dashboard screen. Then follow the prompts to open the account.



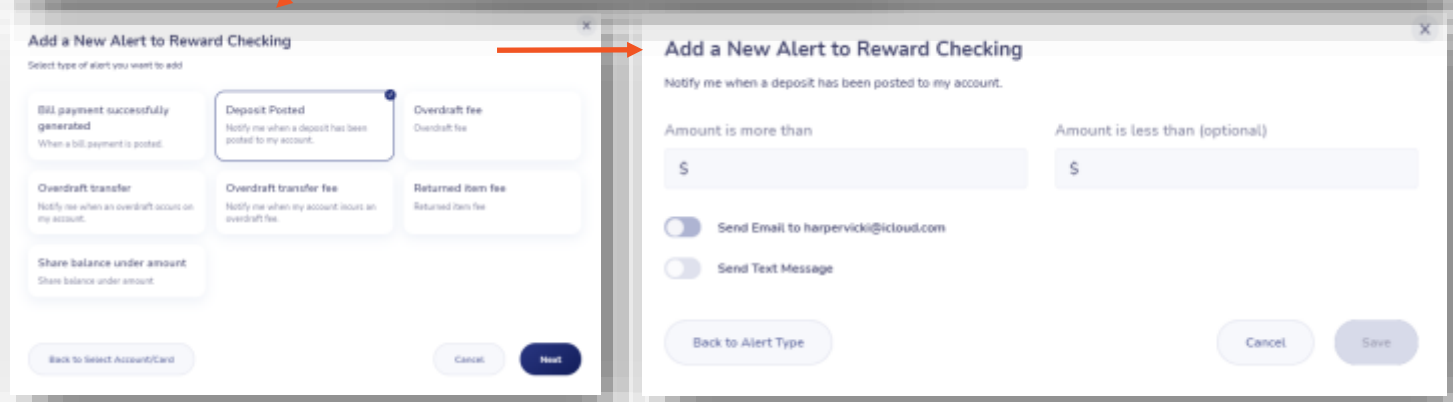
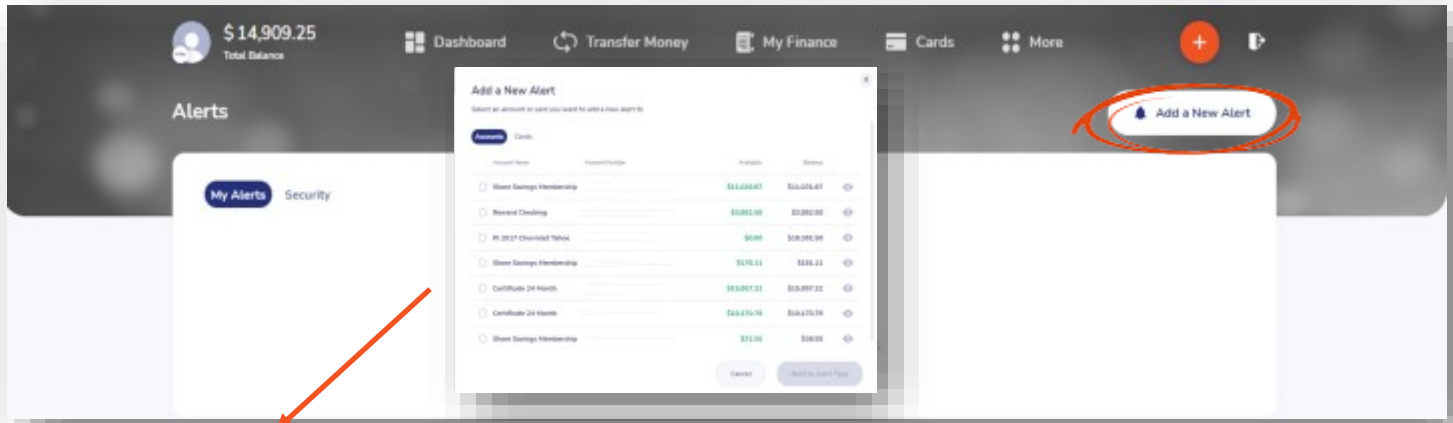
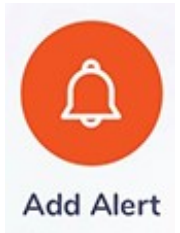
Apply For Loan icon: Click here and apply for your next loan using the online loan application. Select the items based on your situation and follow the on screen prompts. Once you submit the application a loan officer will be in contact with you. If you have any questions or concerns, please contact us.

Pay Bill icon: This icon will take you to the Trius online bill payment system. You will need to select a default account, choose a challenge question, and accept the terms and conditions to continue. If you are a current bill pay member your information will appear. If you are a new bill pay member, begin by adding a payee. [See bill pay demo.](#)

Add Alerts icon: Here you are able to add alerts to your accounts or debit cards. Click the icon and select the account. Then pick from a variety of standard alert messages applicable to your different accounts.

X icon: This icon closes the current menu and takes you back to the dashboard screen.

Add Alerts: You can add alerts to any of your accounts or to your debit cards from the **Add Alerts** icon within the **Plus Sign** icon. Once selected, a screen of accounts will appear. Click on the account (or click on the cards button to select your debit card), to setup an alert. Follow the instructions, choose your preferred notification, (email or text), then click save. Your cell phone number must be listed in your profile to activate text messages.



Available Alerts

Checking & Savings Accounts

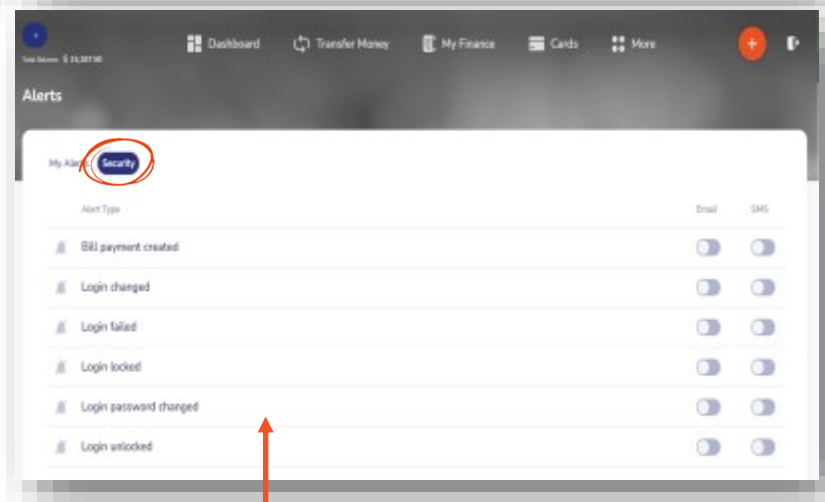
- Posting of bill payment
- Share balance under amount
- Overdrafts & fees
- Deposit posted
- And more

Debit Cards

- ATM transaction posted
- Card purchases posted
- Card declined
- And more

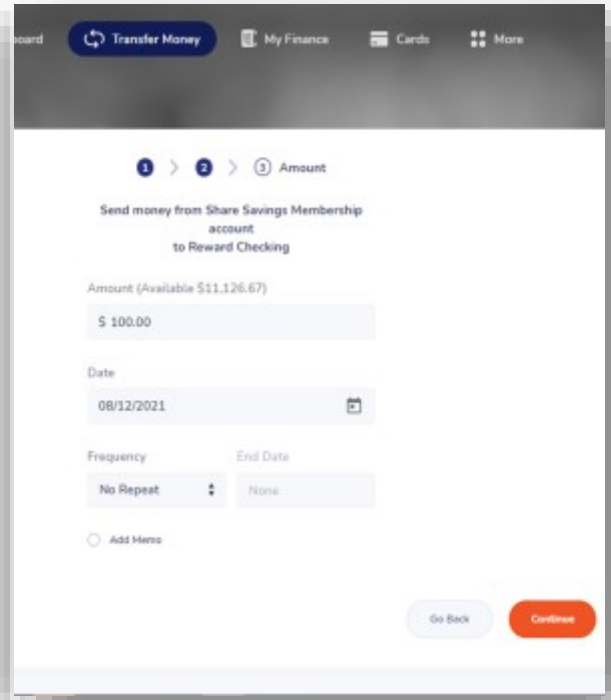
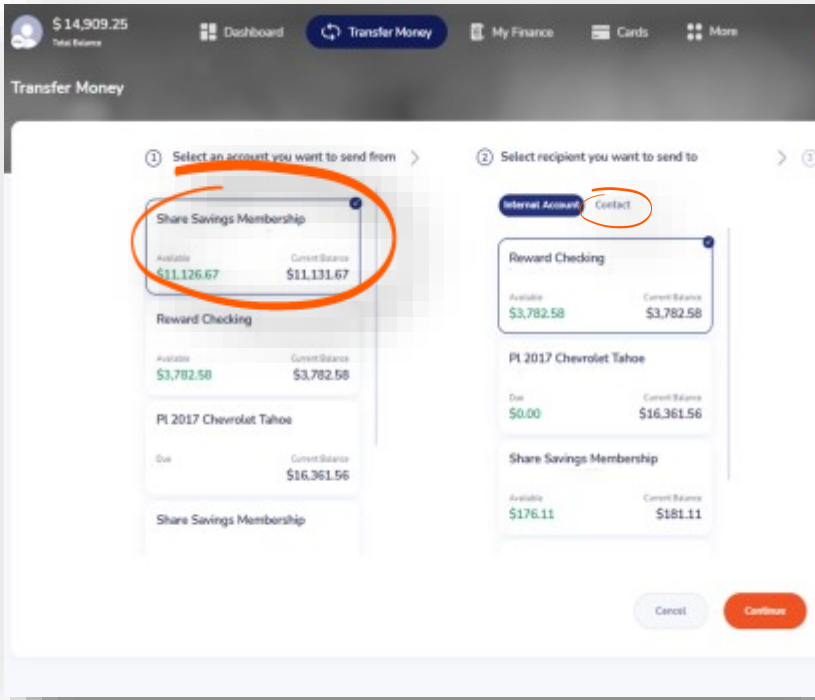
Loans

- Loan payment due
- Loan balance over amount
- Payment not received
- Payment posted
- Loan balance close to credit limit



Above are security alerts you can activate by email or text message.

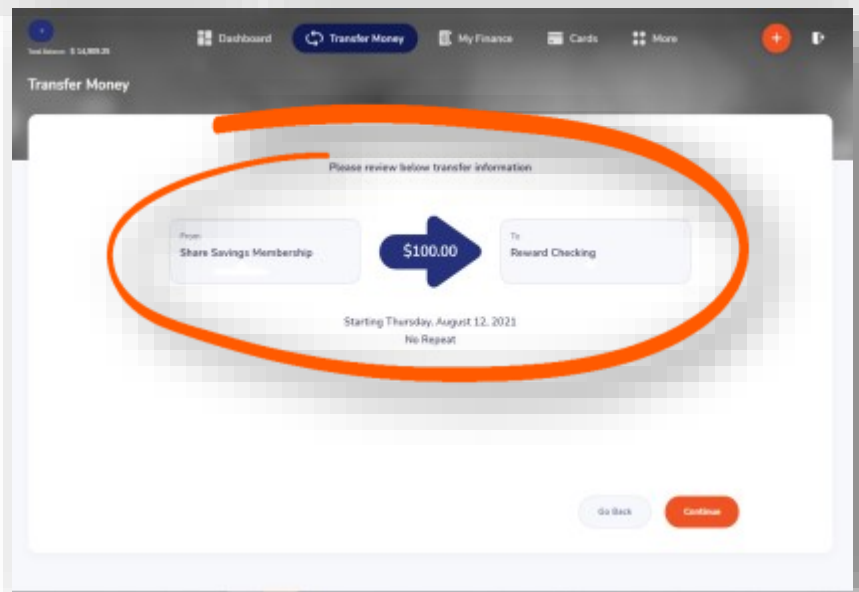
Transfer Money: Select the **transfer money** icon from the dashboard screen. Now you can transfer money between your accounts at Trius or to other Trius member accounts. Step 1 you will be prompted to select the account you would like to send the money **from**. Step 2 select the **internal account** or **contact** you want to transfer the money **to**. Select from the accounts listed. Step 3 enter, amount, frequency and memo if needed, click continue.



This screen will appear next for you to review your transfer information. Once reviewed, click continue and a confirmation screen will appear.

Transfer Money to a Contact: You have the option to transfer funds to other Trius member accounts. In step 2, select **Contact** and a list of your Recipients will appear. Continue to step 3 and complete your transfer.

To add a contact to your list you will need to add them to your **Recipients** tab. See page 10 for instructions.



My Finance: The **My Finance** icon at the top of the dashboard screen includes several convenient features.

Loans Due tab

- View loan and credit card payments due, as well as the date and amount due
- Use the handy **Pay Now** button to transfer funds to make your payment
- Search by name or category
- This screen also includes a print function

Scheduled Transfers tab

- View and manage your scheduled transfers on this screen
- Search by name or category

History tab

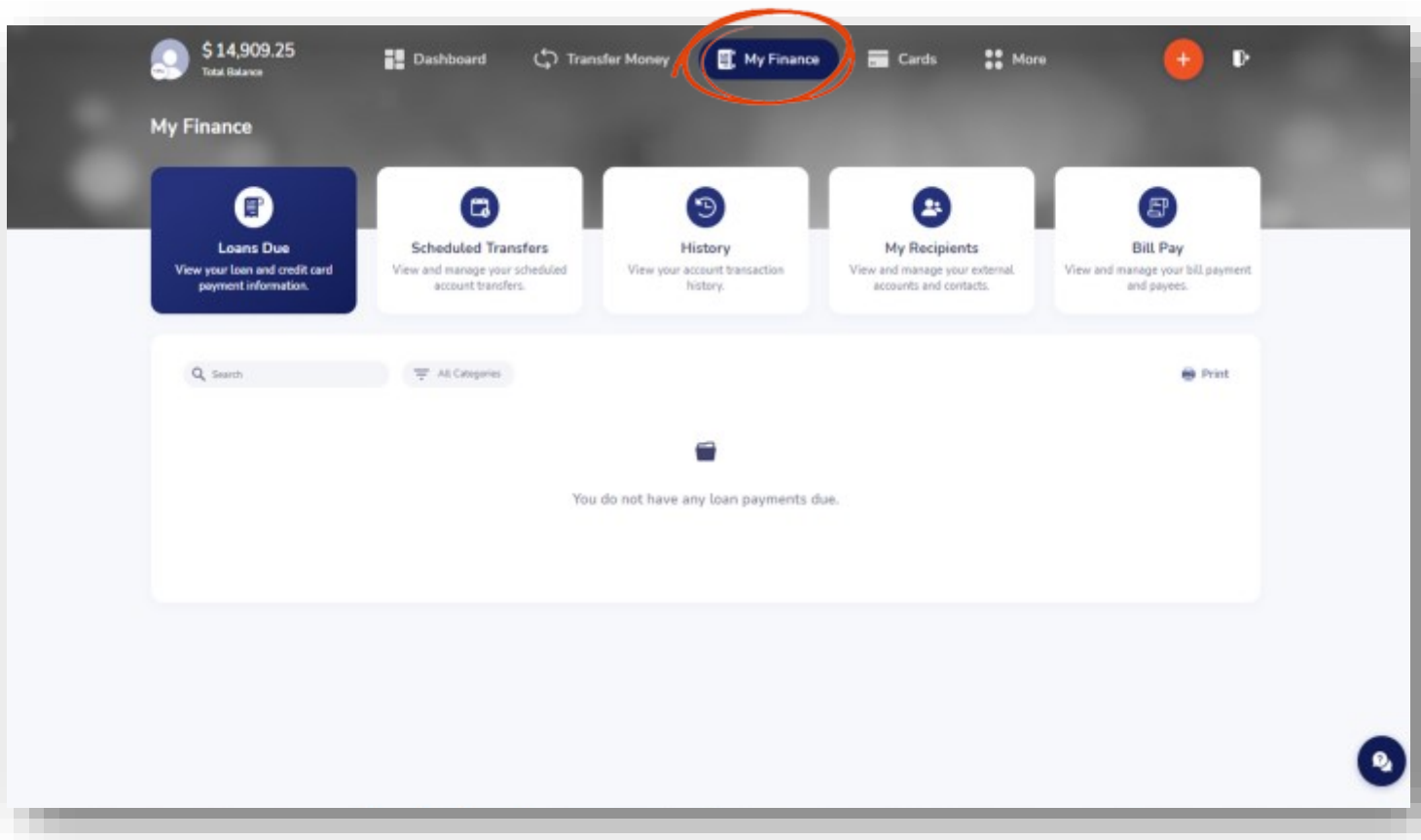
- View all your transaction history
- Print or download a CSV file using a date range
- Search by name, category or date

Recipients tab

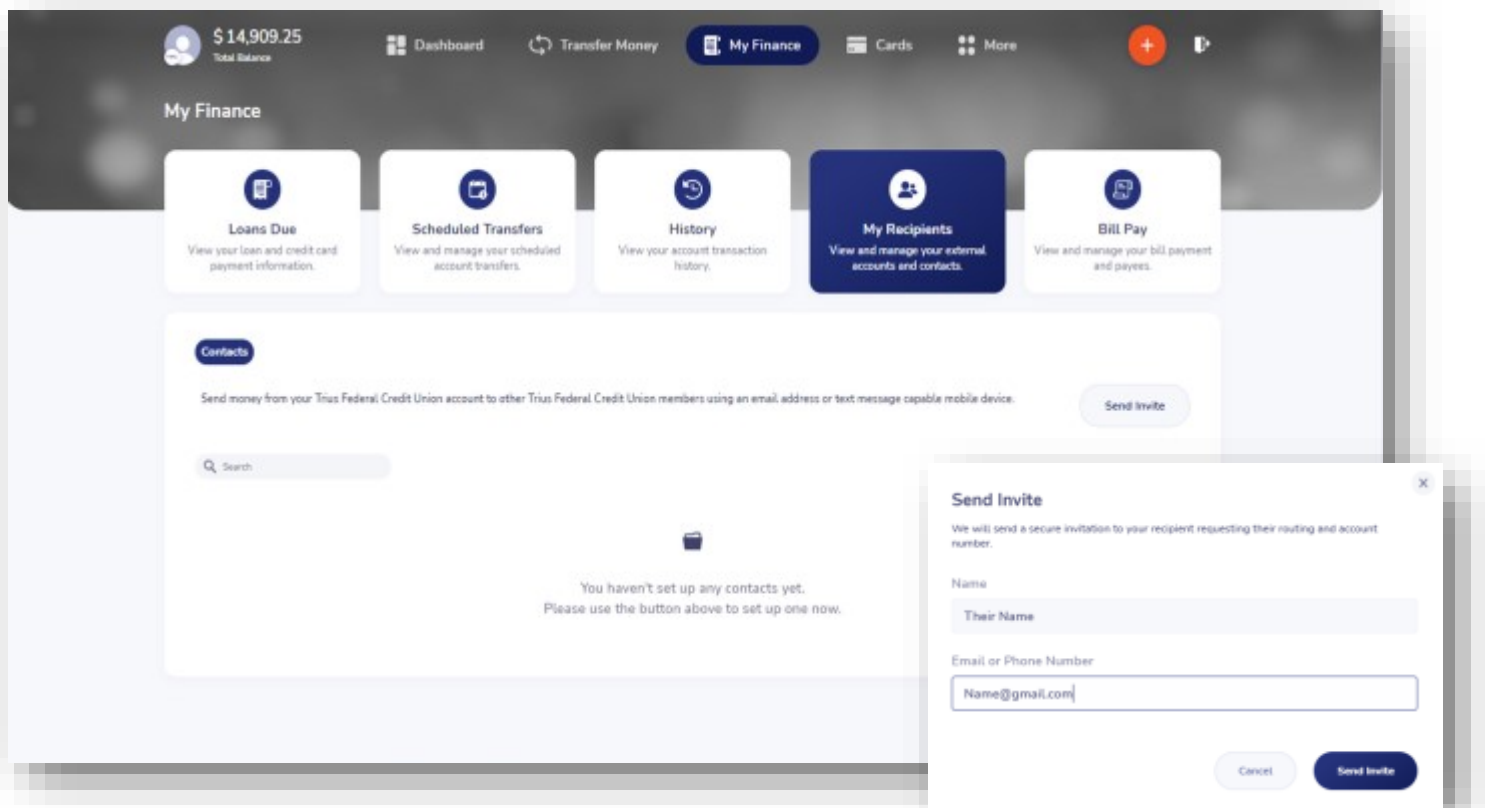
- View & manage your Trius member contacts
- See page 10 for details

Bill Pay tab

- View and manage your bill payments and payees
- Register your bill pay default account
- Access the bill pay site



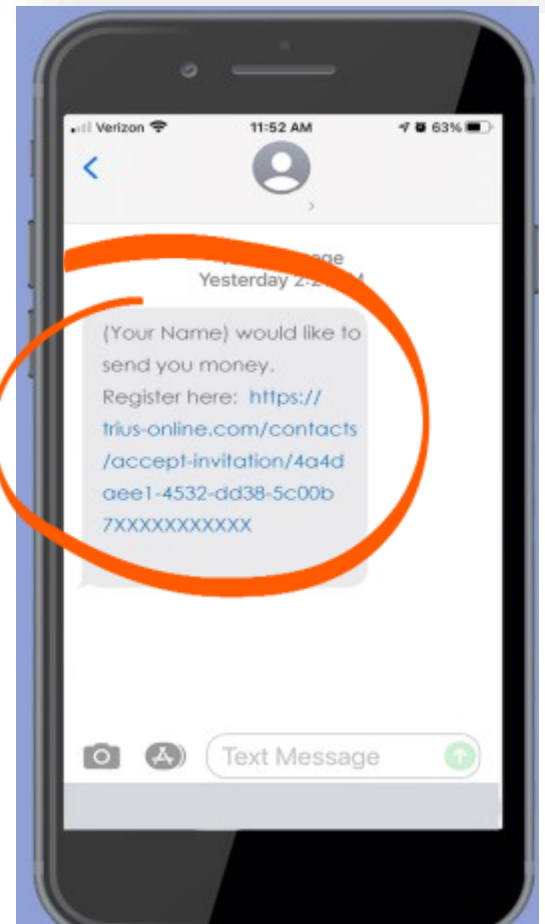
My Recipients tab: This feature allows you to view and manage your contacts. The contacts function within the **Transfer Money** tab allows you to transfer funds directly to other Trius member accounts.



You will need to setup your **Contacts** first. Click **send invite**. Enter their name, and email or text capable mobile number, in the pop-up box. Then click **send invite again**.

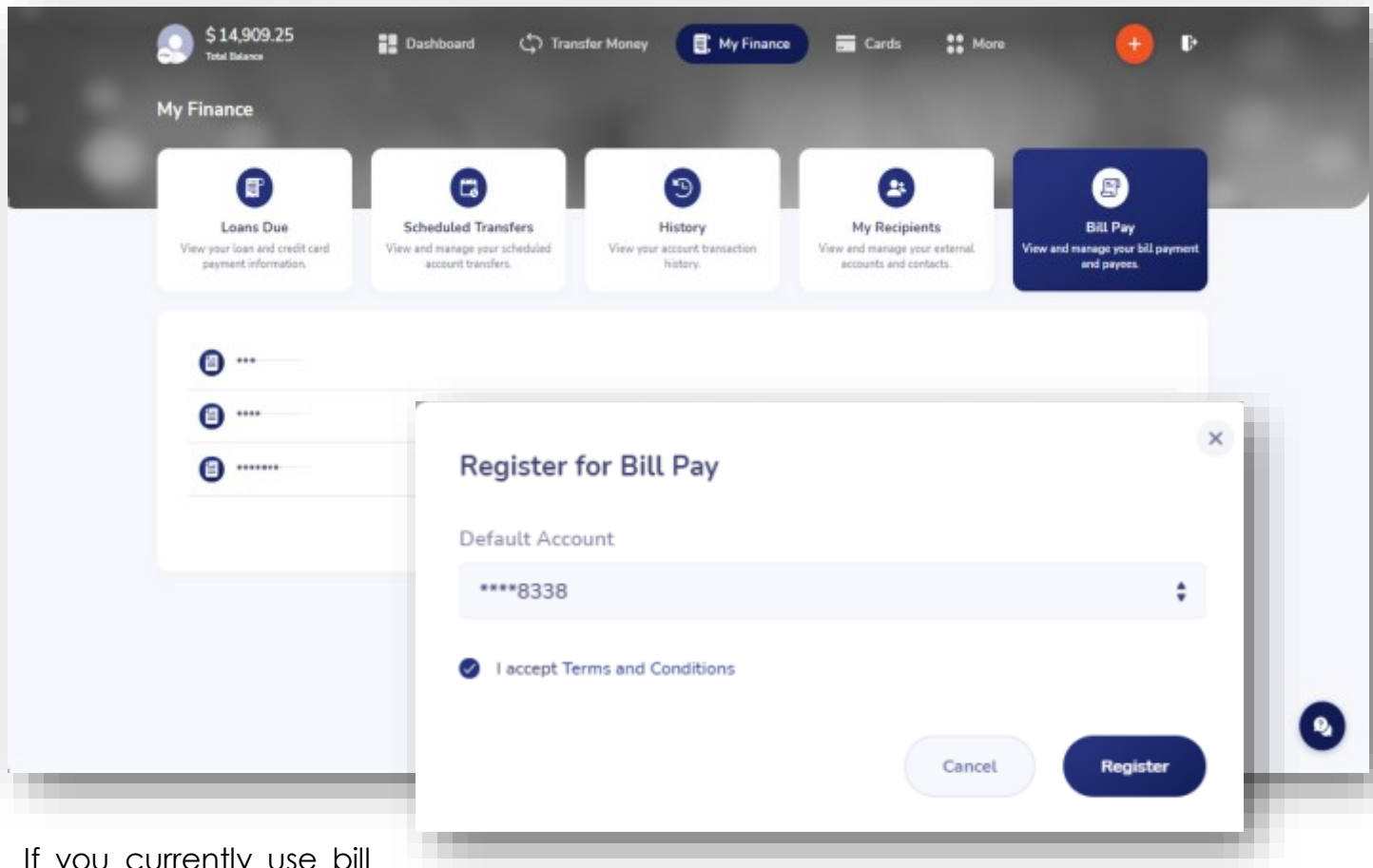
The Trius member will receive an email or text with your message. Your contact must click the link and follow the prompts in order to be added as a contact on your account. The recipient name will show as pending until they register using the link. You will have the option to edit or delete recipients once added. Currently this option is only available to Trius members. Enhancements to this option may be made in future releases.

You may also use the bill pay system to send money to non-Trius members. Simply select the pay-a-person option.



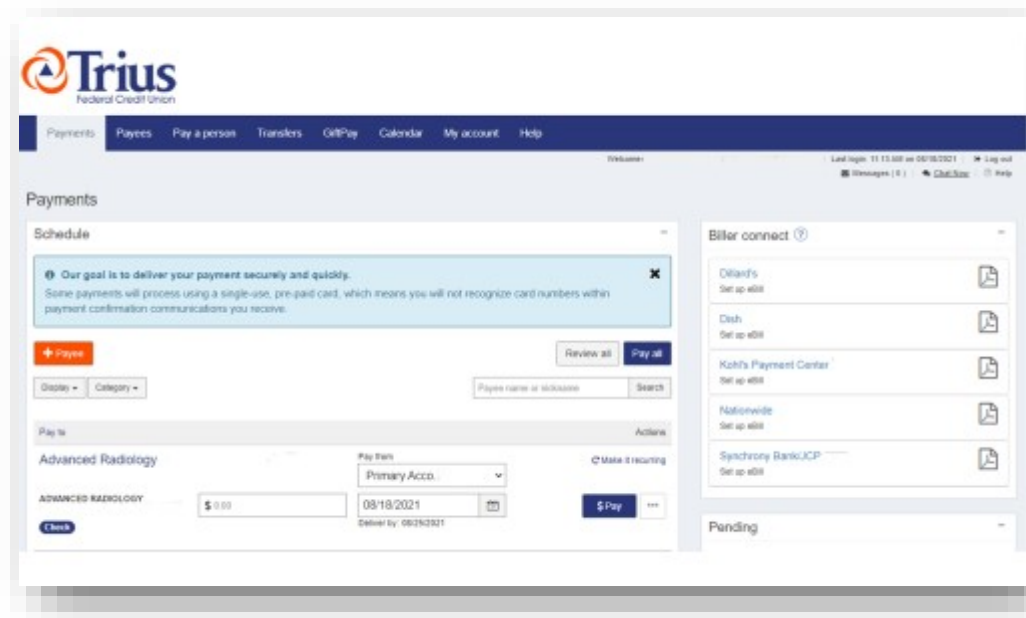
Bill Pay tab: View and manage your bill payments and payees. The first time you use bill pay you will need to register your default account. Select the account from the list. Select a challenge question. Click on I accept the terms and conditions. Then click register.

You may register more than one account. When processing a payment your default account is automatically selected. If you want to pay from a different account select it from the pay from drop down menu.

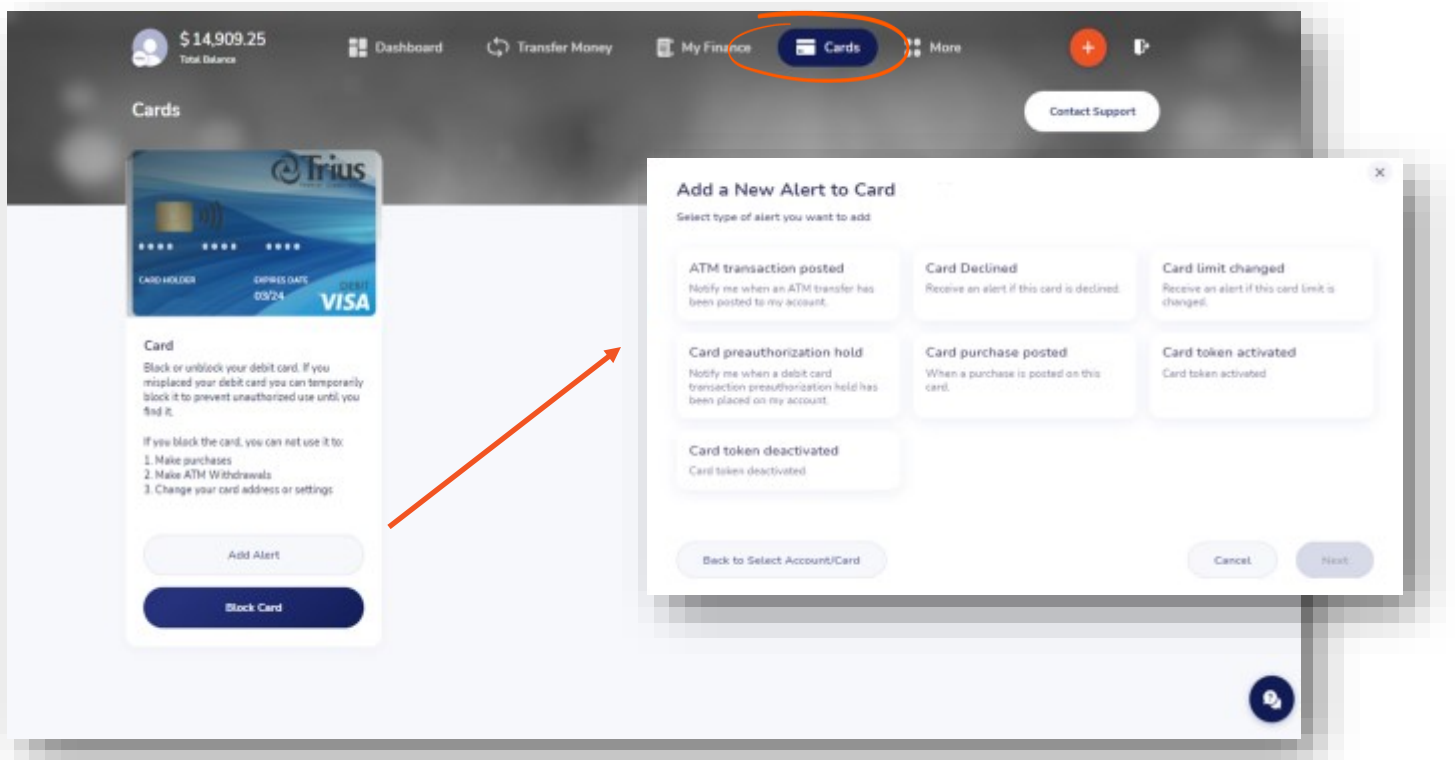


If you currently use bill pay, all your information is unchanged.

If you do not use bill pay, this is a great time to start. Check out the bill pay [demo](#).

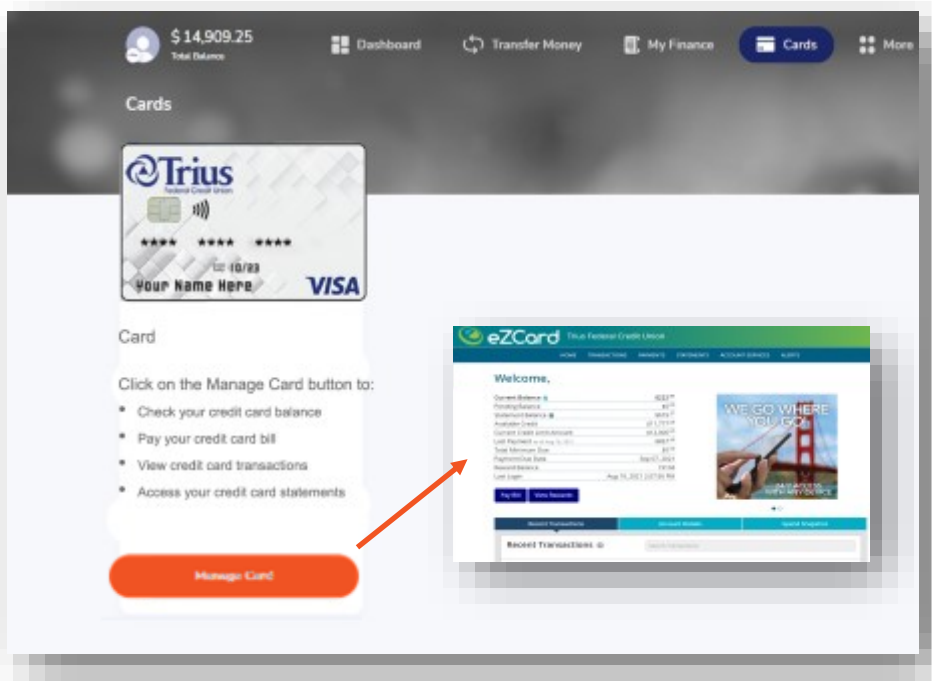


Cards: The **Cards icon** on the dashboard will provide you with the ability to manage your card accounts, both your Trius Visa debit card and your Trius Visa Platinum credit card. First click on the cards icon at the top of your screen, then click on or hover over the card account you want to view.

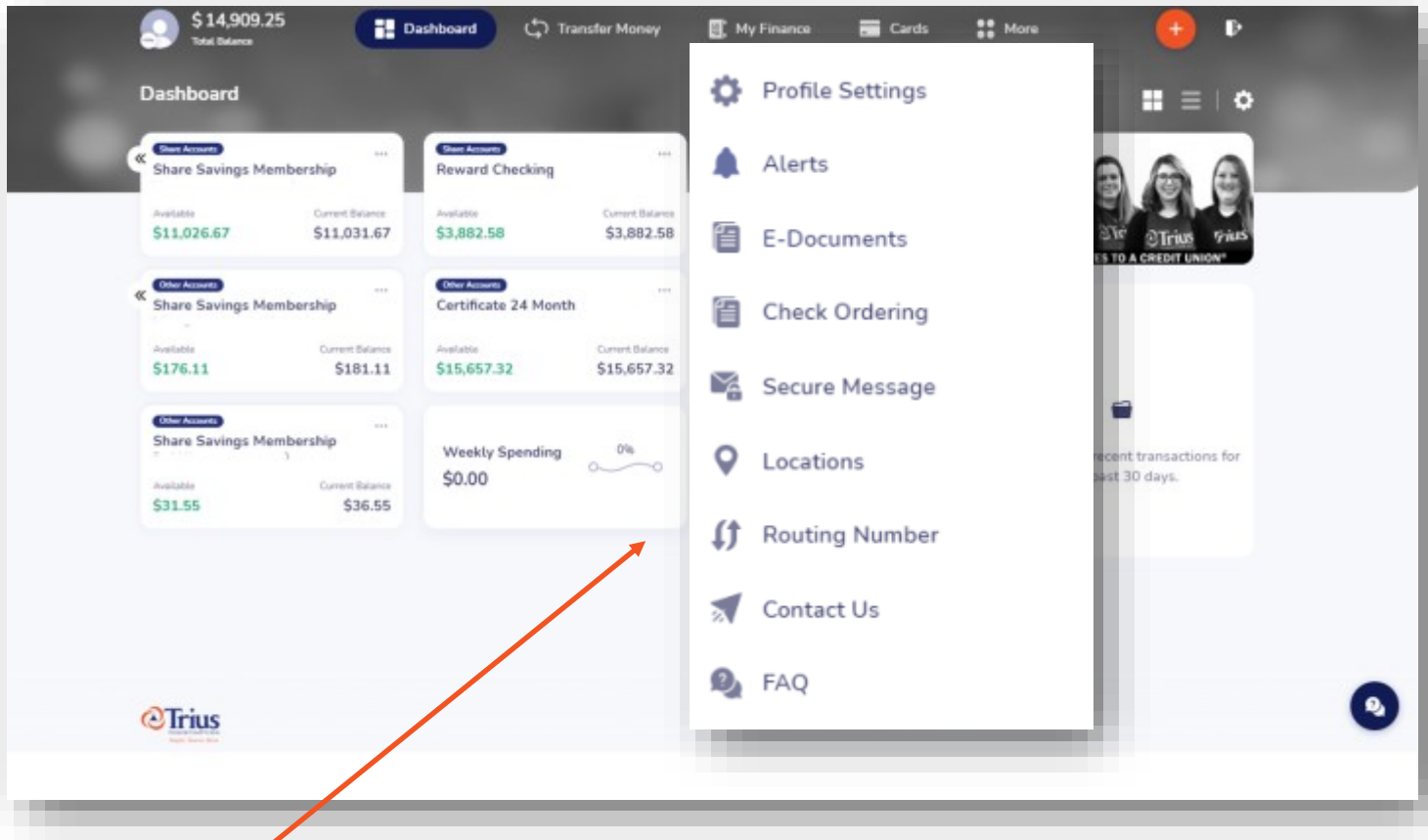


Debit Card Options: When you select your debit card, you will have the option to block or unblock your card. You can also add alerts from this screen. Select an alert from the screen and the message method as well as other details applicable to the alert and click save.

Credit Card Options: When you click on your Trius Visa credit card you have the option to click on **Manage Card** which will take you to the **eZ-Card** management portal so that you can view transactions, your statement, make a credit card payment, view your rewards, and more.



More: The **More icon** on the dashboard opens a menu with a variety of options to help personalize your online banking experience. See the descriptions below.



Profile Settings: View your personal profile information and update your email, phone number, address, and change your password. You can also add a profile picture. This is the same information that is found using the dashboard **Profile icon**.

Alerts: Add alerts to any account or debit card. Be sure to update your profile to include your cell phone number.

E-Documents: View electronic statements and notices and enroll in e-statements and e-notices.

Check Ordering: Select an account that you want to order checks for and you are re-directed to the Harland Clarke site to order checks.

Secure Message: Send Trius a secure message with any questions you may have.

Locations: View our location addresses, and find local Shared Branching locations.

Routing Number: A pop-up box appears with the Trius Federal Credit Union routing number.

Contact Us: A pop-up box appears with an option to click to call or email Trius.

FAQ: You will be taken to the general frequently asked questions on our website.



Overview & User Guide is subject to change without notice. It is intended to provide basic information and it is not a complete step-by-step instruction manual. Please follow the on-screen prompts for the most up-to-date instructions.