

A quick and easy guide to using  
**Columbia Connect**  
for personal digital banking.

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# Getting Started

Welcome to Columbia Connect, our digital banking platform! Whether at home or at the office, from a mobile phone, tablet or laptop, we strive to make your online banking experience easy and convenient.

You can navigate this guide by clicking a topic or feature in the Table of Contents. Each section provides an overview and steps to help you during the online banking process. If you have additional questions, contact us at 877-754-5074.



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# Getting Started

## New User Enrollment

If you're new to Columbia Connect, you need to complete the enrollment process the first time that you log in. Once you complete these few quick steps, you'll be on your way to banking everywhere you go!

1. Type ColumbiaBank.com into your browser and click the "Enroll" link.
2. Fill out the Registration form with the required information and click the **Continue** button.



**Note:** The details you provide are verified by comparing them to the information we have on file in our system. If you experience issues completing this step, please contact us at 877-754-5074 for assistance.

3. A confirmation message appears.
4. Choose the contact method that allows Columbia Bank to reach you immediately with a Secure Access Code (SAC). This numbered code is only valid for a short time, and if it expires, you will need to request a new one. If you close your browser before receiving the SAC, you can log in again and select the **I already have a Secure Access Code** button.
5. Enter the SAC and click the **Submit** button.
6. Choose whether you wish to register your device for future logins. If you click the **Register Device** button, you will never need to request SACs for that device.
7. Create your new password.
8. Review the Online & Electronic Terms and Conditions Agreement on the Disclaimers page and click the **I Accept** button to agree to the terms and conditions.
9. Congratulations! You have successfully logged in to Columbia Connect! If you have any questions or concerns, call us at 877-754-5074.



**Note:** For additional security, we strongly suggest that you do not register your devices.

# Getting Started

## Logging In

After your first-time enrollment, logging in is easy and only requires your user ID and password. If you are logging in using a device that you have not previously registered, you will need to request a Secure Access Code (SAC).

The screenshot shows the Columbia Bank online banking login interface. At the top, there is a navigation bar with links for 'personal', 'business', 'wealth management', 'resources', 'about', and 'contact', along with search and location icons. The main content area features a 'personal' dropdown menu, a 'user id' input field, and a 'Log In' button. A large banner reads 'Columbia Connect is here!' with a sub-headline 'Introducing our new and improved personal digital banking platform.' Below this, there is a 'Password' input field and a 'Submit' button. A 'Forgot your password?' link is also present. A red notification box at the bottom left states 'Personal online banking and bill pay will experience temporary interruptions. Read more.'

1. Enter your user ID.
2. Click the **Log In** button.
3. Enter your password.
4. Click the **Submit** button.



**Note:** If you enter an incorrect password too many times, your account will be temporarily locked. Call us at 877-754-5074 for assistance.

## Logging Off

For your security, you should always log off when you finish your online banking session. We may also log you off due to inactivity.

1. Click the **Log Off** tab in the navigation menu.
2. Close your internet browser.



# Getting Started

## Resetting A Forgotten Password

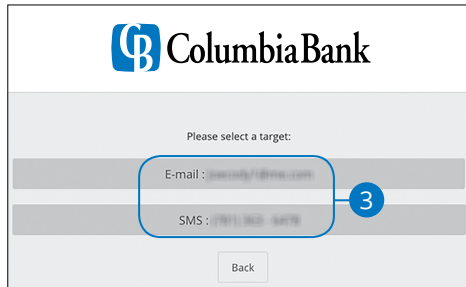
If you happen to forget your password, you can easily reestablish a new one.

The image shows two screenshots of the Columbia Bank online banking interface. The top screenshot is the login page, titled "online banking login". It prompts the user to "Select your online banking system:" with a dropdown menu currently set to "personal". Below this is a "user id" input field. At the bottom of the login form are two buttons: "enroll" and "log in". A blue circle with the number "1" is positioned to the left of the "log in" button. The bottom screenshot shows the Columbia Bank logo at the top. Below the logo is a "Password" input field. To the right of the password field is a link that says "Forgot your password?". A blue circle with the number "2" is positioned to the right of this link. Below the password field and the link is a "Submit" button.

1. Enter your user ID and click the **log in** button.
2. Select the link "Forgot your password?"

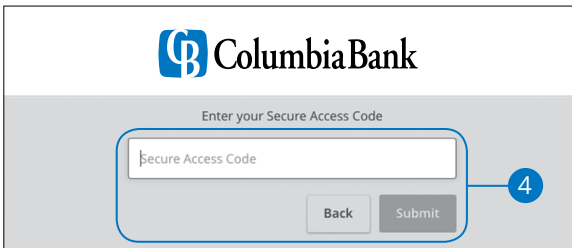


**Note:** You may not be able to change your password if your account is locked, or if you are resetting your password from an unregistered device.



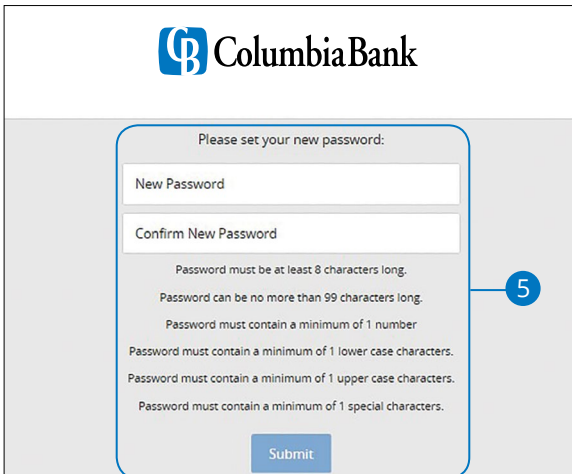
The screenshot shows the Columbia Bank login page. At the top is the Columbia Bank logo. Below it, the text "Please select a target:" is displayed. There are two input fields: "E-mail : jessica.f@mc.com" and "SMS : (781) 862-3478". A blue circle with the number "3" is positioned to the right of the SMS field. At the bottom center is a "Back" button.

3. Choose the contact method that allows Columbia Bank to reach you immediately with a 6-digit Secure Access Code (SAC).



The screenshot shows the Columbia Bank login page with the heading "Enter your Secure Access Code". There is a text input field labeled "Secure Access Code". Below the field are two buttons: "Back" and "Submit". A blue circle with the number "4" is positioned to the right of the "Submit" button.

4. Enter the SAC and click the **Submit** button.



The screenshot shows the Columbia Bank login page with the heading "Please set your new password:". There are two text input fields: "New Password" and "Confirm New Password". Below the fields are several password requirements listed in a list format: "Password must be at least 8 characters long.", "Password can be no more than 99 characters long.", "Password must contain a minimum of 1 number", "Password must contain a minimum of 1 lower case characters.", "Password must contain a minimum of 1 upper case characters.", and "Password must contain a minimum of 1 special characters.". At the bottom center is a "Submit" button. A blue circle with the number "5" is positioned to the right of the "Submit" button.

5. Create a new password based on our password requirements and click the **Submit** button when you are finished.

# Home Page

## Home Page Overview



After logging in, you are taken directly to the Home page. This page is divided into three convenient sections to help you navigate to every feature within Columbia Connect. Here you can view balances in your Columbia Bank accounts, see your account summaries and more!

The screenshot shows the Columbia Bank Home Page interface. The page is divided into several sections:

- Navigation Menu (A):** A vertical sidebar on the left containing links for Home, Move Money, Make Transfers, Pay Bills, Statements, Services, Settings, Messages, Locations, Contact Us, Privacy Policy, Help, and Log Off.
- Welcome Banner (G):** A top banner with the text "Welcome to Columbia Connect, our new and improved personal digital banking platform." and a "Transfer Money Now" button.
- Accounts Section (B, C, D, E):** A section titled "Accounts" showing a list of accounts. One account is highlighted with a balance of \$5.90 and a masked account number XXXXX3708. It includes buttons for "Quick Transfer" and "View Activity".
- New Group Section (F):** A section titled "New Group" showing a "Prime Checking" account with an available balance of \$13.65 and account number XXXXX3716.
- Asset Summary Section:** A section titled "Asset Summary" featuring a donut chart showing 30% Total Assets (\$20) and 70% Total Assets. Below the chart is a "Prime Checking" account summary for XXXXX3716, showing an available balance of \$13.65 and account number XXXXX3716.
- Mobile Deposit History Section:** A section titled "Mobile Deposit History" with a search bar and buttons for "All", "Submitted", and "Accepted". It shows "No History Available".
- Unified User Experience Section:** A section titled "UNIFIED USER EXPERIENCE" with a sub-header "No matter how you access your personal accounts, via desktop, mobile phone or tablet, your new digital banking experience will be robust and consistent across every device."

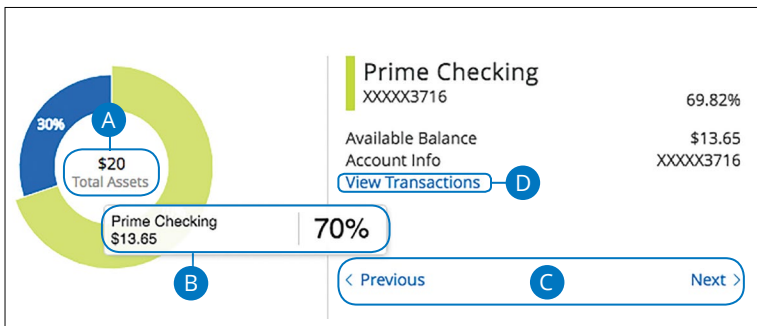


**Note:** The letters in the image above correspond to the available features on the Home page listed out below.

- A. The navigation bar appears in every view on the left side of the screen. You can navigate to any of Columbia Connect's features by selecting the appropriate drop-down tab.
- B. Your Columbia Bank accounts are displayed on an account card with its balance.
- C. If you click an account name, you are taken to the Account Details page. You can also click the right side of an account card and click the **View Activity** button for more details.
- D. The  icon allows you to print a summary of current available funds in your accounts.
- E. You can expand or collapse account details by clicking the  icon.
- F. If you click and hold an account card, you can drag and drop it to a new location to change the order in which your accounts appear.
- G. The Quick Actions links in the top right corner let you quickly access different Online Banking features.

## Account Summary Overview

If you ever need to quickly assess how much money is in all of your accounts, you can scroll down to the Account Summary graphic on the Home page. This interactive chart represents your total assets, represented by specific colors and percentages.



- A. The Total Assets widget gives you the total amount of money in your accounts and breaks down those funds into percentages.
- B. Each colored piece represents one of your Columbia Bank accounts and displays its percentage of total funds, as well as the balance.
- C. Clicking "Next" or "Previous" lets you view different accounts and details.
- D. You can click the "View Transactions" link for more information.

# Home Page

## Account Details Overview

Selecting a Columbia Bank account on the Home page takes you to the Account Details page, where you can view every transaction pertaining to that account. From here, you can view details such as type of transaction, check images and account balances so you stay organized and on top of your finances.

**Commercial Checking 6789**  
Available Balance **\$7,800.88**  
Current Balance **\$7,800.88**

**Regular Checking 2431**  
Available Balance **\$7,789.19**  
Current Balance **\$7,789.19**

<
Consumer Checking 1234

B
\$1,750.32  
Available Balance

C

D
Filters

E
Details

F

🗨️
🖨️
📄

TIME PERIOD

TRANSACTION TYPE

MIN AMOUNT

MAX AMOUNT

CHECK #

▼

Posted ▼

\$0.00 to

\$0.00

to

CATEGORY

▼

Reset

Apply Filters

G

Date	Description	Amount
DEC 9 2016	Wendy&#39;s Fast Food	-\$11.94
DEC 9 2016	Charter Communications Utilities	-\$73.23
DEC 9 2016	Regular Debit Transaction Uncategorized	-\$682.72
DEC 9 2016	Regular Debit Transaction Uncategorized	-\$718.52
DEC 9 2016	Check #1175 Check	-\$38.94

H

I

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🖨️

**Transaction**

Summary

Category:  
Check

Online Description:  
Check #1175

Statement Description:  
Check #1175









Date:  
12/09/16 12:00 AM

Type:  
Debit - Check 1175

Previous    1 of 2    Next

Home Page: Account Details Overview

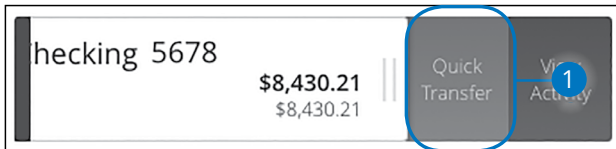


- 
- A. On the Home page, you can click on an account name to view the Account Details screen. You can also click the right side of an account card and click the **View Activity** button.
  - B. The available balance of that account is displayed in the top right corner.
  - C. You can find transactions within that account using the search bar.
  - D. Transactions can be sorted by time, type, amount or check number. Click the  **Filters** icon for more options.
  - E. More information about your transactions is available by clicking the  **Details** icon.
  - F. The  icon lets you send a secure message about that account. You can also print a list of transactions by clicking the  icon or export your transactions into a different format by clicking the  icon.
  - G. The  icon indicates how the Date, Description and Amount columns are sorted.
  - H. You can view more details about a transaction by clicking on it.
  - I. After clicking a transaction, the  icon lets you send a secure message about that transaction. You can also print the transaction by clicking the  icon.

# Home Page

## Quick Transfer

No need to run to a branch to move money from one account to another! If you're ever in a rush, the Quick Transfer option provides you with a simple way to complete those transactions.

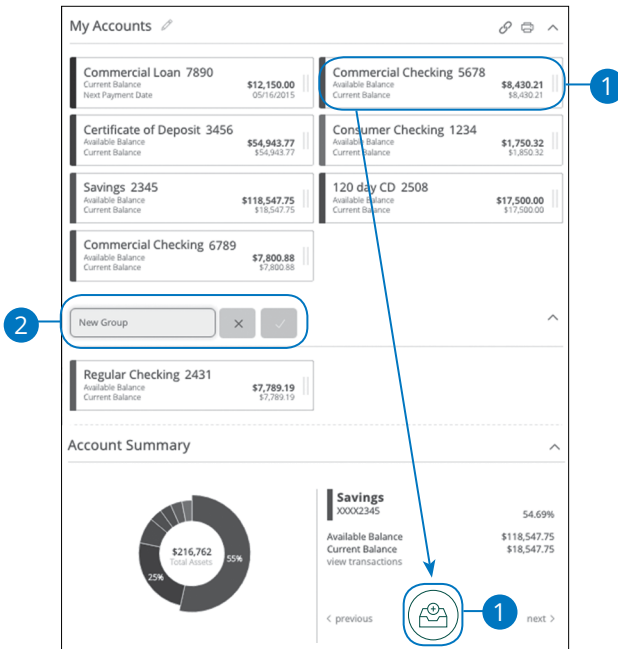



1. Choose an account to transfer funds from by clicking the right side of the account card then clicking the **Quick Transfer** button.
2. Select the “To” drop-down and choose an account to receive the funds.
3. Enter an amount to transfer.
4. (Optional) Click the “Advanced Options” link to be redirected to the Funds Transfer feature.
5. Click the **Transfer Funds** button when you are finished.

# Home Page

## Account Grouping

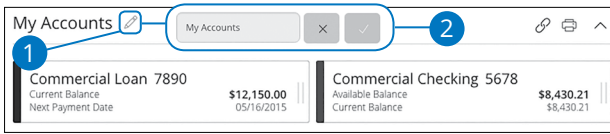
You can organize your accounts into groups, so the Home page appears how you want it and in a way that makes sense to you.




1. Create a new group by clicking and holding an account tile, then dragging and dropping it to the  pop-up icon.
2. Create a group nickname and click the **check mark** button when you are finished.

## Editing a Group Name

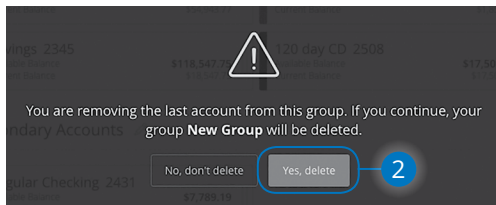
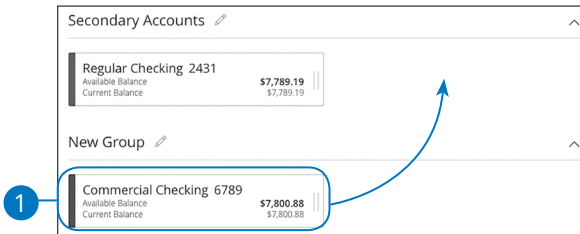
The names of existing groups can be edited in just two easy steps.



1. Click the  icon to edit your group nickname.
2. Enter a new name and click the **check mark** button when you are finished.

## Deleting a Group

After a group is made, you can reorganize the Home page by deleting a group without removing those accounts from the Home page.



1. Remove all accounts from a group by clicking and holding an account tile and dragging it to another group and dropping it.
2. Click the **Yes, delete** button to delete the group.

# Security

## Protecting Your Information

Here at Columbia Bank, we do all we can to protect your digital information and provide you with a dependable online experience. However, we rely on you to take further precautions to assure the safety of your accounts. By following our tips, Columbia Connect can be a secure and efficient resource for all your banking needs.

### General Guidelines

- Make sure your operating system and antivirus software are up-to-date.
- Always use secure wireless (WiFi) networks that require a user ID and password.
- Never leave your computer or mobile device unattended while using Columbia Connect.
- Monitor your recent account history for unauthorized transactions.
- Always log off when you're finished and close the browser or mobile app.

### User ID and Password

- Create strong passwords by using a mixture of upper and lowercase letters, numbers and special characters.
- Do not create passwords containing your initials or birthday.
- Change your passwords periodically.
- Memorize your passwords instead of writing them down.
- Only register personal devices and avoid using features that save your user IDs and passwords.

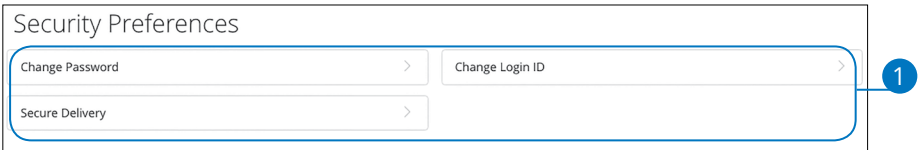
### Fraud Prevention

- Do not open email attachments or click on links from unsolicited or unknown sources.
- Avoid giving out personal information on the phone or through email.
- Shred unwanted sensitive documents including receipts, checks, deposit slips, pre-approved credit card offers and expired cards.
- Act quickly. If you suspect your financial information is compromised, call us immediately at 877-754-5074.

# Security

## Security Preferences

We take security very seriously at Columbia Bank. Because of this, we've added various tools to help you better protect your account information. You can add and manage these features in Security Preferences to strengthen your digital banking experience.



### Change Password

When you need to, you can change your password within Columbia Connect. We recommend that you change your password regularly and follow our guidelines for creating a strong password.

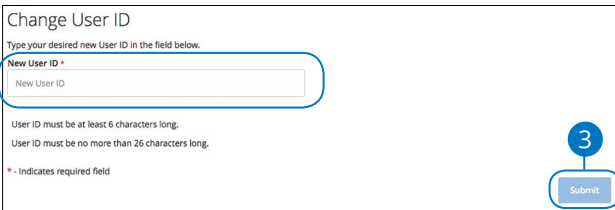
 A screenshot of the 'Change Password' form. The form has three input fields: 'Old Password \*', 'New Password \*', and 'Confirm New Password \*'. Below the fields are instructions: 'The New Password and Confirm New Password fields must match', 'Password must be at least 8 characters long.', 'Password can be no more than 99 characters long.', 'Password must contain a minimum of 1 number', 'Password must contain a minimum of 1 lower case characters.', 'Password must contain a minimum of 1 upper case characters.', and 'Password must contain a minimum of 1 special characters.' A legend indicates '\* - Indicates required field'. A 'Change Password' button is at the bottom right. Numbered callouts 2, 3, 4, and 5 point to the input fields and the button respectively.

In the **Settings** tab, click **Security Preferences**.

1. Click the **Change Password** button.
2. Enter your old password.
3. Create a new password.
4. Reenter your new password.
5. Click the **Change Password** button when you are finished making changes.

## Change User ID

You can also change your user ID at any time. To ensure that you create an accepted user ID, please follow the required ID guidelines shown below.



The screenshot shows a form titled "Change User ID". At the top, it says "Type your desired new User ID in the field below." Below this is a text input field labeled "New User ID \*". A blue circle with the number "2" is positioned to the left of the input field, with a line pointing to the field. Below the input field, there are two lines of text: "User ID must be at least 6 characters long." and "User ID must be no more than 26 characters long." Below that is a small asterisk with a line pointing to the input field, followed by the text "\* - Indicates required field". In the bottom right corner of the form, there is a blue "Submit" button. A blue circle with the number "3" is positioned above the button, with a line pointing to the button.

In the **Settings** tab, click **Security Preferences**.




1. Click the **Change User ID** button.
2. Enter your new user ID.
3. Click the **Submit** button when you are finished making changes.

## Secure Delivery

Columbia Bank verifies your identity using Secure Access Codes (SACs), which are numbered codes sent to you by email, phone or text. Within Security Preferences, you can make changes to your delivery preferences or add new ways for us to contact you.

The screenshot shows the 'Secure Access Code Delivery Information' form. At the top, it says 'Enter your preferred email and/or phone contact information below. This contact information will be used for Secure Access Code delivery.' Below this is a text input field containing 'diana@mcompany.com'. To the right of the input field are edit and delete icons. A blue circle with the number '2' points to this area. Below the input field is a note: '\* - Indicates required field'. To the right of the note are three buttons: 'New Email Address', 'New Phone Number', and 'New Text Number'. A blue circle with the number '4' points to these buttons. Below the main form is a second form with an 'Email' label and an input field containing 'johndoe@gmail.com'. To the right of this input field are save, add, and delete icons. A blue circle with the number '3' points to the save icon.

In the **Settings** tab, click **Security Preferences**.

1. Click the **Secure Delivery** button.
2. Make changes to a secure delivery method by clicking the  icon to make changes or the  icon to delete a secure delivery method.
3. Enter your new contact information and click the  icon when you are finished to save your changes.
4. Add a new delivery contact by clicking either the **New Email Address**, **New Phone Number** or **New Text Number** button at the bottom of the page.



# Security

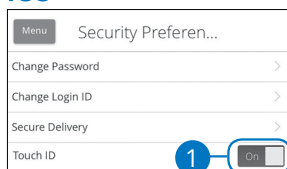
## Mobile Security Preferences

Within Columbia Bank's app, you have the ability to set up security preferences that are not available on a desktop computer. These additional preferences make signing into Columbia Connect quick and easy but also adds an extra layer of security to your private information while you are on the go!

### Enabling Touch ID or Fingerprint Login

Touch ID for iOS and Fingerprint Login for Android are features that use fingerprint recognition technology so that you can unlock your mobile device, make payments or authenticate transactions using only your fingerprint. With fingerprint recognition technology enabled, you can easily and securely sign in to Columbia Connect using our mobile app!

#### iOS



#### Android



**What Is This Feature?**

This feature lets you validate your Mobile Banking session using your fingerprint instead of a login ID and password.

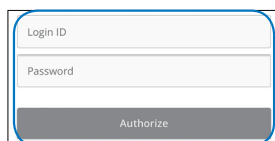
With this feature enabled, you will be prompted to place your registered fingerprint on the fingerprint scanner to login.

**Feature Enablement**

Fingerprint authentication is only available for users with a fingerprint scanner enabled device.

In the event that you choose to disable the feature on your mobile device, your account will revert back to requiring a login ID and password.

**Continue**

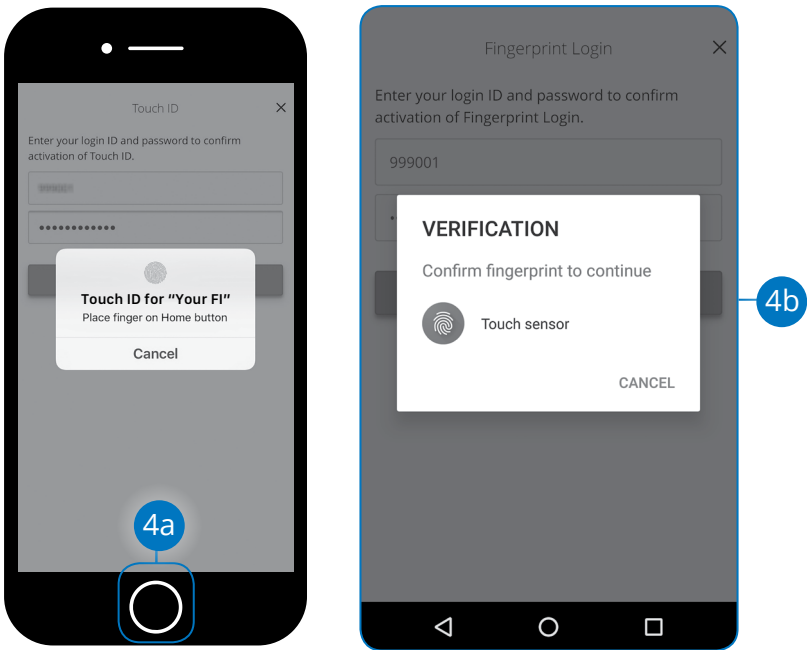


Sign in to Columbia Bank's app and tap the **Menu** button. In the **Settings** tab, tap **Security Preferences**.

1. Toggle the **Touch ID** or **Fingerprint Login** switch from "Off" to "On."
2. Review the information about using fingerprint authentication and tap the **Continue** button.
3. Enter your user ID and password and tap the **Authorize** button.



**Note:** You must have Touch ID or Fingerprint enabled on your mobile device before enabling it through our Columbia Connect app.

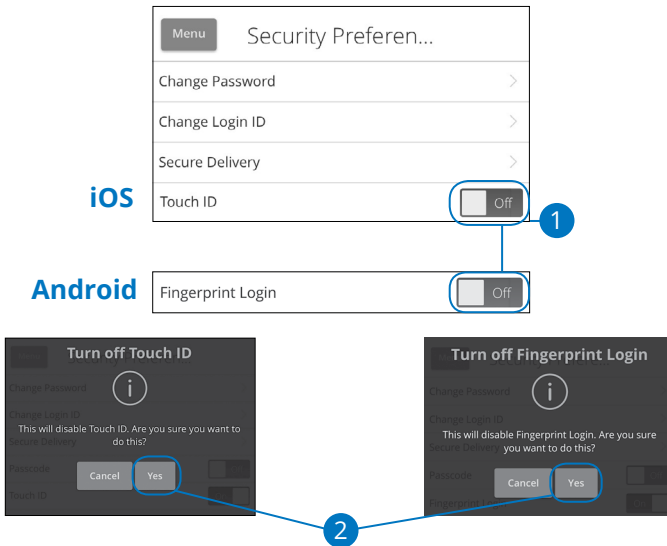


#### 4. Scan your fingerprint

- a. **iOS Device:** Place your finger on the Home button to enable Touch ID.
- b. **Android Device:** Place your finger on the fingerprint scanner to enable Fingerprint Login. Location of scanner varies from device to device.

## Disabling Passcode Touch ID or Fingerprint Login

You can disable Touch ID or Fingerprint Login if you no longer wish to use them. When all features are disabled, you can sign in to Columbia Connect using your user ID and password.



Sign in to Columbia Bank's app and tap the **Menu** button. In the **Settings** tab, tap **Security Preferences**.

1. Toggle the **Touch ID** or **Fingerprint Login** switch from "On" to "Off."
2. Tap the **Yes** button to disable the feature.

# Security

## Alerts Overview

Having peace of mind is critical when it comes to your online banking experience. When you create an alert through Columbia Connect, you specify the conditions to trigger an alert, so you stay on top of what's important to you.

Alerts

--- New Alert ---  
 Date Alert  
 Account Alert  
 History Alert  
 Online Transaction Alert

^ Date Alerts (1)

Description	Account	Frequency	Notification	Enabled	Edit
On the 2nd of May		○	Send only a secure message	On	Edit

Account Alerts (0)

History Alerts (0)

Online Transaction Alerts (0)

Security Alerts (0)

In the **Services** tab, click **Alerts**.

- The "New Alert" drop-down lets you create a date, account, history or transaction alert.
- The ^ icon allows you to collapse or expand alert details for each category.
- Toggling the **Enabled** switch turns an alert on or off without deleting it.
- The "Edit" link lets you make changes to existing alerts.



**Note:** All alerts are automatically sent through secure messages, but you can also choose to receive them by email, phone or text message.

## Date Alerts

Just like marking a calendar, you can set up alerts to remind you of specific dates or events. That way, you never forget a birthday, anniversary, or important payment date again!

The image illustrates the process of setting up a date alert through seven numbered steps:

1. A dropdown menu titled "New Alert" with "Date Alert" selected.
2. A "Select a type" dialog box with "BIRTHDAY" selected.
3. A calendar view for May 2017 with the 8th selected.
4. A "Recurs Every Year" checkbox checked.
5. A "Message" text input field.
6. A "Select a delivery method" dropdown menu with "Secure Message Only" selected.
7. A "Save" button.

In the **Services** tab, click **Alerts**.

1. Use the "New Alert" drop-down and select "Date Alert."
2. Check the box next to an alert type.
3. Enter the date for the alert to occur.
4. Check the box next to "Recurs Every Year" to have your alert repeat annually.
5. (Optional) Enter a message and click the **Set** button.
6. Select a delivery method from the drop-down.
7. Click the **Save** button when you are finished.

## Account Alerts

There should be no surprises when it comes to your finances. Account Alerts can notify you when the balance of any specified account goes above or below a number you choose.

1. --- New Alert ---  
Date Alert  
Account Alert  
History Alert  
Online Transaction Alert

2. Select an account  
 COMMERCIAL CHECKING: XXXX6789  
 COMMERCIAL LOAN: XXXX7890

3. Select a field  
 AVAILABLE BALANCE  
 CURRENT BALANCE

4. Select a comparison  
 GREATER THAN  
 LESS THAN

5. Enter an amount  
\$ 0.00  
1 2 3  
4 5 6  
7 8 9  
Delete 0 Save

6. New Account Alert  
ACCOUNT: XXXX6789  
FIELD: Available Balance  
COMPARISON: No Comparison Selected  
AMOUNT: No Amount Entered  
DELIVERY METHOD: Send only a secure message  
FREQUENCY:  Every Occurrence  
Save

7. Select a delivery method  
 Secure Message Only  
Email  
Phone  
Text Message

In the **Services** tab, click **Alerts**.

1. Use the “New Alert” drop-down and select “Account Alert.”
2. Check the box next to an account name.
3. Check a box to select a field.
4. Check a box to select a comparison.
5. Enter an amount and click the **Save** button.
6. Select a delivery method using the drop-down.
7. Choose a frequency by checking the box next to “Every Occurrence” to repeat the alert.
8. Click the **Save** button when you are finished.

## History Alerts

If you're ever concerned about amount limits or pending checks, you can create History Alerts to contact you when a check number posts or transactions meet an amount you choose.

1. --- New Alert ---  
Date Alert  
Account Alert  
History Alert  
Online Transaction

2. Select an account  
 COMMERCIAL CHECKING: XXXX6789  
 COMMERCIAL LOAN: XXXX7890

3. Select a transaction  
 DEBIT TRANSACTION  
 CREDIT TRANSACTION

4. Select a comparison  
 GREATER THAN  
 LESS THAN

5. Enter an amount  
\$ 0.00  
1 2 3  
4 5 6  
7 8 9  
Delete 0 Save

Enter a check number  
1 2 3  
4 5 6  
7 8 9  
Delete 0 Save

6. New History Alert  
ACCOUNT: XXXX6789  
TRANSACTION: Check Number  
CHECK NUMBER: No Check Number Entered  
DELIVERY METHOD: Send only a secure message  
Select a delivery method  
Secure Message Only  
Email  
Phone  
Text Message  
7. FREQUENCY  
Every Occurrence  
8. Save

In the **Services** tab, click **Alerts**.

1. Click the "New Alert" drop-down and select "History Alert."
2. Check the box next to an account name.
3. Select a transaction type by checking a box.
4. Check a box to select a comparison. These options vary depending on the chosen transaction type.
5. Enter an amount or check number and click the **Save** button.
6. Select a delivery method using the drop-down.
7. Choose a frequency by checking the box next to "Every Occurrence" to repeat the alert.
8. Click the **Save** button when you are finished.

## Online Transaction Alerts

Different types of transactions can occur in your accounts. By creating Online Transaction Alerts, you can be notified when various transfers, payments or debits post to your account.

The image illustrates the process of creating an Online Transaction Alert through a series of steps:

- Step 1:** A dropdown menu titled "New Alert" is shown with options: "Date Alert", "Account Alert", "History Alert", and "Online Transaction Alert".
- Step 2:** A dialog box titled "Select a transaction" is shown with two options: "External Transfer" and "Funds Transfer".
- Step 3:** A dialog box titled "Select a status" is shown with two options: "DRAFTED" and "AUTHORIZED".
- Final Form:** The "New Online Transaction Alert" form is shown with the following fields:
  - TRANSACTION:** No Transaction Selected
  - STATUS:** No Status Selected
  - DELIVERY METHOD:** Send only a secure message. A dropdown menu is open showing options: "Secure Message Only" (checked), "Email", "Phone", and "Text Message".
  - FREQUENCY:** "Every Occurrence" is checked.
  - Save** button.

In the **Services** tab, click **Alerts**.

1. Click the "New Alert" drop-down and select "Transaction Alert."
2. Check the box next to a transaction type.
3. Select a status by checking the appropriate box.
4. Select a delivery method using the drop-down.
5. Choose a frequency by checking the box next to "Every Occurrence" to repeat the alert.
6. Click the **Save** button when you are finished.



# Security

## Security Alerts Overview

We want you to feel confident using Columbia Connect. To make you more secure and stay in control, Security Alerts are implemented in your accounts to notify you immediately when security scenarios occur.

The screenshot displays the 'Security Alerts (28)' section. A list of alerts is shown with descriptions such as 'Alert me when an address is changed' and 'Alert me when my password is changed'. A callout 'A' points to a toggle switch labeled 'Enabled' which is currently turned off. A callout 'B' points to the alert 'Alert me when a computer/browser is successfully registered', which is grayed out. A callout '1' points to the 'Edit Delivery Preferences' link at the top right. A callout '2' points to the 'Delivery Preferences' modal form, which includes fields for 'Email Address' (onlinebanking@sunrisebanks.com), 'Phone Number' (Country: United States, Area Code, Phone Number), and 'SMS Text Number' (Country: United States, Area Code, Phone Number). A callout '3' points to the 'Save' button at the bottom right of the modal.

In the **Services** tab, click **Manage Alerts**, then **Security Alerts**.

- A.** You can turn an alert on or off by toggling the **Enabled** switch.
- B.** If an alert is grayed-out, you cannot edit or disable it.

### Edit Delivery Preferences

When a trigger occurs, Security Alerts are always sent to you through secure messages. You can add additional delivery methods to notify you about your accounts wherever you are.

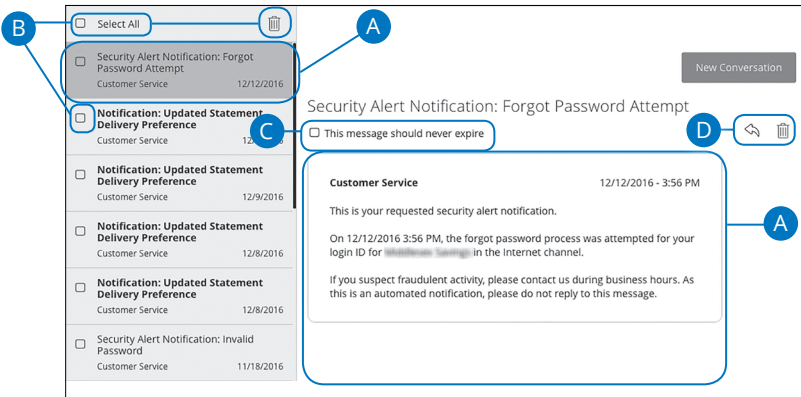
In the **Services** tab, click **Manage Alerts**, then **Security Alerts**.

1. Click the “Edit Delivery Preferences” link at the top. These changes will apply to all Security Alerts.
2. Enter the information for your preferred delivery method.
3. Click the **Save** button when you are finished making changes.




# Security

## Secure Message Overview

If you have questions about your accounts or need to speak with someone at Columbia Bank, Secure Messages allows you to communicate directly with Columbia Bank. From the Secure Messages page, you can find replies, old messages or create new conversations.



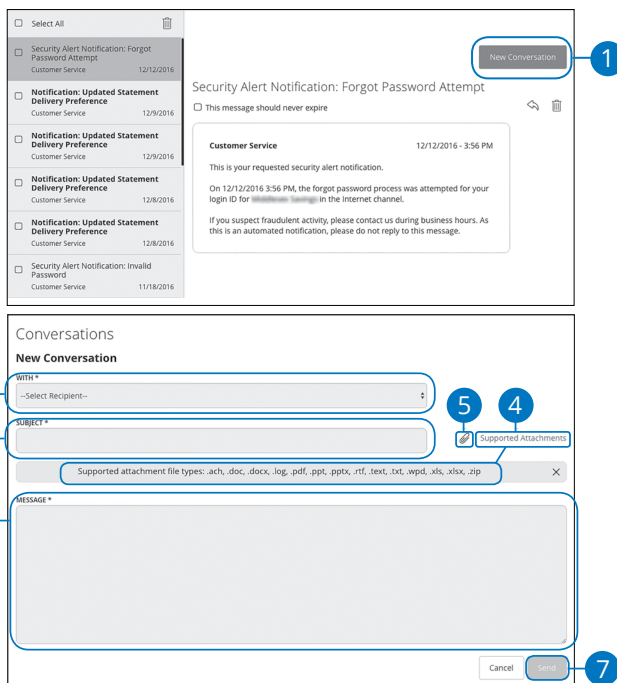
Click the **Messages** tab.

- A. Click on a message to open it. Messages are displayed on the left side of the screen.
- B. Delete multiple messages by checking the box next to the corresponding messages or check the box next to “Select All” and click the  icon.
- C. Messages automatically delete after a certain time. Check the box next to “This message should never expire” to prevent that message from being erased.
- D. Delete an opened message by clicking the  icon or reply by clicking the  icon.


# Security

## Sending a Secure Message

Starting a new conversation through Columbia Connect is just as effortless as sending an email. Unlike an email, you can safely include confidential personal information relating to your accounts or attach files within a new message.



Click the **Messages** tab.

1. Create a new message by clicking the **New Conversation** button in the top right corner.
2. Select the recipient from the drop-down.
3. Enter the subject.
4. (Optional) Click the “Supported Attachments” link to see if your file is supported.
5. (Optional) Attach a file by clicking the .
6. Enter your message.
7. Click the **Send** button when you are finished.

# Transaction Types

## Moving Money Overview

A convenient feature of Columbia Connect is the ability to transfer funds on the go.

- **Funds Transfer:**

Move money between your personal Columbia Bank accounts.

**Funds Transfer**

**FROM \***

----Select From Account----

**TO \***

----Select To Account----

- **Bill Pay:**

Move money to someone's account at another institution or to a company's account.

**Payment Center**

Send Money    Split An Expense

[Organize My List](#)    [Add A Company Or Person](#)

**Household**

**Federal Electric**  
\*1995

[Request eBills](#)

\*23496    \$    [ ]

[Activity](#)   [Reminders](#)   [AutoPay](#)   [eBills](#)

---

**Super Financial**  
741173

\*23496    \$    [ ]

[Activity](#)   [Reminders](#)   [AutoPay](#)   [eBills](#)

**Incoming Payments**

This section lists only those incoming payments you need to take action on.

**Reminders**

National Credit *98765	\$50.00	10-10-16	<a href="#">File Bill</a>
Telecom *61812	\$158.19	10-01-16	<a href="#">File Bill</a>

**Pending Payments**

# Transactions

## Transfer Funds

When you need to make a one-time or recurring transfer between your personal Columbia Bank accounts, you can use the Funds Transfer feature. These transactions go through automatically, so your money is always where you need it to be.

The screenshot shows a 'Transfer Funds' form with three numbered callouts:

- 1** points to the 'From' field, which contains a dropdown menu with the text '----Select From Account---'.
- 2** points to the 'Amount' field, which contains a text input with '\$0.00' and a checkbox labeled 'Make this a recurring transaction'.
- 3** points to the 'Date' field, which contains a text input with '6/2/2017' and a calendar icon.

In the **Move Money** tab, click **Make Transfers**.

1. Select the accounts to transfer funds between using the "To" and "From" drop-downs.
2. Enter the amount to transfer.
3. (One-Time Transfer Only) Enter the Date to process the transaction.

The screenshot shows a form for setting up a recurring transfer. It includes the following elements:

- Amount:** A text input field containing "0.00". To its right is a checkbox labeled "Make this a recurring transaction" with a callout "4a".
- How often should this transfer repeat?:** A dropdown menu with the text "----Select Transaction Frequency---" and a callout "4b".
- Start Date:** A text input field with the placeholder "Please select a Frequency" and a calendar icon, with a callout "4c".
- End Date:** A text input field with the placeholder "Please select a Start Date" and a calendar icon.
- Repeat Forever:** A checkbox with the label "Repeat Forever" and a callout "4d".
- Memo (optional):** A text input field with the placeholder "Enter letters and numbers only" and a callout "5".
- Buttons:** A "Clear" button and a "Transfer Funds" button (highlighted in grey) with a callout "6".

4. If you would like to set up a recurring transfer, follow the steps below.
  - a. Check the box next to "Make this a recurring transaction" to repeat the transfer.
  - b. Use the "How often should this transfer repeat?" drop-down to specify how often the transfer should occur.
  - c. Enter a start and end date for this transaction using the calendar features.
  - d. If your transaction doesn't have an end date, check the box next to "Repeat Forever."
5. Enter a memo.
6. Click the **Transfer Funds** button when you are finished.



**Note:** You can view or cancel unprocessed transactions by accessing the Recurring Transactions tab within the Maintenance Center.




# Transactions

## Maintenance Center Overview

All transactions initiated through Columbia Connect or through our app appear in the Maintenance Center. All single and recurring transactions, along with deposited checks appear in the Maintenance Center, as well as any stop payments and check reorders.

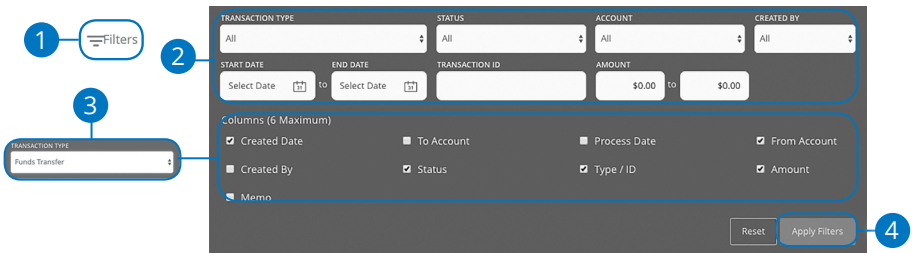
The screenshot shows the Maintenance Center interface. At the top, there are three tabs: "Single Transactions", "Recurring Transactions", and "Mobile Deposit History". Below the tabs is a search bar labeled "Search transactions" with a search icon and a close button. To the right of the search bar are "Filters", "Favorites", "show advanced", a print icon, and a download icon. Below the search bar is a table with columns: "Created", "Status", "Transaction Type", "Account", and "Amount". The table contains five rows of transaction data. The first row is expanded, showing details for a transaction on 12/8/2016, Drafted, Domestic Wire - Tracking ID: 27266, with an amount of \$2,000.00. The details section includes fields for Tracking ID, Created By, Will process On, From Account, To Account, To Account Type, Amount, Recipient Wire Name, Recipient Address 1, Recipient Address 2, Recipient City, and Recipient State. An "Actions" dropdown menu is open for the selected transaction, showing options: Cancel, Inquire, Copy, and Print Details.

In the **Services** tab, click **Maintenance Center**.

- A.** Click an appropriate tab at the top to view **Single Transactions**, **Recurring Transactions** or **Mobile Deposit History**.
- B.** Use the search bar to find transactions within that account.
- C.** Print the Maintenance Center page by clicking the  icon. Export your transactions into a different format by clicking the  icon.
- D.** Click the  icon next to the Created, Status, Transaction Type, Account or Amount columns to sort transactions.
- E.** Click on a transaction to view more details.
- F.** Select **Actions** to perform additional functions.

## Using Filters

What appears on the Maintenance Center can be customized using various filters. You can also choose up to six columns to display, so you can swiftly find what you're looking for each time.



In the **Services** tab, click **Maintenance Center**.

1. Click the **Filters** icon to create a custom view of your transactions.
2. Create a custom list of transactions using these filters.
3. Filter the type of transaction you are looking for using the "Transaction Type" drop-down. Column names with check boxes appear. You may select up to six boxes.
4. Click the **Apply Filters** button when you are finished.

## Creating or Deleting Custom Views Using Favorites

After applying specific filters, you can save that view of the Maintenance Center to Favorites, making it easier and faster to search, print or export transactions. You can always delete Favorites if they are no longer useful.



In the **Services** tab, click **Maintenance Center**.

1. Apply filters and click the "Favorites" link.
2. Click the + icon to create a new favorite template.
3. Enter a name for your new custom view.
4. Click the **Save** button when you are finished.
5. Click the **X** icon to remove a custom view from your Favorites.




## Canceling Transactions

The Maintenance Center shows all pending transactions that have not posted to your account. You can also cancel pending transactions up until their process date.

The screenshot shows the Maintenance Center interface with a table of transactions. A 'show advanced' button is highlighted with a blue circle and the number 1. The table has columns for Created, Status, Transaction Type, Account, Amount, and Actions. The first two rows are selected, and a 'Cancel Selected' button is highlighted with a blue circle and the number 3. A 'Confirm' button in the confirmation dialog is highlighted with a blue circle and the number 4.


Created	Status	Transaction Type	Account	Amount	Actions
12/13/2016	Authorized	Funds Transfer - Tracking ID: 27331	Regular Checking XXXX6789	\$1,000.00	<input checked="" type="checkbox"/> Cancel Selected <input type="checkbox"/> View Selected Details
12/8/2016	On Hold	Domestic Wire - Tracking ID: 27275	Regular Checking XXXX6789	\$3,300.00	<input checked="" type="checkbox"/> Cancel Selected <input type="checkbox"/> View Selected Details
12/8/2016	Authorized	External Transfer - Tracking ID: 27274	Regular Checking XXXX6789	\$30,000.00	<input type="checkbox"/> Actions
12/8/2016	Cancelled	ACH Collection - Tracking ID: 27267		\$2,500.00	<input checked="" type="checkbox"/> Actions

**Cancel Transaction**



Are you sure you want to cancel this transaction?

In the **Services** tab, click **Maintenance Center**.

1. Click the  **Show Advanced** icon. An additional column of check boxes appears next to the Amount column.
2. Browse through your pending transactions and check the box for each transaction you want to cancel. Check the box between Amount and Actions to select all transactions.
3. Click the "Actions" drop-down and click "Cancel Selected."
4. Click the **Confirm** button when you are finished. The status then changes to "Cancelled" on the Maintenance Center page.



**Note:** If you cancel a recurring transaction in the Single Transaction tab, you will only cancel that single occurrence. To cancel an entire series, you must visit the Recurring Transactions tab in the Maintenance Center.

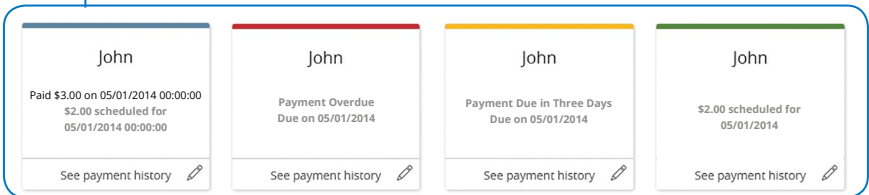
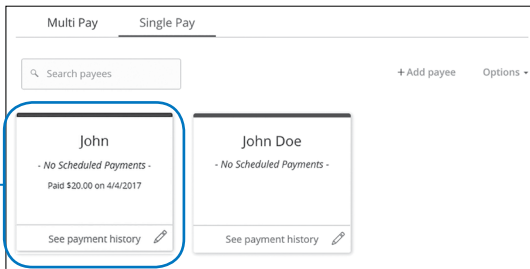
# Bill Pay

## Bill Pay Overview

Sending payments to companies and individuals has never been easier! Bill Payment with Columbia Connect helps you stay on top of your bills, allowing you to quickly manage your payments and never miss a due date.



**Note:** The first time that you click the Bill Pay tab, you need to choose an account to use within Bill Pay and to accept the terms and conditions. To remove an account from Bill Pay, contact us at 877-754-5074.



In the **Move Money** tab, click on **Pay Bills**.

- A.** After you create a payee, their name and payment information appears as a card.
- B.** The card colors can change, informing you of the status of your payments.

**Blue:** Paid

**Red:** Payment overdue

**Yellow:** Payment due in the next 3 days


**Green:** Scheduled payment

The screenshot shows the 'Bill Pay' interface. At the top, there are tabs for 'Multi Pay' and 'Single Pay'. A search bar for payees is labeled 'F'. Below it, a card for 'John' shows '- No Scheduled Payments -' and 'Paid \$20.00 on 4/4/2017'. A 'See payment history' link is labeled 'C', and an edit icon is labeled 'G'. To the right, there is a '+ Add payee' link labeled 'D' and an 'Options' dropdown menu labeled 'E' containing 'Visit Bill Pay Site' and 'Delete A Payee'. On the far right, a sidebar labeled 'H' has a 'Search payments' bar, tabs for 'Pending' and 'Processed', and a 'No History Available' message.

Past 1 payment(s): \$20.00

Amount	Date
\$20	4/4

Hide payment history

- C.** Click the “See payment history” link to see a graph of your previous payments to that payee.
- D.** Click the “Add Payee” link to create a new payee.
- E.** The “Options” drop-down contains links for deleting a payee and visiting the advanced bill pay site.
- F.** You can find payees using the search bar.
- G.** The  icon lets you make changes to existing payees.
- H.** An additional sidebar on the right allows you to view all pending and processed payments. You can find payments using the search bar.

# Bill Pay

## Managing Payees

### Creating a Payee

Using Bill Pay can save you time with payee profiles for the companies or people you pay regularly. Whether it's a one-time payment or a frequent occurrence, managing your payees lets you pay your bills securely and on time in just a few clicks.

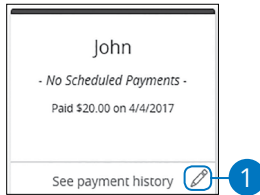
The screenshot shows the 'Bill Pay' interface. At the top, there are tabs for 'Multi Pay' and 'Single Pay'. Below the tabs is a search bar labeled 'Search payees' and a '+ Add payee' button (callout 1). To the right of the search bar is an 'Options' dropdown menu. Below this is the 'Add Payee' form. The form has several fields: 'Name \*' (callout 2), 'Payee Nickname', 'Payee Type \*' (a dropdown menu, callout 3), 'Address 1 \*', 'Address 2', 'City \*', 'State \*' (a dropdown menu labeled 'Select State', callout 4), 'ZIP \*', 'Area Code \*', 'Phone \*', 'Ext.' (callout 5), and 'Payee Account #' (callout 6). At the bottom right of the form are 'Cancel' and 'Save' buttons (callout 7).

In the **Move Money** tab, click **Pay Bills**.

1. Click the "Add Payee" link.
2. Enter the new payee's name and add an optional nickname.
3. Choose the type of payee to create using the "Payee Type" drop-down.
4. Enter the payee's street address, city and zip code and choose the state using the "State" drop-down.
5. Enter the payee's area code and phone number.
6. Enter the payee's account number.
7. Click the **Save** button when you are finished.

## Editing a Payee


You can make edits to existing payees on the Bill Payment page if their contact information or account number changes.



A screenshot of the 'Edit Payee' form. The form contains the following fields and controls:

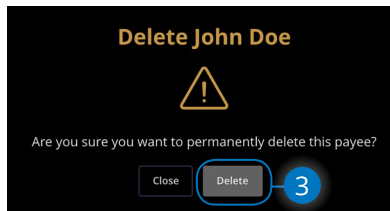
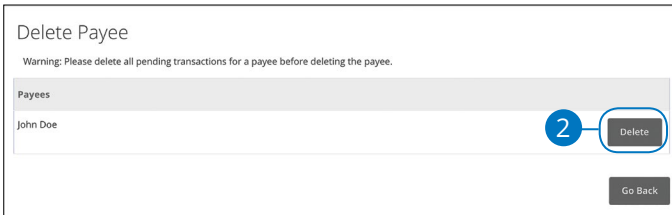
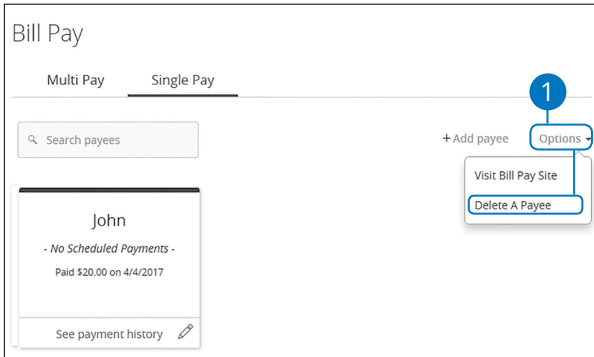
- Name \***: Text input with 'JOHN DOE' (Callout 3).
- Payee Type \***: Dropdown menu with 'Individual' selected.
- Payee Nickname**: Text input with 'John Doe'.
- Payment Type**: Dropdown menu with 'Check' selected.
- Address 1 \***: Text input with '13610 barrett office drive'.
- Address 2**: Empty text input.
- City \***: Text input with 'st. louis'.
- State \***: Dropdown menu with 'Missouri' selected.
- ZIP \***: Text input with '63021-\_\_\_'.
- Area Code \***: Text input with '(314)'.
- Phone \***: Text input with '394-2116'.
- Ext.**: Empty text input.
- Payee Account #**: Text input with '123456789'.
- Buttons**: 'Cancel' and 'Save' buttons (Callout 4).

In the **Move Money** tab, click **Pay Bills**.

1. Locate a payee to edit and click the  icon.
2. Enter the new information for the existing payee.
3. Click the **Save** button when you are finished making changes.

## Deleting a Payee

If you no longer need a payee and wish to remove them from your Bill Pay, you can do so from the Bill Payment page.



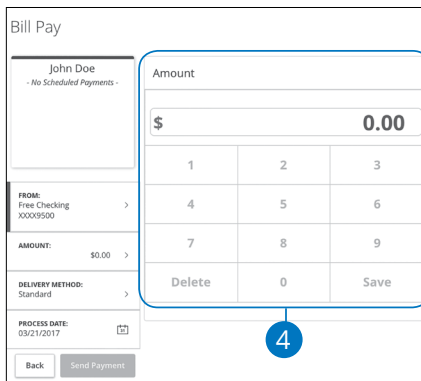
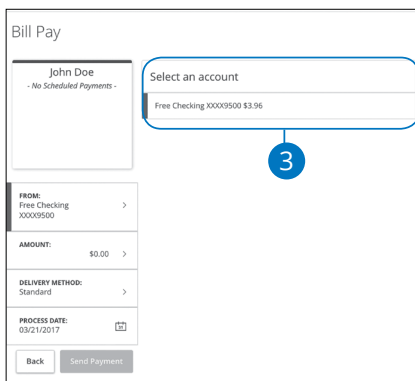
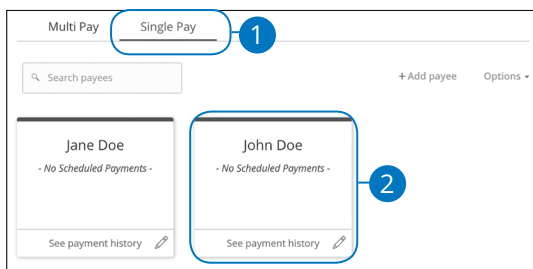
In the **Move Money** tab, click **Pay Bills**.

1. Use the "Options" drop-down and choose "Delete a Payee."
2. Click the **Delete** button next to the payee you want to remove.
3. A confirmation screen appears. Click the **Delete** button to permanently remove that payee.

# Bill Pay

## Making a Single Payment

After creating a payee, you can begin paying your bills online without the hassle of cash or checks. You can effortlessly pay a single bill or schedule payments for the future so you never miss a deadline.



In the **Move Money** tab, click **Pay Bills**.

1. Select a payee.
2. Select the account to take funds from.
3. Enter the amount and click the **Save** button.

Bill Pay

John Doe  
- No Scheduled Payments -

Select a delivery method

Standard - 5 business days required      Free

5

FROM: Free Checking  
XXXX9500 >

AMOUNT: \$0.00 >

DELIVERY METHOD: Standard >

PROCESS DATE: 03/21/2017

Back    Send Payment

Bill Pay

John Doe  
- No Scheduled Payments -

Select a process date:

◀ March ▶ ◀ 2017 ▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

6

FROM: Free Checking  
XXXX9500 >

AMOUNT: \$0.00 >

DELIVERY METHOD: Standard >

PROCESS DATE: 03/21/2017

Back    Send Payment

7

4. Select a delivery method.
5. Choose the date to pay the bill using the calendar.
6. Click the **Send Payment** button when you are finished.



# Bill Pay

## Paying Multiple Bills

You can schedule different payments for multiple payees at the same time, so you can pay all your bills in a single session!

The screenshot illustrates the 'Bill Pay' interface. At the top, there are tabs for 'Multi Pay' (selected) and 'Single Pay'. Below the tabs is a search bar labeled 'Search payees' and a '+ Add payee' button. Two payee cards are shown: 'Jane Doe' and 'John Doe', both with '- No Scheduled Payments -'. Below this is a table for entering payment details. The table has columns for 'Name', 'Pay from', 'Amount', and 'Process Date'. Two rows are shown for 'Jane Doe' and 'John Doe', both with 'Free Checking: XXXX9500' as the pay from account and '\$0.00' as the amount. The 'Process Date' column has a 'Select Date' button with a calendar icon. Below the table, the total for 0 payments is \$0.00, and there is a 'Review Payments' button. Below the table is a 'Review Your Payments' section with a table showing the details for Jane Doe and John Doe, both with a payment amount of \$10.00 and a process date of 3/22/2017. The total for 2 payments is \$20.00, and there are 'Edit Payments' and 'Submit Payments' buttons.

Name	Pay from	Amount	Process Date
Jane Doe	Free Checking: XXXX9500	\$0.00	Select Date
John Doe	Free Checking: XXXX9500	\$0.00	Select Date

Total for 0 payments: **\$0.00**

Review Your Payments			
Name	Pay from	Amount	Process Date
Jane Doe	Free Checking: XXXX9500	\$10.00	3/22/2017
John Doe	Free Checking: XXXX9500	\$10.00	3/22/2017

Total for 2 payments: **\$20.00**

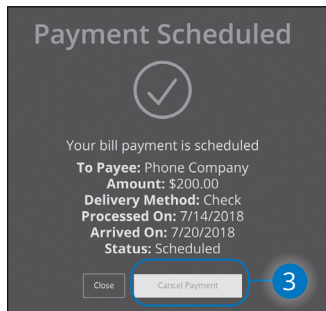
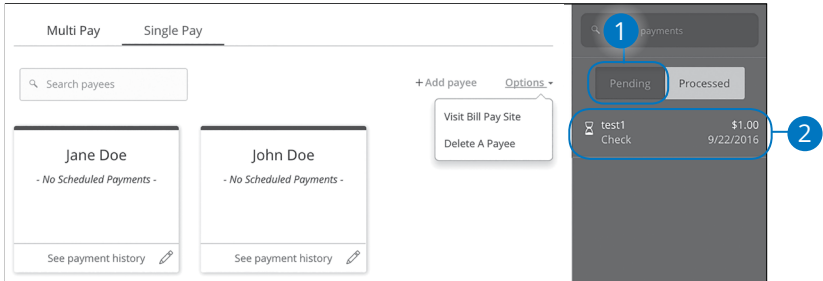
In the **Move Money** tab, click **Pay Bills**.

1. Click on the "Multi Pay" link.
2. Choose the accounts funds will be taken from using the "Pay From" drop-downs.
3. Enter amounts for each bill.
4. Select the dates to pay bills using the calendar.
5. Click the **Review Payments** button.
6. Review your payment information and click the **Submit Payments** button when you are finished.

# Bill Pay

## Canceling Pending Transactions

You can delete a scheduled payment if it has not cleared your account and is still pending. All pending and processed transactions are listed in the right sidebar for your convenience.



In the **Move Money** tab, click **Pay Bills**.

1. Click the **Pending** button in the sidebar to see a list of unprocessed payments.
2. Cancel a payment by clicking the appropriate pending transaction.
3. Click the **Cancel Payment** button on the Payment Scheduled page.
4. A confirmation message appears. Click the **Close** button when you are finished.

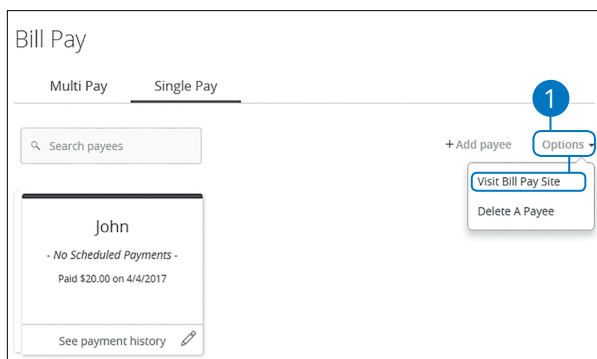


**Note:** Scheduled pending payments also appear under the Status column in green.

# Advanced Bill Pay

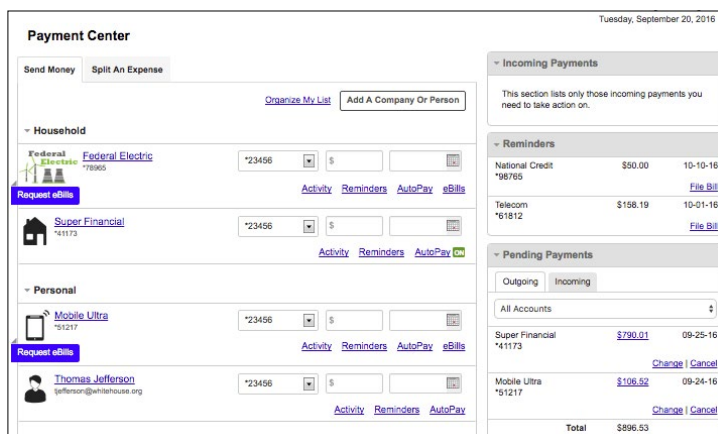
## Overview

Bill Pay allows you to stay on top of your monthly finances with utmost ease and turnkey efficiency. Free yourself from the hassle of writing checks and the clutter that comes with the traditional method to paying bills! This is also a quick and easy alternative to paying your bills online at the websites of each individual company.



In the **Move Money** tab, click **Pay Bills**.

1. Use the “Options” drop-down and choose “Visit Bill Pay Site.”



The Payment Center is a guide to your billers and bills due, as well as where you will edit or delete scheduled payments.

# Advanced Bill Pay

## Billers Set Up

The person or company to whom you are sending funds is known as the biller. A biller can be almost any company or person you would send a written check to, like a utility company, a cable TV provider or even a relative. It's convenient to set up an automatic payment for a biller so you don't have to repeat the same scheduling process each month.

George Washington  
Tuesday, September 20, 2016

### Payment Center

Send Money
Split An Expense

Organize My List
Add A Company Or Person

**Household**

Federal Electric  
\*78965

[Request eBills](#)

[Activity](#)
[Reminders](#)
[AutoPay](#)
[eBills](#)

Super Financial  
\*41173

[Request eBills](#)

[Activity](#)
[Reminders](#)
[AutoPay](#)
[eBills](#)

**Personal**

Mobile Ultra  
\*51217

[Request eBills](#)

[Activity](#)
[Reminders](#)
[AutoPay](#)
[eBills](#)

Thomas Jefferson  
tjefferson@whitehouse.org

[Request eBills](#)

[Activity](#)
[Reminders](#)
[AutoPay](#)

**My Bills**

National Credit  
\*98765

[Request eBills](#)

[Activity](#)
[Reminders](#)
[AutoPay](#)
[eBills](#)

DUE SEP 25 for \$60.82

**Incoming Payments**

This section lists only those incoming payments you need to take action on.

**Reminders**

Bill	Amount	Due Date	Action
National Credit *98765	\$50.00	10-10-16	<a href="#">File Bill</a>
Telecom *61812	\$158.19	10-01-16	<a href="#">File Bill</a>

**Pending Payments**

Outgoing
Incoming

All Accounts

Bill	Amount	Due Date	Action
Super Financial *41173	\$790.01	09-25-16	<a href="#">Change</a>   <a href="#">Cancel</a>
Mobile Ultra *51217	\$106.52	09-24-16	<a href="#">Change</a>   <a href="#">Cancel</a>
<b>Total</b>	\$896.53		

**Recent Payments**

Outgoing
Incoming

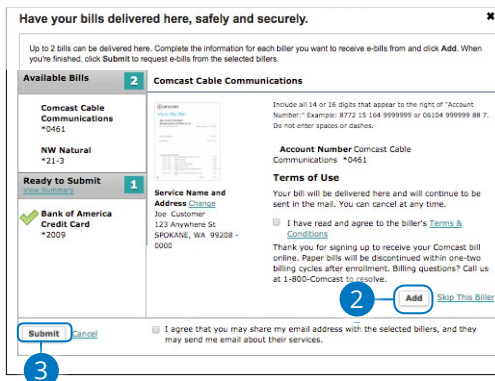
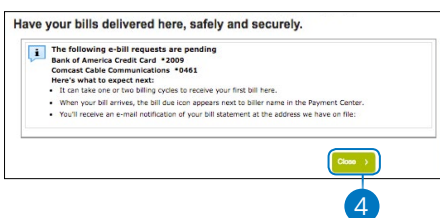
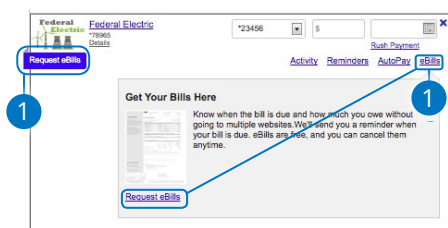
You will see your billers listed in the **Payment Center**

1. Click the button at the top of the page to **Add a Company or Person**.
2. Click the name of the biller to see or change their information, such as their address, telephone number and recent payments.

# Advanced Bill Pay

## eBills

eBills are a fast and convenient way to receive your bills each month. If your biller offers an electronic version of your bill, the eBills icon will be located next to the name within the Payment Center. After activating eBills, you will start receiving your bill directly within your Bill Pay account. No need to shuffle through biller information or access each individual biller's website to pay your bills—you can manage it all right here and never miss a payment!



1. Click on the **Request eBills** icon or “eBills” link.
2. Click the **Add** button for each biller you would like to add to eBills.
3. When completed, click the **Submit** button.
4. A **Confirmation** message appears. Click the **Close** button.

# Advanced Bill Pay

## Schedule Payments

No check? No pen? No problem! Our payment scheduling feature is the only thing you need to accomplish your Bill Pay needs. Hassle-free Bill Pay is just a couple clicks away!

**Payment Center**

Send Money Split An Expense

Organize My List Add A Company Or Person

**Household**

Federal Electric \*23456 \$ 09/26/2016

Request eBills

Today is Tuesday, Sep 20

September 2016 October 2016

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3								
4	5	6	7	8	9	10	2	3	4	5	6	7	8
11	12	13	14	15	16	17	9	10	11	12	13	14	15
18	19	20	21	22	23	24	16	17	18	19	20	21	22
25	26	27	28	29	30		23	24	25	26	27	28	29
							30	31					

Rush Delivery  
 FREE Delivery Date

Mobile Ultra \*91217 \*23456 \$

Request eBills Activity Reminders AutoPay sBills

Thomas Jefferson tjefferson@whitehouse.org \*23456 \$

Activity Reminders AutoPay

**My Bills**

National Credit \*98765 \*23456 \$

DUE SEP 25 for \$80.82 Activity Reminders AutoPay sBills

Telecom \*61812 \*23456 \$

DUE OCT 05 for \$158.19 Activity Reminders AutoPay sBills

Send Money

**Incoming Payments**

This section lists only those incoming payments you need to take action on.

**Reminders**

National Credit *98765	\$50.00	10-10-16	<a href="#">File Bill</a>
Telecom *61812	\$158.19	10-01-16	<a href="#">File Bill</a>

**Pending Payments**

Outgoing Incoming

All Accounts

Super Financial *41173	\$790.01	09-25-16	<a href="#">Change</a>   <a href="#">Cancel</a>
Mobile Ultra *51217	\$106.52	09-24-16	<a href="#">Change</a>   <a href="#">Cancel</a>
<b>Total</b>	<b>\$896.53</b>		

**Recent Payments**

Outgoing Incoming

All Accounts

Federal Electric *78965	\$80.82	09-10-16
Telecom *61812	\$158.19	09-10-16
Mobile Ultra *51217	\$106.52	08-31-16
Super Financial *41173	\$790.01	08-22-16
Mobile Ultra *51217	\$106.52	08-20-16
Federal Electric *78965	\$71.23	08-10-16
<b>Total</b>	<b>\$1,313.29</b>	

Bills are listed by name in the **Payment Center**.

1. Enter the amount of your bill, and use the calendar feature to select the payment due date.
2. Click the **Send Money** button when finished.

# Advanced Bill Pay

## Automatic Payments

It's convenient to set up a biller to receive payments on a regular basis. Don't get stuck spending your time scheduling payments each month. With our Automatic Payment option, you can remain confident that your payments are taken care of automatically so you can focus on what really matters!

**Manage AutoPay for Federal Electric**  
Federal Electric  
\*78965

**Pay From**  
\*23456

**Amount**  
\$

**First Delivery Date**  
Numeric date starting with the month

**Frequency**  
Select A Frequency

**Duration**  
Select a Duration

Get Email Notifications

**Start Making Payments** [Cancel](#)

In the **Payment Center**, select the biller for which you would like to set up automatic payments. Select **AutoPay** and then **Set Up Autopay**.

1. Fill in the required fields to complete your request for an automatic payment.
2. Click the **Start Sending Payments** button when complete.

# Advanced Bill Pay

## Change/Cancel Payments

You can change or cancel a payment even after you schedule it. This convenient feature gives you the freedom to change the way you make your payments.

The screenshot displays the 'Pending Payments' section of the Advanced Bill Pay interface. The interface is organized into three main columns. The left column lists billers under categories like Household, Personal, and My Bills. The middle column shows a list of pending payments with columns for account name, amount, and due date. The right column shows a summary of recent payments. Two blue callout boxes with numbers 1 and 2 highlight the 'Change' and 'Cancel' links next to a pending payment from Super Financial.

Account Name	Amount	Due Date
National Credit *98765	\$50.00	10-10-16
Telecom *61812	\$158.19	10-01-16
Super Financial *41173	\$790.01	09-25-16
Mobile Ultra *51217	\$106.52	08-31-16
<b>Total</b>	<b>\$896.53</b>	

Locate the **Pending Payments** box in the **Payment Center**.

1. Click the "Change" link to edit your payment in a secondary screen. Here, you can change the Pay From Account, Pay Date or Pay Amount.
2. Click the "Cancel" link if you do not wish to process the payment.



# Advanced Bill Pay

## View Bill History

You can conveniently view and print your bill history and details using Online Bill Pay.

**Payment Details** 3 X

Pending > Processing > Delivered ✓

**Federal Electric** \*78965  
Federal Electric Check #214 was mailed to Federal Electric for receipt by 9/12/2016

1 **Pay From** Main Checking \*23456  
**Amount** \$80.82  
**Withdrawn on** Sep 10, 2016  
**Confirmation** xxxx-xxxx

CHECK   
**DELIVER BY**  
Sep 10

[Payment Inquiry](#) [Print](#) 2

Click the **Payment Amount** link in **Recent Payments**.

1. Review the Pay From account, Withdraw On date, Amount, and Confirmation number.
2. Click the "Payment Inquiry" link to inquire about a specific payment or click the "Print" link to print the payment details.
3. Exit out of the window by clicking the **X** icon in the top right corner.

# Services

## Stop Payment Request

### Single Check

If you're ever worried about a pending written check, you can initiate a stop payment request to prevent that check from being cashed. Once approved, the stop payment remains in effect for 6 months. If you need the current fee information, please call us during our business hours at 877-754-5074.

### Stop Payment

Complete the fields below to make a stop payment request based on known payment information. There is a \$35.00 fee for each stop payment placed. The charge will be deducted from your checking account when the stop payment is completed. The stop payment will expire six (6) months from the date it is completed. To place a stop payment on ACH Items, Bill Pay Items, or a range of check numbers, you will need to contact your branch or our Customer Care Center at 1-877-754-5074.

ACCOUNT *	Select an Account
CHECK NUMBER *	Neighborhood Ac XXXXX3708 \$4.43 Prime Checking XXXXX3716 \$15.12
PAYEE	* - Indicates required field

Cancel Send Request

### Stop Payment

Complete the fields below to make a stop payment request based on known payment information. There is a \$35.00 fee for each stop payment placed. The charge will be deducted from your checking account when the stop payment is completed. The stop payment will expire six (6) months from the date it is completed. To place a stop payment on ACH Items, Bill Pay Items, or a range of check numbers, you will need to contact your branch or our Customer Care Center at 1-877-754-5074.

ACCOUNT *	Enter the check number		
CHECK NUMBER *	<input type="text"/>		
PAYEE	1	2	3
AMOUNT *	4	5	6
DATE	7	8	9
NOTE	Delete	0	Save

In the **Services** tab, click **Stop Payment**.

1. Select the appropriate account.
2. Enter the check number and click the **Save** button.

### Stop Payment

Complete the fields below to make a stop payment request based on known payment information. There is a \$35.00 fee for each stop payment placed. The charge will be deducted from your checking account when the stop payment is completed. The stop payment will expire six (6) months from the date it is completed. To place a stop payment on ACH Items, Bill Pay Items, or a range of check numbers, you will need to contact your branch or our Customer Care Center at 1-877-754-5074.

ACCOUNT *	<div style="border: 1px solid #ccc; padding: 5px;"> <p style="text-align: center; margin: 0;">Enter the payee</p> <input style="width: 100%; margin: 5px 0;" type="text" value="Payee Name"/> <div style="text-align: center; margin: 5px 0;"> <input type="button" value="Set"/> </div> </div>
CHECK NUMBER *	
PAYEE	

3

### Stop Payment

Complete the fields below to make a stop payment request based on known payment information. There is a \$35.00 fee for each stop payment placed. The charge will be deducted from your checking account when the stop payment is completed. The stop payment will expire six (6) months from the date it is completed. To place a stop payment on ACH Items, Bill Pay Items, or a range of check numbers, you will need to contact your branch or our Customer Care Center at 1-877-754-5074.

ACCOUNT *	<div style="border: 1px solid #ccc; padding: 5px;"> <p style="text-align: center; margin: 0;">Enter the check amount</p> <div style="text-align: center; margin: 5px 0;"> <span style="font-size: 24px;">\$</span> <input style="width: 150px;" type="text" value="0.00"/> </div> <table border="1" style="width: 100%; text-align: center; border-collapse: collapse;"> <tr> <td style="width: 33.33%;">1</td> <td style="width: 33.33%;">2</td> <td style="width: 33.33%;">3</td> </tr> <tr> <td>4</td> <td>5</td> <td>6</td> </tr> <tr> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>Delete</td> <td>0</td> <td>Save</td> </tr> </table> </div>	1	2	3	4	5	6	7	8	9	Delete	0	Save
1		2	3										
4		5	6										
7		8	9										
Delete		0	Save										
CHECK NUMBER *													
PAYEE													
AMOUNT *													
DATE													
NOTE													

4

### Stop Payment

Complete the fields below to make a stop payment request based on known payment information. There is a \$35.00 fee for each stop payment placed. The charge will be deducted from your checking account when the stop payment is completed. The stop payment will expire six (6) months from the date it is completed. To place a stop payment on ACH Items, Bill Pay Items, or a range of check numbers, you will need to contact your branch or our Customer Care Center at 1-877-754-5074.

ACCOUNT *	<div style="border: 1px solid #ccc; padding: 5px;"> <p style="text-align: center; margin: 0;">Enter the date of the check</p> <div style="text-align: center; margin: 5px 0;"> <span style="font-size: 24px;">◀</span> June <span style="font-size: 24px;">▶</span> <span style="font-size: 24px;">◀</span> 2017 <span style="font-size: 24px;">▶</span> </div> <table border="1" style="width: 100%; text-align: center; border-collapse: collapse;"> <tr> <td style="width: 14.28%;">Sun</td> <td style="width: 14.28%;">Mon</td> <td style="width: 14.28%;">Tue</td> <td style="width: 14.28%;">Wed</td> <td style="width: 14.28%;">Thu</td> <td style="width: 14.28%;">Fri</td> <td style="width: 14.28%;">Sat</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td>1</td> <td>2</td> <td>3</td> </tr> <tr> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> </tr> <tr> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> </tr> <tr> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> </tr> <tr> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td style="background-color: #e0e0e0;">30</td> <td></td> </tr> </table> </div>	Sun	Mon	Tue	Wed	Thu	Fri	Sat					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
Sun		Mon	Tue	Wed	Thu	Fri	Sat																																				
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25		26	27	28	29	30																																					
CHECK NUMBER *																																											
PAYEE																																											
AMOUNT *																																											
DATE																																											
NOTE																																											

5

3. (Optional) Enter the payee and click the **Set** button.
4. Enter the amount and click the **Save** button.
5. (Optional) Enter the date of the check using the calendar.

**Stop Payment**

Complete the fields below to make a stop payment request based on known payment information. There is a \$35.00 fee for each stop payment placed. The charge will be deducted from your checking account when the stop payment is completed. The stop payment will expire six (6) months from the date it is completed. To place a stop payment on ACH Items, Bill Pay items, or a range of check numbers, you will need to contact your branch or our Customer Care Center at 1-877-754-5074.

ACCOUNT *	Enter a brief note to include with this request
CHECK NUMBER *	Description <input type="text"/> <b>Set</b>
PAYEE	
AMOUNT *	

\* - Indicates required field

**Cancel** **Send Request**

6

7

6. (Optional) Enter a description under "Note" and click the **Set** button.
7. Click the **Send Request** button when you are finished.



**Note:** You can view the approval status of a stop payment in the Maintenance Center.

# Services


## Reordering Checks

If you've previously ordered checks through Columbia Bank, you can conveniently reorder checks online at any time on our trusted vendor's website.

### Check Reorder

Please choose an account to reorder checks.

PRIME SHARE XXXX	\$0.19
HSA SHARE XXXX	\$0.00
MONEY MARKET CHECKING XXXX	\$0.02


HARLAND CLARKE®
Log Out | Order Status | Contact Us | Chat | Español

PERSONAL PRODUCTS CUSTOMER SERVICE
Powered by HARLAND CLARKE

Shopping Cart

---

Personal Products

- Personal Checks
- Security Products That Help Protect Your Identity!
- Recycled
- Patriotic & Inspirational
- Collegiate
- Most Popular
- View All
- Disney
- New Designs
- Fun & Frivolous
- Warner Bros.
- Nature & Scenic
- Art & Culture
- Classics
- Animals
- Sports
- Charitable
- Sociality Binding Styles
- Special Purpose Checks
- Value Bundles

### Personal Products

Your Credit Card Info Can Be **Stolen from 20 Feet Away**

CardDefense™ sleeves help block electronic pickpocketing by wireless scanners

**Order Now for Only \$485**  
plus tax  
5-Pack / Shipping Included!

#### Personal Checks [View All](#)

**NEW!**

Security Products That Help Protect Your Identity!

Recycled

Patriotic & Inspirational

Collegiate

Most Popular

View All

#### Home Office/Desk Products [View All](#)

Desk End Stub

Desk Register

Desk Register Ringbound

Desk Interleaf

Desk Memory Stub

Desk Compact End Stub

#### Accessories [View All](#)

Checkbook Covers & Wallets

Labels

Registers

#### Deposit Tickets [View All](#)

Deposit Tickets

In the **Services** tab, click on **Order Checks**.

1. Choose the account you want checks ordered for.
2. Complete your order on our vendor's website.



**Note:** If you notice that you are missing checks, please contact us right away at 877-754-5074 so that we can take precautions to safeguard against identity theft and fraud.

# Services


## Statements

The Statements feature is a great virtual filing system for your bank statements, saving paper and space in your home or office. By storing your statements electronically, your account information is always readily available when you need it.


### PDF Verification

The E-Sign Act requires us to verify that you are able to view PDFs. Please help us by following these two steps:

1 Press "Get Code"—you will see a PDF with a code for you to copy and paste.



2 Paste the code exactly as it appears into this field and click Verify. (Can't see a PDF?)



### Statements

3

ACCOUNT

4

DATE

5

DOCUMENT TYPE  
pdf

6

Get Statement

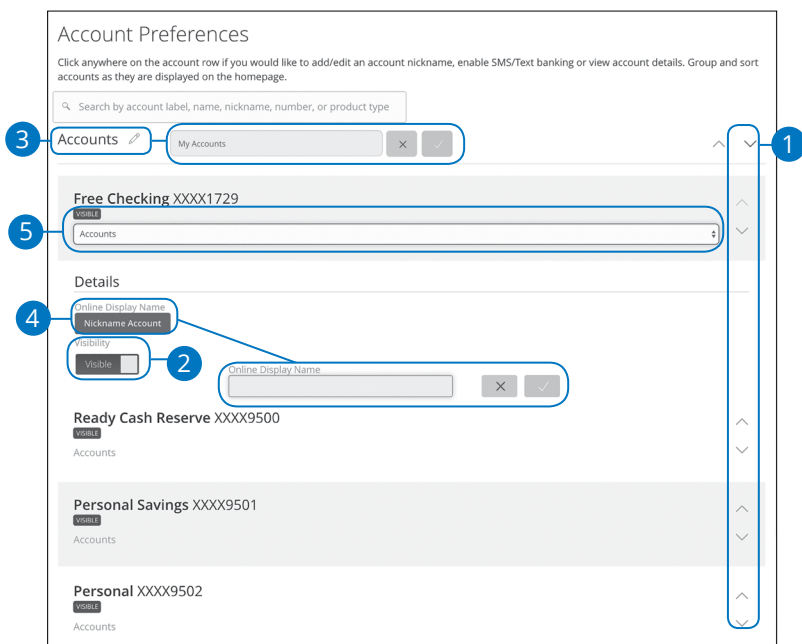
In the **Services** tab, click **Statements**.

1. Click the **Get Code** button to verify that you can view a PDF.
2. A PDF with a code appears. Type the code into the verification field and click the **Verify** button.
3. Choose an account to work with using the "Account" drop-down.
4. Choose a date for the statement using the "Date" drop-down.
5. Use the "Document Type" drop-down to select a file format.
6. Click the **Get Statement** button when you are finished.


# Services

## Account Preferences

The Home page and your accounts should appear in a way that is fitting for you. The names of accounts, order in which they appear on the Home page, order of account groups and names of account groups can be changed in Account Preferences to suit your needs.



In the **Settings** tab, click **Account Preferences**.

1. Select the up or down arrows on the right side to change the order that your accounts appear in.
2. Use the **Visibility** switch to toggle whether or not your account is visible on the Home page.
3. Click the  icon to change the nickname of a group or an account. Make your changes and click the check mark to save it.
4. Click the **Nickname Account** button to change the Online Display Name of an account. Make your changes and click the check mark to save it.
5. Select the "Account" drop-down to change the group that account is in.

# Services

## Text Enrollment

Text Banking allows you to manage your accounts on the go. Once enrolled, you can check balances, review account history and transfer funds from your Columbia Connect account using any text-enabled device.

The image shows two screenshots from a mobile application. The top screenshot is the 'Text Enrollment' form. It has a title 'Text Enrollment' and a toggle switch labeled 'Text Enrollment' with a circled '1' next to it. Below the toggle is the instruction: '\*Enable and authorize text banking on the mobile device below.' There is a text input field for 'SMS TEXT NUMBER \*' with a circled '2' next to it. Below the field is a note: '\* - Indicates required field'. To the right of the field is a checkbox labeled 'Agree To Terms' with a circled '3' next to it. At the bottom right of the form is a 'Save' button with a circled '4' next to it. The bottom screenshot is a dark-themed confirmation screen titled 'Enrollment Successful' with a checkmark icon. It contains the text: 'You have successfully enrolled in text banking. Before you can view your accounts on your text device, you must configure your accounts. Would you like to do so now?'. At the bottom of the screen are two buttons: 'Close' and 'Visit Preferences', with a circled '5' next to the 'Visit Preferences' button.

In the **Settings** tab, click **Text Enrollment**.


1. Toggle the **Text Enrollment** switch from "Off" to "On."
2. Enter your SMS text number.
3. Read the terms and conditions and check the box next to "Agree To Terms."
4. Click the **Save** button when you are finished.
5. Click the **Visit Preferences** button to be taken to the Accounts feature.



**Note:** Once you've signed up for Text Banking you should receive a text confirmation.



The screenshot shows a mobile banking application interface. At the top, there is a header for 'CHECKING ACCOUNT - CK XXXX' with a blue circle '6' next to it. Below the header, there are two tabs: 'VISIBLE' and 'SMS/Text'. The 'SMS/Text' tab is selected, and a blue circle '7' is next to it. Underneath the tabs, there is a section for 'SMS/Text Enrollment' with a toggle switch currently set to 'Off'. A blue circle '8' is next to the toggle switch. Below the toggle switch, there is a text input field for 'SMS/Text Display Name' containing the text 'CHEI'. A blue circle '9' is next to the input field. To the left of the input field, there is a pencil icon and a blue circle '9' next to it. To the right of the input field, there are 'X' and checkmark icons.

6. Select an account you want to enroll in text banking.
7. Click the SMS/Text tab.
8. Toggle the **SMS/Text Enrollment** switch from “Off” to “On.”
9. (Optional) Click the  icon to change the SMS/Text Display Name. Make your changes and click the check mark to save it.

Commands for Text Banking	
Text Command Options to	226563 for the Following Information:
BAL or BAL <account nickname>	Request account balance
HIST <account nickname>	Request account history
XFER <from account nickname> <to account nickname> <amount>	Transfer funds between accounts
LIST	Receive a list of keywords
HELP	Receive a list of contact points for information on text banking
STOP	Stop all text messages to the mobile device (for text banking and SMS alerts/notifications) this will also stop text SAC codes to this phone number
START	Enable message send/receive for text banking

# Services

## Change Personal Info

If your current address ever changes and you need to update your contact information, you can submit a request to Columbia Bank for one or all of your accounts. Once it is approved, the address change will be completed within two business days.

### Address Change

Complete and submit this form to change your address information for one or more of your accounts.

Select one or more accounts to change address. Please select at least one account.

<input type="checkbox"/> COMMERCIAL CHECKING - XXXX6789
<input type="checkbox"/> COMMERCIAL LOAN - XXXX7890
<input type="checkbox"/> COMMERCIAL CHECKING - XXXX5678
<input type="checkbox"/> CERTIFICATE OF DEPOSIT - XXXX3456
<input type="checkbox"/> CONSUMER CHECKING - XXXX1234
<input type="checkbox"/> SAVINGS - XXXX2345
<input type="checkbox"/> 120 DAY CD - XXXX2508
<input type="checkbox"/> REGULAR CHECKING - XXXX2431

\* - Indicates required field

**ADDRESS 1 \***  
222 testing way

**ADDRESS 2 \***  
Address 2

**CITY \***  
Austin

**STATE \***  
Texas

**ZIP \***  
30066

**PHONE COUNTRY**  
United States

**HOME PHONE \***  
(678)296-2962

**WORK PHONE \***  
(678)292-4711

**CELL PHONE \***  
Cell Phone

**E-MAIL ADDRESS \***  
joecody1@me.com

In the **Services** tab, click **Change Personal Info**.

1. Choose the accounts that need the address change.
2. Update your contact information.
3. Click the **Submit** button when you are finished.

# Services

## Statement Delivery

You can change how you like to receive your monthly statements for your account(s). Paper statements are physically delivered to you in the mail, while E-Statements are available for viewing online. You will receive an email when your E-Statement is available for viewing.

Statement Delivery

Account	Delivery Type	Address
Internal [REDACTED]	E-Statement	[REDACTED]
Personal Savings [REDACTED]	E-Statement	[REDACTED]

[View E-Statement Delivery Agreement](#)

Delivery Preferences


Account  
Internal [REDACTED]

Delivery Type  
E-Statement

Email Address  
[REDACTED]

Save

In the **Statements** tab, click the **Statement Options**.

1. Edit or add a delivery destination by clicking the  icon at the end of the account line.
2. Use the drop-down to choose your "Delivery Type".
3. Add or change your email address. Please note, to change the email address where the E-Statement notification is sent, use the Change Personal Info option under Services
4. Click the **Save** button when you are finished.

# Services

## Themes

Columbia Connect offers our standard theme and large font theme. Once you select the theme you prefer, the changes are applied immediately across all of your devices.


Themes

Please select a theme from the theme library below.

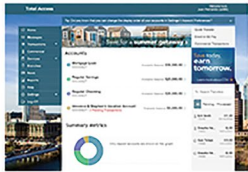
Changing the theme will affect the way the app is displayed.

1

**Standard**



**Large Font**



In the **Settings** tab, click **Themes**.

1. Click on a theme to change it.

# Locations

## Branches and ATMs

If you need to locate a Columbia Bank branch or ATM, the interactive map in Columbia Connect and shown below can help you find locations nearest you. If your device's location services feature is turned off or your location is unavailable, a general list of branches appears.

**find a location** **search by state**

City/State Search oregon (56) print page

filter by expert  
filter only locations with

Drive-Up Banking  
 Walk-up ATM  
 ATM accepts deposits  
 Night Deposit  
 Safe Deposit Box  
 Open On Weekends

**results**

**Astoria Branch**  
1122 Duane St  
PO Box 28  
Astoria, OR 97103  
ph: (503) 325-2228

**Beaverton Branch**  
3600 SW Cedar Hills Blvd  
Beaverton, OR 97005  
ph: (503) 643-7643

**1122 Duane St  
Astoria, OR 97103  
(503) 325-2228**

Walk-up ATM  
Drive-Up Banking  
Night Deposit  
Safe Deposit Box

**Location Hours**  
Pacific Daylight Time

	Lobby	Drive-Up	ATM
Monday	9:00 - 5:00	8:30 - 5:00	24 Hours
Tuesday	9:00 - 5:00	8:30 - 5:00	24 Hours
Wednesday	9:00 - 5:00	8:30 - 5:00	24 Hours
Thursday	9:00 - 5:00	8:30 - 5:00	24 Hours
Friday	9:00 - 5:00	8:30 - 5:00	24 Hours
Saturday	Closed	Closed	24 Hours
Sunday	Closed	Closed	24 Hours

Lobby is open today until 5:00 pm  
Drive-Up is open today until 5:00 pm

get directions  
send address to email  
send address to mobile

Select the **Locations** tab.

- Details about branches or ATMs are displayed on the left-hand side.
- You can locate a Columbia Bank branch or ATM by using the filter options.
- The search bar allows you to find locations within a specific location.
- The State drop down allows you to filter locations by state.
- Click a "branch name" link for additional information.

