

The My Accounts widget on the My Accounts home page is universally important to all businesses. Deposit and loan accounts are available for reconciliation, research, and reporting purposes.

**My Accounts:** filtered list of Deposit and Loan accounts. View balances; hover over an account for a "quick peek"; select an account to view details.

Old National Accounts Transfer

Tax ID ONB Mobile SMB Client Two

DEPOSIT ACCOUNTS	\$20.84
INTERNAL CHECKING *0800 <span>Quick peek</span>	
Available <span>**\$9.42</span>	
Current <span>\$11.92</span>	
INTERNAL CHECKING *0866 <span>Quick peek</span>	
Available <span>**\$4.34</span>	
Current <span>\$4.34</span>	
BASIC SAVINGS - INTERNAL *0168 <span>Quick peek</span>	
Available <span>**\$2.51</span>	
Current <span>\$2.51</span>	
BASIC SAVINGS - INTERNAL *0171 <span>Quick peek</span>	
Available <span>**\$2.07</span>	
Current <span>\$2.07</span>	
LOAN ACCOUNTS	\$11.00

The selected TIN determines the Deposit and Loan accounts that display (may be CIF, CIS, or member number for your FI). OR select **View All Tax IDs** to see all deposit/loan accounts together.

Accounts Transfer

Tax ID View All Tax IDs

DEPOSIT ACCOUNTS	\$317,532.40
+ CLASSY CATERING	\$34,298.82
+ CLASSY EVENTS	\$283,233.58
LOAN ACCOUNTS	\$2,578,496.83

\*\*This balance may include overdraft or line of credit funds.

**Tips:**

- Business Admins can see all TINs and all accounts within each TIN.
- Business Admins can set up business users with access to all accounts, or narrow by TIN and account.

**Account Details**

1. Jump to another TIN.
2. Jump to another account.
3. **Transfer** money (internal), **Export** transactions (formats below), **Print** the page
  - a. CSV – format for downloading into a spreadsheet
  - b. OFX – format that’s accepted for importing to Quicken and QuickBooks
  - c. \* QFX – Web Connect for Quicken
  - d. \* QBO – Web Connect for QuickBooks
4. Change the date range - amount of history depends on how much is retrieved from/provided by the financial institution host.
5. Search for a transaction – good for research purposes

Account History

Classy Catering ▼


Operating Checking 9999-10001 ▼ Current **\$21,835.13**

Account Details ▼ Available\*\* \$21,835.13

Transfer Export Print

< Feb 17, 2019 - Mar 18, 2019 30 days ▼ >

Narrow by items containing:  
e.g. AT&T, check, 5.00

Date ▼	Description	Amount	Balance
 There are no transactions within this date range.			

0

C ± % +  
7 8 9 ×  
4 5 6 -  
1 2 3 +  
0 . =

\*These show if enabled as options in Online Banking.