

Digital Banking Frequently Asked Questions (FAQs)

Common Digital Banking Errors

I'm not able to log in to online banking when I click on the login button.

You need to clear your cache in your internet browser to remove all cookies. If you need further assistance, please contact us.

I can't remember my username name or password.

You can recover your account by going through the "Forgot Password?" steps.

Why am I getting the digital banking error: "Your account needs attention"?

This error is present during the log in process and typically means that your account has been locked. This can happen for a variety of reasons but is easily resolved. Please call us at 740-345-6608 for assistance with unlocking your account.

Why am I getting the digital banking error: "Please verify your information and try again"?

This error is present during the login process and typically means that your credentials didn't match our records. Try entering your credentials one more time. If the error persists, please call us at 740-345-6608 for further assistance.

Why am I getting the digital banking error: "Oops: The information you provided doesn't match what we have on file."?

This error is present during the login process and typically means that your account information does not match our records. Please contact us to confirm we have the correct phone number and username on record.

Why am I getting the digital banking error: "Incorrect phone number"?

This error is present during the enrollment process and means that the phone number you entered does not match the phone number we have on file. If you have an alternative phone number, you can try again. If you would like to update your phone number in our system or need other assistance, please contact us.

Why am I getting the digital banking error: "Does not meet username or password requirements"?

This error is present during the enrollment process or when updating credentials. Click on Show Rules below the username and password field to see the credential requirements.

Why am I getting the digital banking error: "It looks like you've already enrolled"?

This error is present during the login process and typically means that our records show that you have previously created an account with us. If you forgot your username and password, on the login page, click "Forgot?" and follow the steps to recover your account.

Transfers/Transactions

How do I make a transfer between my accounts in digital banking?

To transfer between your credit union accounts in digital banking:

- Log In and open the Menu
- Select Transfers > Make a Transfer
- Select your To and From account and amount
- Click More Options to change the frequency and date if desired
- Click Submit

Will my previously-created scheduled transfers still work in the new digital banking system?

Yes, all existing scheduled transfers in the previous digital banking system have been moved to the new system.

Where can I view pending transactions on my account?

- Log in
- Select the account you want to view
- To view all account activity, view the Activity tile **or** Transactions in the mobile app

How do I search for transactions in digital banking?

Account transactions can be searched in digital banking by amount, date, tags, etc.

Online:

- Log in
- Select **Accounts**
- In the Accounts section, select the account you would like to search
- In the Activity section, select the magnifying glass icon
- Click on the Search and Sorting options to open **Advanced Search** in digital banking
- On the Advanced Search window, you can select specific search filters and select **Search**

Mobile app:

- Log in
- Select your account you want to search
- Select Transactions
- Tap the magnifying glass icon
- Tap the  icon to use Advanced Search options

How do I add a tag, note, or image to a transaction in digital banking?

You can add notes, tags, and images to any transaction inside of digital banking. To begin:

- Log in
- Select any account
- Select Transactions (in mobile)
- Select the Transaction you wish to edit and pull up the transaction's details page
- Select the appropriate icon for one of the following:
 - Add Tags
 - Add Notes
 - Add Images
- Follow the on-screen prompts to update the transactions
- Close the transaction detail page or tap < Transactions in mobile

Any tags, notes, and images attached to transactions will be accessible on all devices when you log in to digital banking in the future.

How do I download transactions in digital banking?

Account transactions can only be downloaded in online banking (excluding the app).

- Log In
- Select **Accounts**
- In the Accounts section, select the account you like to download transactions for.
- In the Activity area, select the first icon  next to the print and search icon.
- On the **Download Activity** window, select the **Date range** and **File Type** and click **Download**.

How do I print transactions in digital banking?

Account transactions can only be printed in online banking (excluding the app).

- Log In
- Select the Accounts tab
- In the Accounts section, select the account
- On the Activity section, select the printer icon. Only transactions that show in the Activity section will print.
- A print screen appears with a print preview and print configuration options.
- Using the dialog, configure the print settings and select Print.

BillPay

Are my bill payment accounts being transferred automatically or do I need to set them up again in the new digital banking?

Bill payment accounts will be automatically transferred and do not need to be set up again.

Will my scheduled bill payments carry over to the new digital banking?

Any scheduled bills will be paid as scheduled and scheduled payments will carry over to the new digital banking experience.

Messages

How do I send a message in digital banking?

Whatever device you are on, it's easy for you to start a secure conversation with the credit union:

- Log in to digital banking via the **Login** button on the website or via the mobile app.
- From a desktop, click on the Message menu item, or select **Message** from the dashboard of mobile banking.
- Select **Type a Message**.
- Type your message and click **Send**.

A member service representative will respond shortly.

Alerts

Will my previously-created account alerts work in the new digital banking system?

Alerts will need to be re-entered in the new system. To set up alerts in digital banking:

- Log in
- Select the account you would like to set up an alert for
- Click Alert Preferences in the menu
- In the Balance alerts section, select Add alert.
- Select Above or Below, and then input a dollar amount.
- In the Alert/Notify by field, select Email, Text message, or In-app message.
- Select Add Alert to save the alert
- Repeat steps for Transaction alerts

How do I delete an alert in digital banking?

Alerts can be deleted at any time in digital banking.

- Log in
- Select the account you would like to edit an alert for
- Click Alert Preferences in the menu
- Under Alerts
- Click Edit next the alert you would like to change
- Click the Trashcan icon or click Remove in mobile

How do I edit an existing alert in digital banking?

Alerts can be edited at any time in digital banking.

- Log in
- Select the account you would like to edit an alert for
- Click Alert Preferences in the menu
- Under Alerts
 - Click Edit next to the alert you would like to change
 - Change your criteria for the alert
 - Click Save

eStatements

Will I need to re-enroll in eStatements with the new digital banking?

You will not have to re-enroll in eStatements. If you have not yet enrolled in eStatements, we encourage you to do so. The new digital banking site will make accessing your account and statement information easier than ever.

How do I view my account statements and tax documents in digital banking?

Account statements and tax documents can be downloaded from digital banking. These are only available for accounts already enrolled in eStatements.

- Log In
- A shortcut icon called Documents is available on your Dashboard
- Or you may click on any account listed
- Click on Documents from the Account Details page in the options menu
- Statements and Taxes will be listed for each year available

Updating Information

Can I change my phone number, email address, or primary address in digital banking?

Yes, you can update your phone number, email address, or primary address in digital banking.

- Log In
- Click on the User Profile icon. If on desktop, click the User Profile icon, then Settings
- Click Edit next to your phone, email, or address
- Verify your password
- Edit your contact information
- Click Save

Phone and email updates will happen immediately. All address updates will be reviewed by a Member Service Representative and you may be contacted for additional information.

How do I change my username or password in digital banking?

You can change your username or password at any time in digital banking.

To change username:

- Log in
- Select your username icon in the top right corner or menu in mobile banking
- Select Settings and then select Security option on the left side menu
- In the Username field select Edit
- Enter your current password when prompted
- Change your username and select Save



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www.truecore.org

To change password:

- Log in
- Select your username icon in the top right corner or menu in mobile banking
- Select Settings and then select Security option on the left side menu
- In the Password field select Edit
- Enter your existing password, and then enter a new password
- Select Save

Phone and email updates will happen immediately. All address updates will be reviewed by a Member Service Representative and you may be contacted for additional information.

How do I rename or personalize an account name in digital banking?

You can rename any account in digital banking.

- Log in
- Select an account from the Accounts section
- Select Settings from the options menu
- Next to the account name, select Rename
- Type the new name, and then select Save

How do I change the order my accounts are displayed in digital banking?

You can rearrange the order your accounts display in digital banking to reflect the sequence you want.

- Log In
- From the Accounts click on the three dots and click Organize Accounts in online or click the opposing arrows in mobile
- Drag and drop the accounts to rearrange the order
- Click Done

Using Quicken or QuickBooks

What do I have to do to update Quicken, QuickBooks and Mint after the digital banking update?

For the first time logging in to Quicken, QuickBooks or Mint after the digital banking update, you will need to reconnect all accounts in order to reactivate your feed. You will need to do the following actions on Quicken:

- Log in to the new online banking system first to verify access and set up Two-Factor Authentication
- Log in to your Quicken software
- **Always back up your software before performing any new action**
- Find the account you wish to update
- Click the Actions option on the account
- Click Edit Account details
- Select Online Services and Reset Account or Deactivate/Reactivate account
- Ensure that you are using Express Web Connect option (Direct Connect is not supported)
- Insert your username and password
- Select how you would like to receive your one-time passcode
- Complete the setup and review your transactions

You may have to perform this action for each share on your account in order for all of them to link. QuickBooks and Mint follow the same process but have varying on-screen prompts.

Misc. Online

Which Internet browsers can I use to access my accounts online?

Recommended browsers (current major release):

- Microsoft Edge
- Firefox
- Safari
- Chrome

Note: Microsoft no longer supports Internet Explorer versions older than 11.0, and security updates are not available. Please download one of the browsers listed above.

Safari versions below 10.1.2 are not compatible with the initial log in process. To complete the initial log in process, upgrade to the latest version of Safari, or use Chrome or Firefox.

The following types of browsers and tools are not recommended for use with digital banking:

- Beta versions
- Embedded browsers within Personal or Commercial Financial Management Software

How do I log out of digital banking?

When accessing on a browser, click on your name at the top right-hand corner of the screen and select "Sign Out". You will be taken to our website homepage and your session will be closed.

What is the inactivity time-out period for digital banking?

For your security your account will time-out after 10 minutes of inactivity.

Misc. Mobile

How do I change my profile photo in mobile banking?

- Tap the slideout menu, and then select Settings.
- On the Profile screen, select the pencil next to the end-user profile image.
- Choose to use an existing photo or use the device's camera to take a new photo.
- On the Move and scale screen, adjust the photo placement within the frame as desired.
- Select Done.

How do I log out of the mobile app?

When you are using the mobile app, there is not a log out button to push. You can exit the app by going to a different app or your home screen. Each time you navigate away from the app, your active session is ended, which serves the function of a log out button. When you navigate back to the app, you will be asked to re-authenticate, and if you have quick access features such as FaceID, TouchID, or passcode log on, you can gain access quickly each time.

If you want to remove the connection between your device and your account altogether, you can go to the Menu > Settings > Remove Profile. This will remove all association between your account and the mobile device and app you are using. Each time you attempt to access the app after this, you will have to put in the full username, password, and 2-Factor authentication to authorize your account on that device.

What minimum software versions are required for the mobile app?

The Apple mobile app requires a minimum version of iOS 16. The Android mobile app requires a minimum version of Android 5.0.

How do I set up Touch ID for iOS?

- Tap the slideout menu and select Settings.
- Tap Security in the menu.
- Tap the toggle next to Touch ID.
- Select Enable Touch ID.

Can I customize my mobile banking dashboard on multiple devices?

Yes, you can!

You can customize a unique Dashboard set up for each of your devices. Changes to one device's Dashboard layout will not affect the arrangement on other devices.

