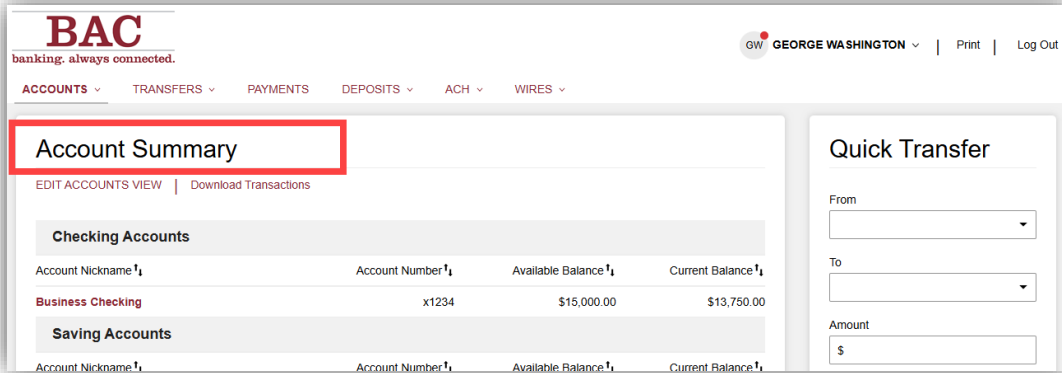


1. Accessing Account Summary and History

- Login to Digital Banking.
- Account Summary homepage is the default view



BAC
banking. always connected.

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ACCOUNTS ▾ TRANSFERS ▾ PAYMENTS DEPOSITS ▾ ACH ▾ WIRES ▾

Account Summary

EDIT ACCOUNTS VIEW | Download Transactions

Checking Accounts

Account Nickname	Account Number	Available Balance	Current Balance
Business Checking	x1234	\$15,000.00	\$13,750.00

Saving Accounts

Account Nickname	Account Number	Available Balance	Current Balance

Quick Transfer

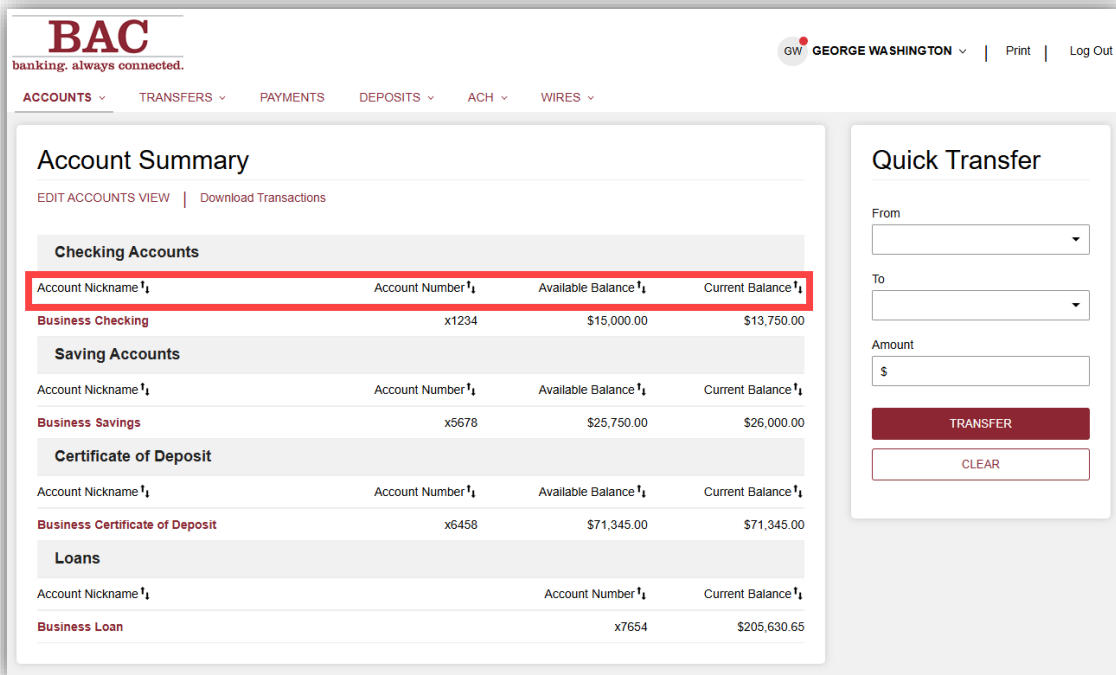
From:

To:

Amount:

2. Account Summary Overview

- Display's basic information about each account:
 - Account nickname (user-defined or system)
 - Available balance (checking, savings, and certificates)
 - Current balances (loans)
 - Last four digits of the account number



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Account Summary

EDIT ACCOUNTS VIEW | Download Transactions

Checking Accounts

Account Nickname	Account Number	Available Balance	Current Balance
Business Checking	x1234	\$15,000.00	\$13,750.00

Saving Accounts

Account Nickname	Account Number	Available Balance	Current Balance
Business Savings	x5678	\$25,750.00	\$26,000.00

Certificate of Deposit

Account Nickname	Account Number	Available Balance	Current Balance
Business Certificate of Deposit	x6458	\$71,345.00	\$71,345.00

Loans

Account Nickname	Account Number	Current Balance
Business Loan	x7654	\$205,630.65

Quick Transfer

From:

To:

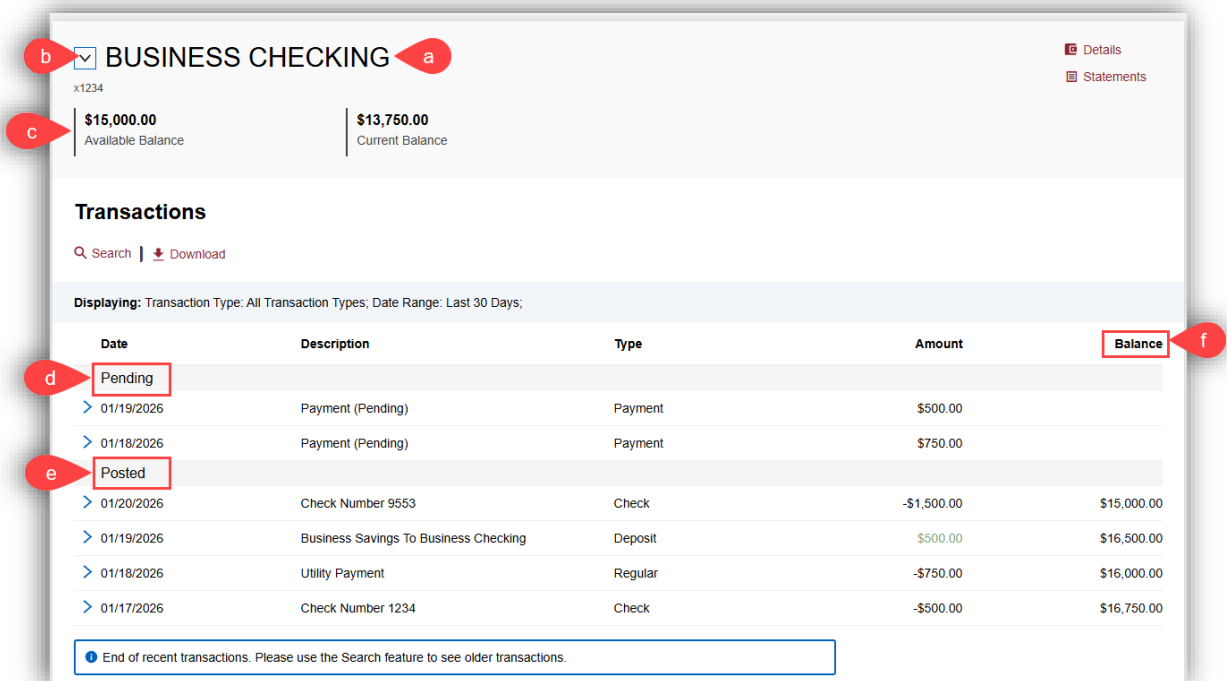
Amount:

TRANSFER

CLEAR

3. Viewing Account History

- Select the applicable account nickname to view up to 30 days of transaction history including posted and pending transactions.
- Select the down arrow at the top next to the account nickname to view a list of all the accounts that the user has access to.
- View the available and current balances at the top of the page.
- Pending transactions display at the top of the transaction list in the “Pending” section.
- Posted transactions display below the “Posted” transaction section.
- View the running “Balance” column to the right of the transaction line item.



BUSINESS CHECKING x1234

\$15,000.00 Available Balance | **\$13,750.00** Current Balance

Transactions

Search | Download

Displaying: Transaction Type: All Transaction Types; Date Range: Last 30 Days;

Date	Description	Type	Amount	Balance
Pending				
> 01/19/2026	Payment (Pending)	Payment	\$500.00	
> 01/18/2026	Payment (Pending)	Payment	\$750.00	
Posted				
> 01/20/2026	Check Number 9553	Check	-\$1,500.00	\$15,000.00
> 01/19/2026	Business Savings To Business Checking	Deposit	\$500.00	\$16,500.00
> 01/18/2026	Utility Payment	Regular	-\$750.00	\$16,000.00
> 01/17/2026	Check Number 1234	Check	-\$500.00	\$16,750.00

End of recent transactions. Please use the Search feature to see older transactions.

4. Searching for Transactions

- Select the “Search” link under “Transactions” on the account history view.
- Select the transaction type from the “Transaction Type” dropdown field.
- Select the date range from the “Date Range” dropdown field.
- Enter a description to search by description, if applicable.
- Select the “Search” button.
- Select the “Arrow” to the left of the transaction date to view the transaction details.

Transactions

a [Search](#) | [Download](#)

SEARCH

Transaction Type
b

Date Range
c

Description
d

Search by Amount & Check Number
 e

f <input type="button" value="v"/>	01/20/2026	Check Number 9553	Check	-\$1,500.00	\$15,000.00
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TRANSACTION DETAILS

Transaction Date
01/20/2026

Posted Date
01/20/2026

Type
Check

[View Check](#)

5. Searching for Transactions by Amount

- Select the “Search” link under “Transactions” on the account history view.
- Select the transaction type from the “Transaction Type” dropdown field.
- Select the date range from the “Date Range” dropdown field.
- Enter a description to search by description, if applicable.
- Select the “Search by Amount & Check Number” link.
- Select the “Amount” or “Amount Range” radio button.
- Enter the amount(s) in the appropriate fields.
- Enter the check number in the “Check Number” field, if applicable.
- Select the “Search” button.
- Select the “Arrow” to the left of the transaction date to view the transaction details.
- Select the “X” in the right corner to close the “Transaction Details”.

Transactions

[Search](#) | [Download](#)

SEARCH ×

Transaction Type
All Transaction Types b

Date Range
Last 30 Days c

Description d

Search by Amount & Check Number e

☒ Amount ☐ Amount Range f

Amount g

Check Number h

i

j ✓ 01/20/2026 Check Number 9553 Check -\$1,500.00 \$15,000.00

TRANSACTION DETAILS k ×

Transaction Date
01/20/2026

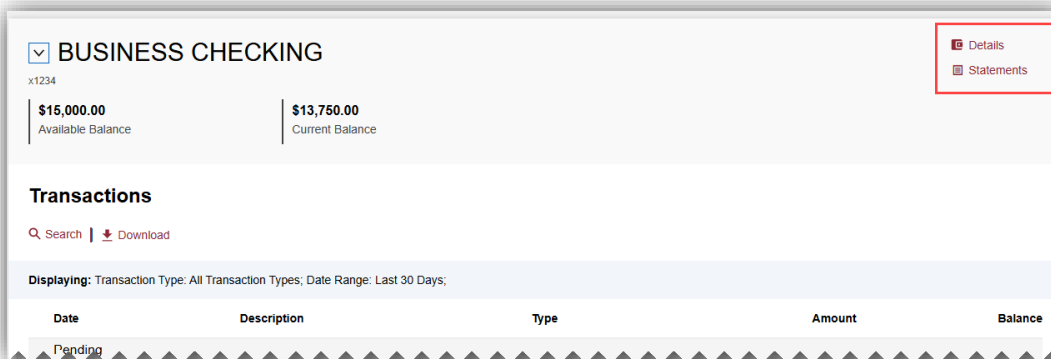
Posted Date
01/20/2026

Type
Check

[View Check](#)

6. Additional History Features

- Statements link: Allows users to search for statements.
- Details link: Opens the account details popup.



7. Account Details Pop-Up

- Select the “Details” link.
- Review account details.
- Select the “Change Account Nickname” link to change the account nickname, if applicable.
- Make the desired change and select “Save”.
- Select the “Show Full Account Number” link to view the full account number, then select the “Hide Full Account Number” link to hide full account number, if applicable.
- Select the “Close” button to exit the “Account Details”.

