

Online Banking Conversion Information

As part of our efforts to make your banking experience better we will soon be upgrading our Online Banking platform to a more user-friendly and innovative system. This upgrade will be completed by **Monday, June 5, 2017**. Please use these resources to help you successfully navigate your new online banking experience. If you don't find what you're looking for, or need further assistance, contact our Online Support Teams.

Conversion and Online Banking Support Contact Numbers

We are here to help you with the transition.

Personal Online Support: 321-784-8333

Commercial & Small Business Online Support: 407-601-3608

Support Hours: 8:30 a.m. to 5:00 p.m., Monday - Friday

Logging In

To log in to your account, please do the following.

1. Go to Sunrise Bank's web site at www.SunriseBank.com. Find and click the Online Banking login module. It is located at the top the web page.
2. In the Access ID box, type your access ID. (**This did not change**)
3. In the Passcode box, type your passcode (**Your temporary passcode is your five digit zip code plus the last four digits of your Tax ID or Social Security Number, no dashes or spaces**), and click Log In. *Example: Zip Code 32931 + Social Security Number 123-45-6789 = Passcode 329316789*
4. Once you log in to the new system, you will be prompted to change your password. **Passcodes are case sensitive**. Simply follow the step by step instructions for your login procedures. You will also be required to setup security questions to assist with identification.

Change Passcode

Your passcode has expired. Please select a new one that is not based on your current passcode.

Temporary Passcode:

New Passcode:

Confirm New Passcode:

Your passcode:

- Must be at least 8 characters long.
- Must contain at least 1 numeric and 1 alpha character.
- Cannot be the same as your Access ID.
- Must be different from any passcode used in the last 6 months.
- Must be different from any of your last 6 passcodes used.
- Is case sensitive.

TIPS FOR STRONG PASSCODES:

- Try using special characters in place of letters. (e.g. use symbols like @ or ! in place of "a", "e", "i", "o" or "u")
- Try not to use dictionary words. They are easy to guess.
- Avoid using passcodes based upon your name, address, or other personal information.

For tips on choosing a secure passcode you can remember, [click here](#).

Basic Services Home Tab

The Home tab is the Online Banking start page. It provides an overview of your Online Banking accounts in a compact, simplified format. When you need more detail than the Home tab provides, it has links to let you jump directly to the appropriate pages.

On the Home tab, you can do the following.

- See basic information on the accounts
- If you have more than six accounts, set certain ones as Favorites
- See your Spendable Balance
- See new messages that come into your message inbox
- See service offers from Sunrise Bank

The screenshot shows the AnyInstitution online banking Home tab. At the top, there is a navigation bar with the logo and the tagline "your money. your way.". To the right of the logo, there are links for "Welcome John Doe", "Log Out", "Contact Us", "2 Messages", and "Alerts". Below the navigation bar is a green menu with options: "Home", "Accounts", "Bills & Payments", "Transfers", "Finance Center", and "PFM".

On the left side, there is a dark sidebar with a "2 of 7 Unread Messages" notification. Below this, there are two message cards: one dated "Nov 17" about "About your account" and another dated "Jul 1" about "Personal Financial Manager Now Available!". At the bottom of the sidebar is a "SNAPCHECK DEPOSIT" banner with a "GET THE APP" button.

The main content area is titled "Home" and features a "Transfer" button. It displays account information under two tabs: "ALL ACCOUNTS" and "FAVORITES".

Money I Can Spend

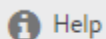
	Available	Previous Day
My Checking *0058 ★	\$3,002.81	-\$1,918.64
TOTAL	\$3,002.81	-\$1,918.64

Money I Owe

	Balance	N/A	
My Loan *0653 ☆	N/A	\$12,345.67	\$219.95 due Dec 31
My Credit Card *4389 ★	N/A	N/A	No payment due
TOTAL	\$0.00	\$12,345.67	

Money I'm Saving

	Available	Previous Day
My CD *8817 ☆	\$56,789.11	\$56,789.11
My IRA *7650 ★	\$98,765.43	\$98,765.43
My Savings *0056 ★	\$19,827.30	\$23,456.78
TOTAL	\$175,381.84	\$179,011.32




The Help icon is located near the top of each page. Clicking on this icon will provide specific help information to the page you are currently on as well as links to additional help topics.

Accounts Tab

You can manage your online accounts using the Accounts tab. This tab allows you to do any of the following.

- View account information, monthly statements, and transaction histories
- Transfer money between online accounts
- Download transaction histories into personal finance software, such as the Microsoft® Money and Intuit® Quicken®, or spreadsheets, such as Microsoft Excel®.
- View loan rates and loan payoff details
- View check images, statements, or other documents online

The main Accounts tab page lists information about the currently selected account, including the account balance and the date this balance was obtained.


Welcome John Doe ▾
Log Out
Contact Us
2 Messages ▾
Alerts ▾

Home
Accounts ▾
Bills & Payments
Transfers ▾
Finance Center
PFM

Spendable Balance

\$2,502.81

What's my Spendable Balance?

My Checking *0058	\$3,002.81
My Savings *0056	\$19,827.30
My IRA *7650	\$98,765.43
My Credit Card *4389	N/A

My Checking *0058

\$3,002.81

Available Balance ⓘ
as of 11/07/2016 1:00 AM

\$4,921.45

-\$1,918.64

Previous Day Balance ⓘ

Overdraft Protection
\$1,000.00

ACTIVITY
1 recent

ALERTS
no new alert(s)

[Transfer In](#)

[Transfer Out](#)

[More Details & Routing Numbers](#)

[Statements](#)

[Documents](#)

[Future View](#)

[Add An Account](#)

[Print](#)

[Help](#)

0% Intro APR ON PURCHASES AND BALANCE TRANSFERS

[View All](#)

11/06/2016 - 11/10/2016

[Download File](#)

[View Report](#)

[More options](#)

Date ▾	Description ▾	Category ▾	Credit ▾	Debit ▾	Balance
11/10/2016	Unposted: Direct Credit	***	1.00		-4,217.19
11/07/2016	Daily Ledger Balance	***			-1,918.64
11/07/2016	AFT SERVICE CHG	*** Charitable D... ▾		37.96	-4,218.19
11/07/2016	SERVICE CHARGE ADJUSTMENT	*** Select one ▾		208.88	-4,180.23
11/07/2016	OVERDRAFT FEE	*** Select one ▾	452.02		-3,971.35
11/07/2016	ATM SERVICE CHARGE FEES	*** Select one ▾		665.31	-4,355.91
11/07/2016	CHECK RETURNED	*** Select one ▾		155.37	-3,690.60
11/07/2016	CHECK	*** Select one ▾		532.97	-3,535.23
11/07/2016	EXTERNAL CASH ADVANCE	*** Select one ▾	934.81		-3,002.26

[Next 5 days](#)


[TOP](#)

Transfers Tab

You can schedule account-to-account funds transfers using the Transfers tab.

- View and schedule account-to-account funds transfers
- View and schedule account-to-external account transfers
- View and print transfers histories
- Pay Sunrise Bank loan bills online

The Transfers tab allows users to view their pending account-to-account funds transfers.

Welcome John Doe ▾ Log Out Contact Us 1 Messages ▾ Alerts ▾

Home Accounts ▾ Bills & Payments Transfers ▾ Finance Center PFM

Print this page Help

Transfers

Schedule Single Transfer

I want to ▾

Transfers to or from accounts at other financial institutions must be scheduled at least one business day in advance of the effective date of the transfer.

From: *
Balance: \$3,002.81

To: *
Balance: \$3,002.81

Transfer Description:

Amount: \$ *

Frequency:

Period:

Scheduled Date:

Create transfer template after this transfer is submitted

Cut-off Time: 3:30 pm CST
External Transfer Cut-off Time: 4:00 pm CST

Pending Transfers

Transfer Description	Amount	Date	Actions
need cash From: My Savings Sa... To: My Checking Che...	\$500.00	03/14/2016	<input type="button" value="I want to ▾"/>
College stipend From: My Checking C... To: External Checking	\$150.00		<input type="button" value="I want to ▾"/>

Recent Transfers

Transfer Description	Amount	Date
topup From: My Savings Savings *0056 To: My Checking Checking *0058	\$4,220.00	11/15/2016
add more From: My Savings Savings *0056 To: My Checking Checking *0058	\$3,000.00	11/15/2016

[View Transfer History >](#)

Messages Page

The Messages page is available via the Messages menu in the Welcome Center. You can read notifications from Sunrise Bank concerning your accounts using the Messages page. These messages can include answers to emailed questions, responses to requests for technical help, or messages generated automatically by the system, such as rescheduling a transfer due to insufficient funds.

You have access to the following services.

- Read notifications from Sunrise Bank
- Send secure (encrypted) messages to the Sunrise Bank
- Reply to received messages or broadcast messages from Sunrise Bank, or reply to system-generated alerts
- Send attachments with your messages

The Messages page appears as follows.


The screenshot shows the Messages page of a web application. At the top, there is a header with the logo for "AnyInstitution" (your money. your way.) on the left, and navigation links for "Welcome John Doe", "Log Out", "Contact Us", "1 Messages", and "Alerts" on the right. Below the header is a green navigation bar with links for "Home", "Accounts", "Bills & Payments", "Transfers", "Finance Center", and "PFM". The main content area has a "Messages" title and a "Note: All messages will be deleted after 120 days." Below this is a table of messages with columns for checkboxes, sent dates, subjects, and categories. A "Delete Selected Messages" button is located at the bottom right of the message list.

<input type="checkbox"/>	Sent	Subject	Category
<input type="checkbox"/>	11/15/2016 10:34:04 am CST	New Check Policy	General Account Information
<input type="checkbox"/>	9/12/2016 10:54:59 am CDT	Passcode Changed!	Security Related Message
<input type="checkbox"/>	10/27/2015 12:00:00 am CDT	test	Broadcast Message
<input type="checkbox"/>	7/1/2015 12:00:00 am CDT	Personal Financial Manager Now Available!	Broadcast Message

Notify Me Alerts Page

The Notify Me Alerts page is available via the Alerts option in the Welcome Center. You can select and configure automatic notifications to be sent to you when certain events occur using the Notify Me Alerts page. The Online Banking system provides three types of alerts. Account Activity alerts notify you of events on your accounts, such as balances, transfers, and deposits. Messaging alerts notify users of secure messages waiting for you on the website. Security alerts notify you of events that could potentially affect your online access.

The Notify Me Alerts page has a Contact Information section showing possible delivery modes, and three sub-tabs to organize the different alert types.



Welcome John Doe ▾
Log Out
Contact Us
1 Messages ▾
 🔔 Alerts ▾

Home
Accounts ▾
Bills & Payments
Transfers ▾
Finance Center
PFM

👤 Help

Notify Me Alerts

The Notify Me Alerts feature allows you to receive email and text notifications of important account related, security related activities and messages. [Click here](#) for important information about managing your email and text alerts.

Contact Information for Alerts

I want to ▾

Primary Email Address: johndoe@example.com

Mobile Phone: 302-456-1234

Secondary Email Address: johndoe2@example.com

Enroll to receive text alerts*

Click the "Enroll to receive text alerts" link above if you wish to receive text alerts on your mobile device. A text message containing a registration code will be sent to your mobile device*. Please enter the registration code provided in the message on the next screen to successfully enroll for text alerts.

* Carrier charges may apply.

Account Activity Alerts
Messaging Alerts
Security Alerts

I want to ▾

You can elect to be notified whenever any of the following activity occurs on the selected accounts. [Click here](#) for a definition of each alert.

Choose "Edit Account Activity Alerts" from the Actions menu on this header to set alerts and their delivery methods for one or more accounts. To set an alert for one or more accounts choose "Edit" from the "I want to..." Actions menu located on the row with each alert type.

Account Activity Alerts	# of Accounts Selected	Actions
with my balance	Not Set	I want to ▾
if account is overdrawn	1 Account	I want to ▾
if balance is higher than...	Not Set	I want to ▾
if balance is lower than...	1 Account	I want to ▾
if a check # clears	Not Set	I want to ▾
for deposits more than...	1 Account	I want to ▾
for transactions more than...	Not Set	I want to ▾
when account document is available	2 Accounts	I want to ▾
when account statement is available	Not Set	I want to ▾

Services & Settings Page

The Services & Settings page is available via the Contact Us link in the Welcome Center, or the All Services & Settings item in the Welcome menu. You can access a variety of links to help manage your online accounts using the Services & Settings page. You will have access to features including the following.

- Add new online accounts or services
- Change passcodes and security verification question/answer
- Activate security tokens
- Update address information
- Set an account to a "No View" state
- Reorder checks
- Order copies of documents, such as canceled checks, disclosure forms and loan agreements
- Request to stop payment on checks
- Customize your session
- Send questions or comments to Sunrise Bank through encrypted messaging
- Look up contact information for Sunrise Bank

The Services & Settings page appears as follows. (See next page)

Services & Settings


Quick Links - *Get the help you need faster*

Change passcode
Stop check payment


Change phone, email or
address
View statements &
documents

Reorder checks

Contact Us

 800-419-8804

Fax 512-493-2500

 Send a Secure
Message

All Services & Settings

Security Actions

Stop check payment

Preferences

Transaction categories
Add external transfer account
 Modify external transfer
 processing method
View statements & documents
Modify account access
Online accounts
 Add account
 Modify access & services

Banking Services

Mobile Management
Commercial Mobile Management
Request documents
Reorder checks

Security Settings

Change phone, email or
address
Change your:
 Access ID
 Passcode
 Security questions
Security code delivery
Request security token
 Activate token

Display Settings

Account nicknames
Default history configuration
Language

Other

Email marketing preference
Personal finance software
access

Any Institution
11950 Jollyville Rd
Austin, TX 78759

