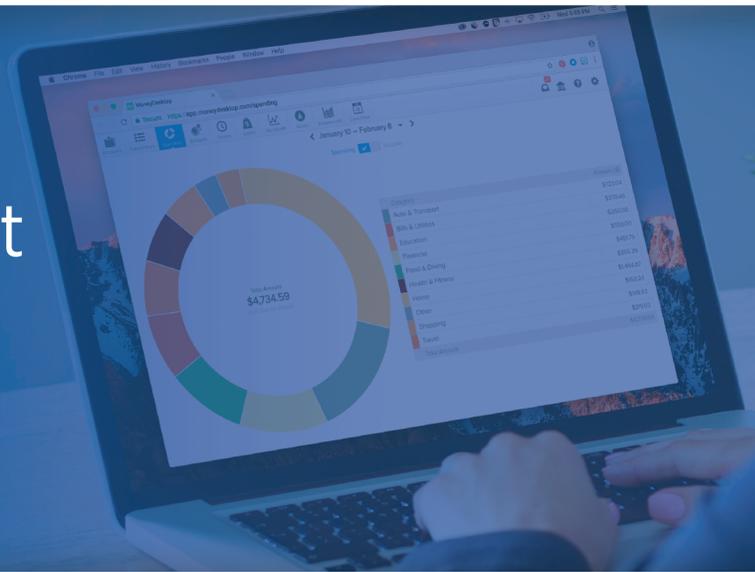# OLD NATIONAL BANK®

*Your bank. For life.*™

Money Management
Account

- **Red** represents debt accounts.
- Add An Account lets you add any account you want including loans, property, credit cards and investments.
- Click an account to edit it.

Note: An Online Banking user can choose to only aggregated accounts (which will then appear in the Outside Accounts widget on the Online Banking Home Page). A user doesn't need to use other Money Management features if they don't wish to.
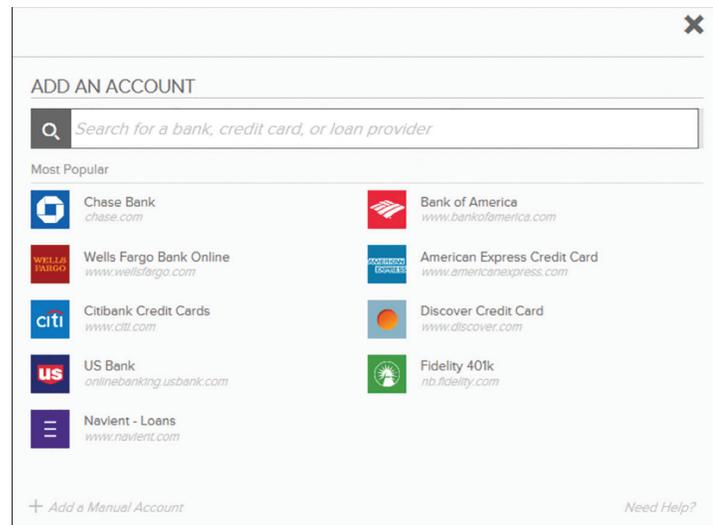
Edit an Account

- You can change the Account Name and Account Type.

- APY(%) lets you change the annual percentage yield.

- Link Status tells you if there's a connection problem.

- Click a bar in Account History to see monthly transactions.

- Mark an account as Business (B) or Personal (P).

- Manage Alerts lets you choose to be notified about this account via email or text.

- Exclude Accounts hides the account's data from the application.

- Mark As Duplicate merges two accounts together. Click this if you see two versions of the same account.
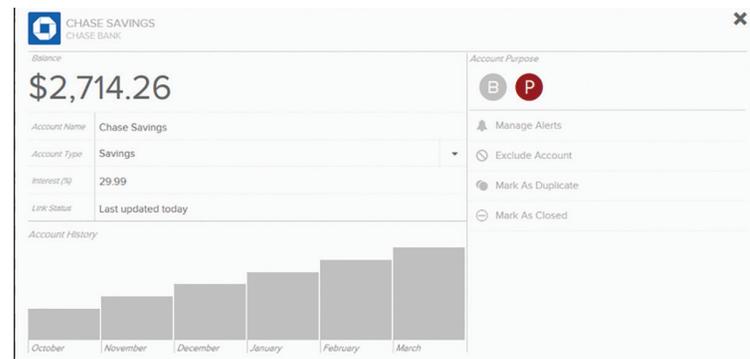
Note: Although you can't delete accounts at Old National, you can delete other accounts by clicking the trash can in the lower right.

- Click the Search Bar to find a specific savings, loan, credit card or investment account. Note that the URL listed in the search results won't necessarily be the one you typically use.

- Once you've found your institution, enter your UserID, password, and any security questions you might be asked.

- If an account requires attention, it will display a red or yellow exclamation mark. Click it and follow the prompts to resolve the issue.

- Add a Manual Account lets you add a manual savings, property, investment, etc. account.

Trouble adding an account?

OLD NATIONAL®
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1. Check all the available account types listed under an institution when you search. Sometimes mortgage, savings, credit card, etc. accounts are listed separately. You might also have to search for the specific account (i.e., "Old National Bank mortgage," as opposed to just "Old National Bank").

2. Verify your username and password with your institution to ensure your credentials haven't expired. Sometimes signing in can unlock a frozen account connection.

3. Turn off complicated security preferences (such as CAPTCHA and picture passwords) on your institution's site.

4. Allow your institution to accept third-party access by changing the preferences on their site.

5. Make sure you aren't simultaneously logged in to your institution's site on another tab or browser.

6. Make sure the software isn't waiting for your response to a security question.

7. If a connection breaks, you may have to enter your credentials again.

Broken accounts have a red or yellow exclamation mark in the top right corner of the account card.

To fix the connection:

1. Click the broken account
2. Click the red or yellow warning message in the Link Status section
3. Re-enter your login credentials

If the account continues to fail:

1. Log in to your financial institution's online banking to verify that your credentials are correct and that there are no holds on the account.
2. Add the account again, and pay special attention to the institution name to make sure you are attempting to add the correct account. Many institutions have similar names.

Note: If a connection is persistently down for more than two days, please submit a support ticket.

To delete an account:

1. Click the account you'd like to delete
2. Click Delete, which is located in the lower right corner of the edit screen

Note that you can't delete accounts at your primary financial institution.

To exclude accounts:

1. Click the account
2. Click Exclude from App

Note: Any data older than 90 days cannot be restored in the software if you want to re-add an account you've deleted.
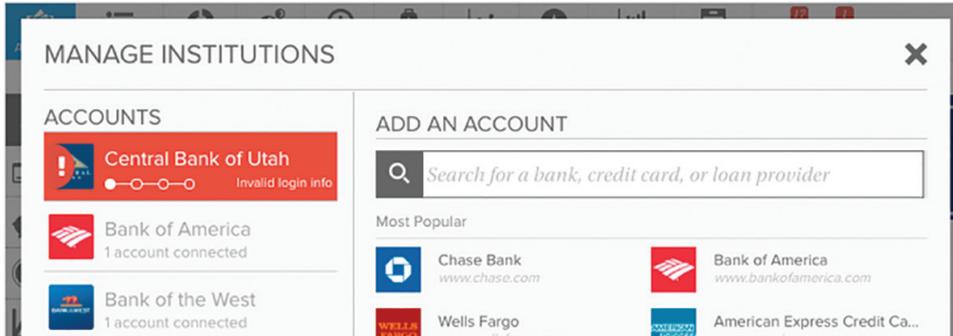
Seeing outdated accounts and paid-off loans? Sometimes the data we receive doesn't signal when an account is deleted. If you want us to delete an outdated account, submit a support ticket.
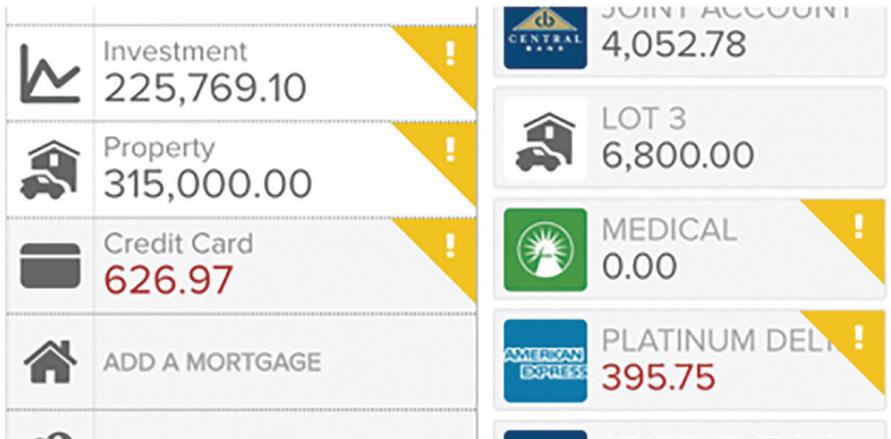
There are dozens of error messages to assist users.

Some examples:

Invalid Login Info (user can click the account to re-enter login info):

"Needs attention" errors (snippet from the Accounts landing page):

Seeing duplicate accounts?

You may occasionally see duplicate accounts from an automated feed. You can fix this problem by either merging the duplicate accounts or by deleting one of the duplicates.

To merge an account:

1. Click the duplicate account
2. Click Mark as Duplicate
3. Click Merge
4. Type MERGE into the appropriate box

Note: You can only merge accounts that come through the same automated feed.

To delete an account:

1. Click the account you want to delete
2. Click Delete (in the lower right corner)