

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	
Tax ID	ONB Mobile SMB Client Two
DEPOSIT ACCOUNTS	\$20.84
INTERNAL CHECKING *0800	Quick peek
Available	**\$9.42
Current	\$11.92
INTERNAL CHECKING *0866	Quick peek
Available	**\$4.34
Current	\$4.34
BASIC SAVINGS - INTERNAL *0168	Quick peek
Available	**\$2.51
Current	\$2.51
BASIC SAVINGS - INTERNAL *0171	Quick peek
Available	**\$2.07
Current	\$2.07
LOAN ACCOUNTS	\$11.00

The selected TIN determines the Deposit and Loan accounts that display.

OR select **View All Tax IDs** to see all deposit/loan accounts together.

Accounts	
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
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.			

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