View Deposit Account Activity

1. Click **Reports > Activity - deposit accounts**.

2. Select an **Output to** option.

3. Select an **Account** options.

4. Select a **Date range** option:

Option	Description
Specific date	Use to include information from a particular day.
From/To	Use to enter a custom date range.
Previous business day	Use to include information from the previous day's activity.
Since last download	Only for QuickBooks®. Used to download information since the last report download.

5. Select one or more **Transaction types** options:

Option	Description
All debits	Use to include all debit transactions.
All credits	Use to include all credit transactions.
All checks	Use to include all check transactions.

6. **Optional:** Select an **Amount** option:

Option	Description
Exact amount	Use to include transactions with a specific dollar amount.
Range min/max	Use to include transactions in a range of dollar amounts.

If a value is entered in only the Range min field, then the system assumes a specific dollar value. If you intend to select transactions up to $X, then you must enter 0.00 (or 0) in the min. field and the X value in the max. field. If no decimal is entered, the amount is interpreted as a whole dollar. |

7. **Optional:** Select a **Check serial number** option:

Option	Description
Exact number	Use to include checks with a specific number.
Range min/max	Use to include checks in a range of check numbers.

8. **Optional:** Click the **Include transaction detail** to include any recorded text information.

9. Click **Generate report**.

View Loan Activity

1. Click **Reports > Manage loans**.

2. If applicable, click a loan account to expand the row and reveal any associated notes.

3. Click **Actions** and select **Loan activity report**. 90 days of activity are shown by default.

View a Summary of Loan Notes

1. Click **Reports > Manage loans**.

2. If applicable, click a loan account to expand the row and reveal any associated notes.

3. Click **Actions** and select **Loan summary - notes**. All notes (open and closed) are shown by default.

View a Summary of Loan Commitments

1. Click **Reports > Manage loans**.

2. If applicable, click a loan account to expand the row and reveal any associated commitments.

3. Click **Actions** and select **Loan summary - commitments**. All notes (open and closed) are shown by default.

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Add Statement and Document Viewing

Note: eStatements are now available for Loan Accounts!

1. Click **Reports > Statements & documents**.

2. Click the **View and maintain document preferences** link.

3. Select a **Delivery Preference** for each entitled account/document type:
   - Paper
   - Online
   - Online & Paper

4. Click **Continue**.

5. Click **Save preferences**.

Messages are automatically sent to your online message center when new statements and documents are available for viewing.

View Statements and Documents

1. Click **Reports > Statements & documents**.

2. Select a **View** option:
   - Latest documents for account type - use to view documents from the last 31 days for an account type such as checking.
   - Documents for a specific account - use to view documents from the last 60 days for a particular account.

3. If the **Documents for a specific account** is selected, select an **Account** option.

4. Select a **Document type** option.

5. Click **Continue**.

Make an Internal Transfer

The Transfer Money – Internal page is used to transfer money between your accounts within People's United Bank.

1. Click **Transfers and Payments > Transfer money - internal**.

2. Select a **From account** option. This is the account that is debited.

3. Select a **To account** option. This is the account that is credited.

4. In the **Amount** field, type the dollar amount you want to transfer.

5. **Optional:** type a description of the transfer (up to 35 alphanumeric characters).

6. Select a **Frequency** option:

Option	Description
Today only	Sends the transaction once on today's date.
One time	Sends the transaction once on a date in the future.
* Weekly	Sends the transaction on the same day each week. The date provided in the **Next send on** field determines the day on which the transaction is sent.
* Every other week	Sends the transaction on the same day every other week. The date provided in the **Next send on** field determines the day on which the transaction is sent.
Twice a month - the 15th and last day of the month.	Sends the transaction on the 15th and last day of the month unless those dates fall on a day when transactions are not processed, such as a holiday.
* Monthly	Sends the transaction on the same date every month. The date provided in the **Next send on** field determines the day on which the transaction is sent.

Monthly - last day of the month	Sends the transaction on the last day of each month unless those dates fall on a day when transactions are not processed, such as a holiday.
* Every three months	Sends the transaction on the same day every three months. The date provided in the **Next send on** field determines the day on which the transaction is sent.
Every three months - last day of the month	Sends the transaction on the last day of the month, every three months.
* Every six months	Sends the transaction on same day every six months. The date provided in the **Next send on** field determines the day on which the transaction is sent.
Every six months - last day of the month	Sends the transaction on the last day of the month, every six months; unless those dates fall on a day when transactions are not processed, such as a holiday.
* Yearly	Sends the transaction on the same date every year. The date provided in the **Next send on** field determines the day on which the transaction is sent.
Custom	Sends the transaction based on a custom schedule with dates you specify. At least one date is required but only 25 custom dates can be scheduled at one time.

7. If applicable, type the start date of the recurring transfer in the **Next send on** field. Recurring and one-time future dated requests must be scheduled to start on non-holiday weekdays (Monday through Friday). Recurring requests that fall on non-processing days are automatically moved to either the previous or next processing day, depending on which of the **Processing options** you select.

8. If applicable, select an **End on** option for the recurring transfer:

Option	Description
Continue indefinitely	Sends the transaction indefinitely using the **Frequency** you defined.
Continue until this date	Sends the transaction until the date you specify. If this option is selected, enter a date in the adjacent field.
Continue for this many occurrences	Sends the transaction on the Frequency selected for a set number of times. For example, if you select **Weekly** for the **Frequency** and enter 4 for the occurrences, the transaction is sent on the same day every week for four weeks.

9. If applicable, select one of the **Processing options** in the event that the transfer request falls on a non-processing date. A processing option is not needed for a one time request.

10. Click **Continue**.

11. Verify the transfer as needed and perform one of the following actions:
    - Click the **submit for approval** link to submit the transfer for approval by other users in the company.
    - Click **Approve** to approve and schedule the request.
    - Click **Transmit** to approve and transmit the request.

Create a Transfer Template

1. Click **Transfers and Payments > Transfer money / Manage templates**.

2. Click the **Add a template** link.

3. Type a unique name in the **Template name** field (up to 20 alphanumeric characters).

4. Select an **Action** option: Debit (default) or Credit. A credit action sets up a many-to-one transfer template that credits the main account, while a debit action sets up a one-to-many transfer template that debit the main account.

5. Select a **Main account** option. This account is the funding account for outgoing transfers and the destination account for incoming transfers.

6. In the **Maximum transfer amount**, type the maximum dollar amount that can be transferred into or out of the main account per detail account.

7. **Optional:** Type a description of the transfer in the **Description** (up to 36 alphanumeric characters).

8. Set up **Detail Accounts**:
   o Click the **Account** drop-down arrow and select an account. This account cannot be the same as the **Main account**.
   o Type a **Default Amount**. A default amount of 0.00 is assigned by the system for each detail account.

9. Click **Add template**.

Transfer Money to Multiple Accounts

1. Click **Transfers and Payments > Transfer money / Manage templates**.

2. Select the template you want to use for the transfer request and click **Continue**.

3. **Optional:** In the **Control** field, change the maximum dollar amount allowed for the transfer.

4. **Optional:** Change the **Description** of the transfer.

5. In the **Amount** field, type the transfer amount for each detail account. The **Variance amount** is the difference between the **Control amount** and the sum of the detail account amounts.

6. Click **Continue**.

7. Perform one of the following actions:
   o Click the **Submit for approval** link to submit the request into the approve/transmit queue.
   o Click **Approve** to approve the request.
   o Click **Transmit** to approve and transmit the request.

Stop Check Payments

Stop payment on a check you suspect is stolen or lost.

Note: Payments made using online bill payment cannot be stopped using this page.

1. Select **Account Services > Stop check payments**.

2. Select an **Account**.

3. If applicable, select or type an **Expiration date**.

4. **Optional:** Type a **Reason** for the stop payment request.

5. Click the **Stop a single check** option and fill in the following fields:
    o **Check number** (up to 10 digits)
    o **Date on check**
    o **Payee** (optional)
    o **Amount** (optional)

6. Click **Continue**.

7. Verify the information and then click **Submit request**.

    Note: If you receive an error message when attempting to place a stop payment, be aware that there are a variety of reasons why a stop placement might fail. These include, but are not limited to:

    - A stop has already been placed on the check.
    - The check has already been presented for payment.
    - There are conditions on the account which prohibit a stop from being placed.

Contact Us

1. Click **Administration > Contact us**.

2. Select the message recipient.

3. Enter the message subject.

4. **Optional:** Include an account number with your message by first selecting an Online Banking service and then the account.

5. **Optional:** Click **Browse** and select a file to attach to the message. The attached file cannot exceed 5 MB.

6. Type your message in the **Message** field.

7. Click **Send message**.

View Received Mail and Alerts

Mail messages and alerts are automatically deleted after 90 days.

1. Click **Administration > Mail and alerts**.

2. Click the **Subject** of the message or alert you want to view.

Account Alerts

The Manage Alerts page allows you to manage your account alert subscriptions and choose how you receive the alerts. Alerts are always sent to your online banking mailbox. To have alerts delivered to your primary or secondary e-mail address and/or mobile telephone number (if applicable); you must set up those delivery options on the Manage Contact Preferences page.

Note: Alert subscriptions that are mandatory cannot be deleted. Mandatory alert subscriptions always appear with a checkmark before the name instead of a check box and do not have a **Delete** link.

To access the Account Alerts page, do the following

1. Click **Administration > Manage alerts**.

2. Click the **Account Alerts** tab.

Add an Account Alert

To add an account alert, do the following:

1. Click **Administration > Manage alerts**.

2. Click the **Account Alerts** tab.

3. Select an account.

4. Click the **Add** link next to the alert subscription you want to add. The table row expands, showing the alert description and delivery options.

5. Enter alert criteria if applicable

6. Click the check box associated with each **Send To** option to which you want the alert sent. The **Send To** column does not appear if you do not have an e-mail or mobile telephone (if applicable) defined.

7. Click **Add alert**

Add or Delete Multiple Account Alerts

1. Click **Administration > Manage alerts**.

2. Click the **Account Alerts** tab.

3. Click the **Set Up Account Alerts** link.

4. Click the **Alert** arrow, select an alert, and then click **Go**.

5. Select the **Destinations** as appropriate.

6. Select or de-select the **Accounts** as appropriate.

7. Click **Save changes**.

Change an Account Alert

1. Select an account.

2. Click the **Change** link next to the alert subscription you want to modify.

3. Modify the alert criteria as needed.

4. Change the **Send To** options as appropriate. The **Send To** column does not appear if you do not have an e-mail or mobile telephone (if applicable) defined.

5. Click **Save alert**.

Delete an Account Alert

1. Select an account.

2. Click the **Delete link** next to the alert subscription you want to delete.