

# Online banking basics

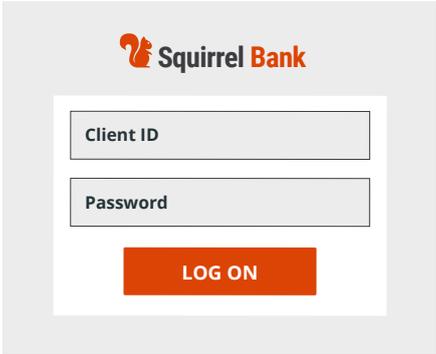
Practise some basic banking activities with Squirrel Bank.

Let's practise the basics of logging on, checking a transaction and a statement, seeing what messages we have received from our bank and getting help using Squirrel Bank. While Squirrel Bank will look a little different from your bank's secure online system, the steps for each activity will be similar.

## Logging on and off

The first thing you must do every time you are banking online is to log onto your bank's secure website. The last thing you must do is log off the website properly. Let's practise that now, and along the way check your bank balance:

1. Using the Be Connected *Online banking basics* course, find the **Logging on and off** practice activity. There, you'll see the log on screen.
2. Click in the **Client ID** box and type **564892P**. Remember, you will need to click in a box before you can type anything into it.
3. Type **LaMp48nuf** in the **Password** box.
4. Click the **Log on** button.
5. The next screen will show you a list of the Squirrel Bank accounts along with the balance of funds in each.
6. To log off properly, just click on the **Log off** button on the top right of the screen. Remember, it is important for the safety of your bank accounts that you log off properly from online banking, not just switch off your computer.



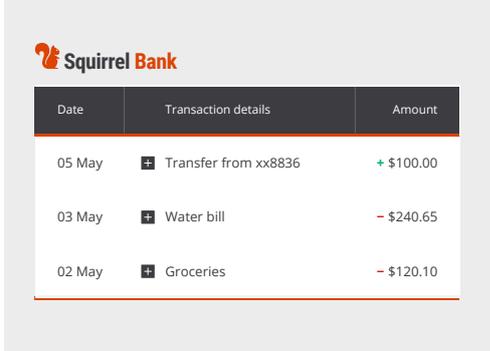
You need to log on securely each time you use online banking

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## Checking a transaction

Online banking gives you access to more information than just account balances. You can see every transaction in your accounts. Let's check out the transactions in the **Everyday Account**:

1. Using the Be Connected *Online banking basics* course, find the **Checking transactions** practice activity, then click on **My accounts** in the top left of the screen. A drop-down menu will appear.
2. Click on **Transactions** in the menu. A list of deposits and withdrawals for the **Everyday Account** will appear.
3. Click on the first transaction, **Transfer from xx8836**, to see more information.
4. When you are finished, click on the **Log off** button on the top right of the screen to sign out securely.



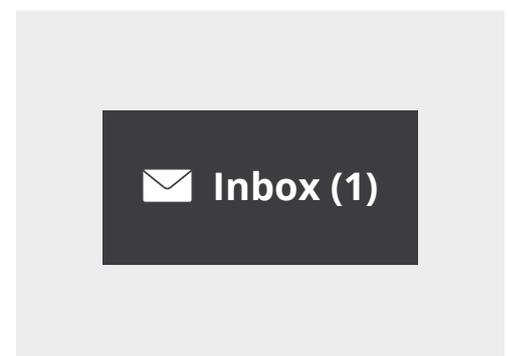
| Date   | Transaction details  | Amount     |
|--------|----------------------|------------|
| 05 May | Transfer from xx8836 | + \$100.00 |
| 03 May | Water bill           | - \$240.65 |
| 02 May | Groceries            | - \$120.10 |

Online banking shows deposits and withdrawals for each of your accounts

## Inbox and messages

Your bank can send you messages using its online banking system. Let's see if there are any there:

1. Using the Be Connected *Online banking basics* course, find the **Inbox and messages** practice activity, then find the **Inbox tab** near the top right. The tab is showing **(1)**, which means there is 1 new message. Click on the Inbox tab to see it.
2. A list of messages from your bank appears. The messages that you have not yet read are shown in bold type. Click on the first message, **Enjoy your reward**.
3. The message will appear on the screen. Read it if you like, then click the **Back to Inbox** button to return to the list of messages. You'll see that the message is no longer bold and that the Inbox tab shows **(0)**.
4. Now, log off securely using the **Log off** button.



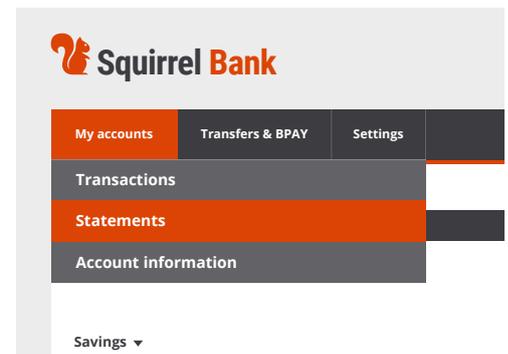
Messages from your bank appear in your online banking Inbox

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## Managing statements

You don't have to wait for your latest bank statement to come in the mail. You can log on to see it online, and download it to your computer to print out.

1. Using the Be Connected *Online banking basics* course, find the **Managing statements** practice activity, then click on **My accounts** in the top menu.
2. Click on **Statements** from the drop-down menu. You will see a list of monthly bank statements.
3. Find the **30 April statement** and click on the **Download** option.
4. Now, log off securely by clicking the **Log off** button.

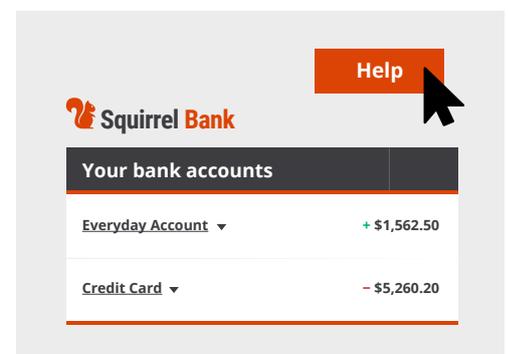


View statements for all your accounts, and download them to your computer

## Help and support

Your bank has extensive help features in case you run into any problems. Again, your own bank's website may look a little different to our practice Squirrel Bank, so you may need to look around the screen for the **Help** button.

1. Using the Be Connected *Online banking basics* course, find the **Getting help and support** practice activity, then click the **Help** button near the top right of the screen to see the options. You will see that there are a number of specific options, such as **Report a lost or stolen card**.
2. For now, click on **How to contact the bank**. A screen will appear showing all the different ways that Squirrel Bank can be contacted, including by phone and email.
3. Click on **Back to Help** to go back to main **Help and support** page.
4. Now, log off securely using the **Log off** button.



The Help button provides assistance with online banking