

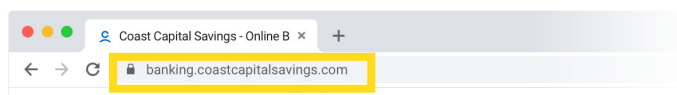
Coast Capital Digital Banking Overview: Desktop

Use this guide if you're accessing Coast Capital's digital banking on a computer.

Coast Capital's award winning digital banking is safe, secure and full of tools to help you manage your finances. We're bringing you some tips to help you learn to use commonly used features and get the most from our digital banking experience.

Access Digital Banking

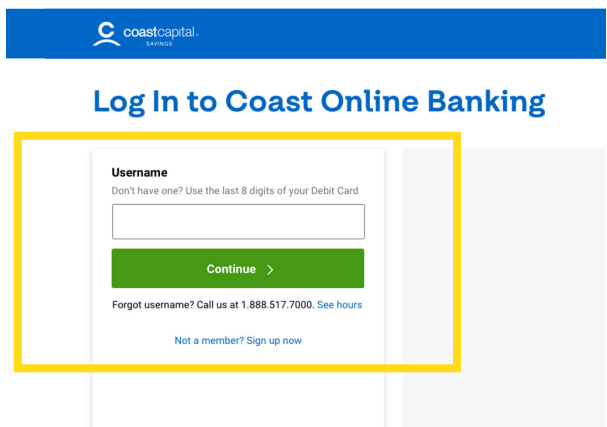
Open your internet browser and type **banking.coastcapitalsavings.com** into your browser bar.



Access Digital Banking

Log In

Enter your Username and Password in the fields. If you haven't set these yet, fill in the Username field with the last 8 digits of your debit card and use your 7 digit Personal Access Code as your password. You will then be prompted to set a Username and Password that adheres to our security requirements. Once they are set, you will use them to log in moving forward.



Enter your username here. If you don't have one yet, enter the last 8 digits of your debit card.

Accounts Screen Overview

The Accounts Screen is the first thing you see after you log in. It makes it easy to check your balances and perform popular transactions.

Menu

Overview of your Accounts

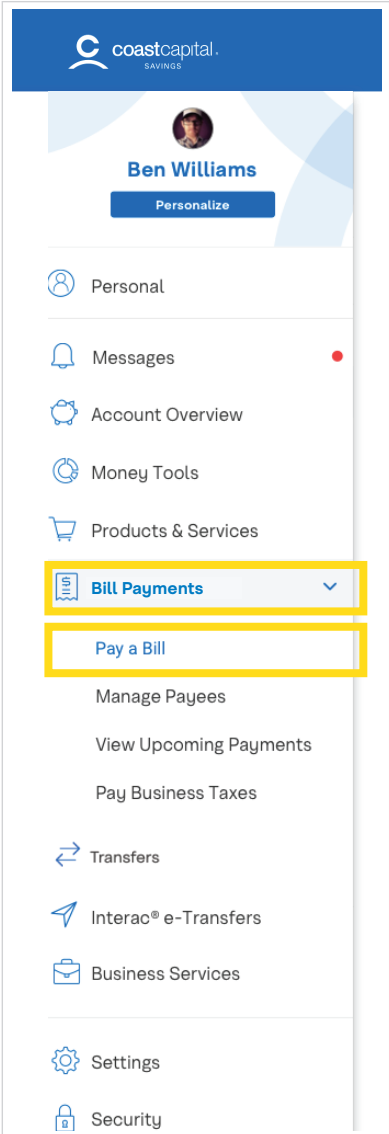
The screenshot displays the 'My Accounts' page in the Coast Capital digital banking interface. At the top, the user is identified as Ben Williams, with a 'Personalize' button. The navigation menu on the left includes options like Personal, Messages, Account Overview (selected), My Accounts, View Activity Timeline, View eStatements, Money Tools, Products & Services, Bill Payments, Transfers, Interac® e-Transfers, Business Services, Settings, Security, and Partner Logins. The main content area shows the user's last login and a list of accounts under two membership numbers. The first membership (12344552) includes Chequing Account, Demand account, Travel Credit Card, and Emergency Fund. The second membership (10122344) includes RSP Savings and RSP Term Deposit.

Membership	Account Name	Account Number	Balance
MEMBERSHIP 12344552	Chequing Account	123456789012 (123)	\$14,000.00
	Demand account	123456789012 (123)	-\$1,234.00
	Travel Credit Card	123456789012 (123)	\$30,201.00
	Emergency Fund	123456789012 (123)	\$5,948.00
MEMBERSHIP 10122344	RSP Savings	123456789012 (123)	\$14,567.00
	RSP Term Deposit	123456789012 (123)	\$2,345.00

Paying Bills

Paying your bills online is quick and easy with Coast Capital's digital banking. Here's how you do it.

Open the Pay Bill section



The screenshot shows the Coast Capital digital banking interface. At the top, there is a blue header with the Coast Capital logo and the text "coastcapital. SAVINGS". Below the header, there is a user profile section for "Ben Williams" with a "Personalize" button. The main navigation menu is displayed below, listing various services: Personal, Messages, Account Overview, Money Tools, Products & Services, Bill Payments, Pay a Bill, Manage Payees, View Upcoming Payments, Pay Business Taxes, Transfers, Interac® e-Transfers, Business Services, Settings, and Security. The "Bill Payments" and "Pay a Bill" items are highlighted with a yellow box. A blue circle with the number "1" and an arrow points to the "Bill Payments" item, and another blue circle with the number "2" and an arrow points to the "Pay a Bill" item.

Click on "Bill payments" **1**

2 Click on "Pay Bills"

Make your payment

Pay Bills

Data Confirmation Receipt

Have more than one bill to pay? Make things simple by adding all of your payments at the same time.

[Make payments](#) [Schedule recurring payments](#)

Pay from

MEMBERSHIP 1234567

<input type="radio"/> Demand account 123456789012 (123) \$12,062.12	<input type="radio"/> Chequing account 123456789012 (123) \$371.92	<input type="radio"/> Account for payments 123456789012 (123) -\$400.01	<input type="radio"/> Extra Spence 123456789012 (123) \$500.00
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Pay to

Payee name	Payee Account Number	Amount	Date
BC Hydro	123456789012	<input type="text" value="\$"/>	<input type="text" value=""/>
Telus Communications	123456789012	<input type="text" value="\$"/>	<input type="text" value=""/>
Coast VISA Desjardins	123456789012	<input type="text" value="\$"/>	<input type="text" value=""/>
Freedom Mobile	123456789012	<input type="text" value="\$"/>	<input type="text" value=""/>
Capital One Mastercard	123456789012	<input type="text" value="\$"/>	<input type="text" value=""/>

Total Amount \$ 0.00

Note: To ensure your payments are received by the vendor before their due dates please forward payment 2 to 3 business days in advance of the due date to allow for processing time.

1

Select the account you'd like to pay your bill from

2

Enter payment amount next to payee you wish to pay

3

Specify payment date

4

Click "Continue"

You will be prompted to review and confirm your bill payment. After confirming, you will get a confirmation receipt that you can email to yourself if you like.

View Transaction History

Select Account to Review

When you first log in, you'll already be on the My Accounts page. If you are elsewhere in digital banking you will need to navigate to it:

Click on "Accounts Overview" 1

Click on "My Accounts" 2

Click the account you want to review 3

The screenshot shows the Coast Capital digital banking interface. The top navigation bar includes the Coast Capital logo and the user's name, Ben Williams. The main content area is titled "My Accounts" and displays a list of accounts. The "Account Overview" menu item is highlighted with a yellow box, and the "My Accounts" menu item is also highlighted. The "Chequing Account" is highlighted with a yellow box, and the "RSP Savings" and "RSP Term Deposit" accounts are also highlighted. The "Chequing Account" is a Demand account, and the "RSP Savings" and "RSP Term Deposit" are RSP accounts. The "RSP Savings" account has a membership number of 10122344, and the "RSP Term Deposit" account has a membership number of 12344552.




Filter the Search

Last logged in Wed, Feb 7, 2018, 7:26 AM, PST via Online Banking

Account Details

My accounts

MEMBERSHIP 1234567


 Chequing account  123456789012 (123) \$371.92	Demand account 123456789012 (123) \$12,062.12	Account for payments 123456789012 (123) -\$400.01	Extra Spenc 123456789012 (123)  \$500.00
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MEMBERSHIP 1234567


Membership	1234567
Available balance	\$11,962.12
Hold amounts	\$100.00

[Show more details](#)

Transactions from **Feb-19-2018 to Mar-06-2018**



Transactions from Feb-19-2018  **To** Mar-06-2018  **Monthly filter** Select a month 

Statement filter All statements items 

2

Fill in search fields

1

To view more than the default 30 days, click "Search filters"

Print or Export Your Transactions

You may wish to print or export (save to your computer) your transactions, like a statement. To do this, just scroll to the bottom of your transaction list and click on “Print” or “Export”.

- Products & Services
- Bill Payments
- Transfers
- Interac® e-Transfers
- Business Services
- Settings
- Security
- Partner Logins

Hold amounts \$100.00

[Show more details](#)

Transactions from **Feb-19-2018 to Mar-06-2018** Search filters

Date	Description	Amount	Balance
Mar-06-2018	TRANSFER TO RRSP SAVINGS ACCOUNTS - large description with two lines	-\$100.00	\$12,062.12
Mar-06-2018	Bill payment	-\$20.00	\$12,162.12
Mar-06-2018	Bill payment	-\$50.00	\$12,182.12
Mar-06-2018	cheque deposit	\$100.00	\$12,232.12
Mar-05-2018	TRANSFER TO RRSP SAVINGS ACCOUNTS - large description with two lines	-\$100.00	\$12,132.12
Mar-05-2018	Bill payment	-\$20.00	\$12,232.12
Mar-05-2018	Bill payment	-\$50.00	\$12,252.12
Mar-05-2018	cheque deposit	\$100.00	\$12,302.12
Mar-05-2018	TRANSFER TO RRSP SAVINGS ACCOUNTS - large description with two lines	-\$100.00	\$12,202.12
Mar-05-2018	Bill payment	-\$20.00	\$12,302.12
Mar-05-2018	Bill payment	-\$50.00	\$12,322.12
Mar-05-2018	cheque deposit	\$100.00	\$12,372.12

[Print](#) [Export](#)



Tip: If you're exporting to your computer, you will be asked to pick a file type to save it as. We suggest saving it as a PDF for easy viewing.

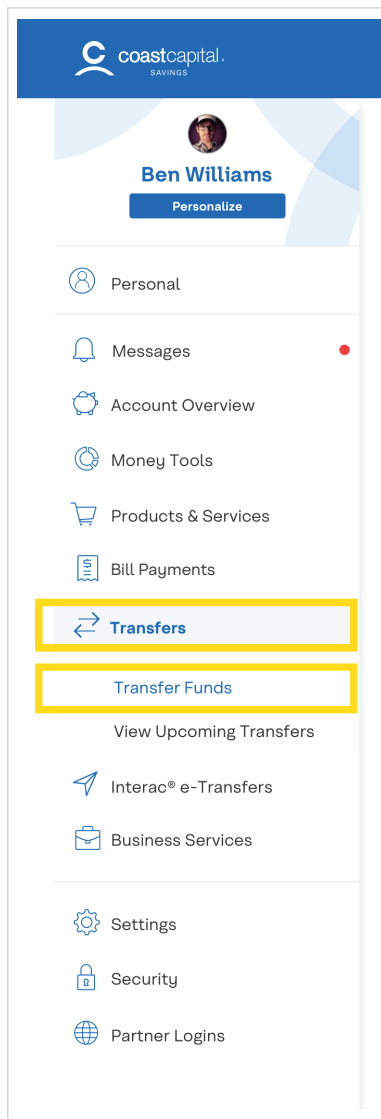
Transfer Between Your Accounts

This is how you transfer between accounts in the same membership.

Open the Transfer section of the app

Click on “Transfer”

1



2

Click on “Transfer Funds”

Send the transfer

The screenshot shows the 'Transfer Funds' page with a progress indicator at the top showing 'Data' as the active step. The page is divided into several sections: 'My accounts' with four account cards (Chequing, Demand, Account for payments, Extra Spending), 'Transfer to' with radio buttons for 'My own accounts' and 'Another Coast Capital Savings member', an 'Amount' field set to '\$ 100.00', 'Schedule transfer' with radio buttons for 'Immediate transfer', 'Scheduled transfer', and 'Recurring transfer', and a 'Memo' field. At the bottom are 'Cancel' and 'Continue >' buttons. Five blue callout boxes with numbers 1-5 and arrows point to specific elements: 1 points to the Chequing account card, 2 points to the 'Select a beneficiary account' dropdown, 3 points to the amount field, 4 points to the 'Immediate transfer' radio button, and 5 points to the 'Continue >' button.

1 Select the account you want to transfer from

2 Select the account you want to transfer to

3 Specify transfer amount

4 Optional: Update transfer schedule and add a memo

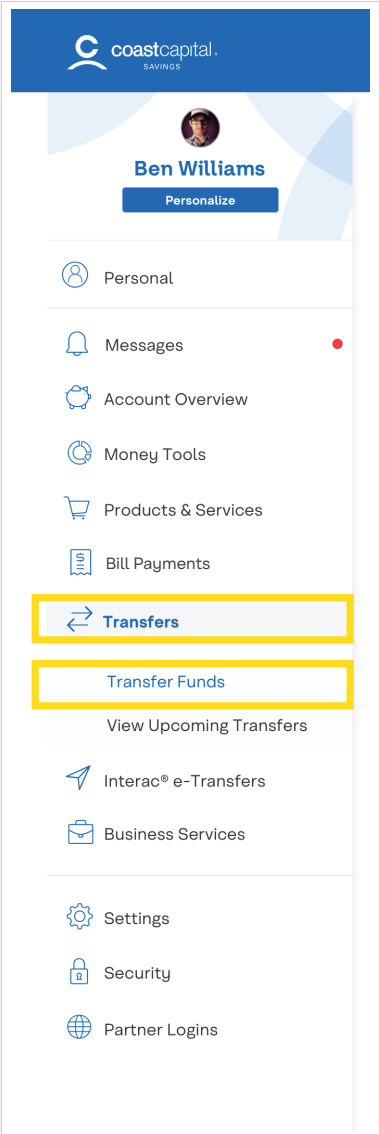
5 When you're ready, click "Continue"

You will be prompted to review and confirm your transfer. After confirming, you will get a confirmation receipt that you can email to yourself if you like.

Send a Transfer to Another Member

To transfer to another Coast Capital member, you will need to have their membership number ready.

Open the Transfer section of the app



The screenshot shows the Coast Capital app interface for user Ben Williams. The navigation menu includes: Personal, Messages, Account Overview, Money Tools, Products & Services, Bill Payments, **Transfers**, Transfer Funds, View Upcoming Transfers, Interac® e-Transfers, Business Services, Settings, Security, and Partner Logins. The 'Transfers' and 'Transfer Funds' items are highlighted with yellow boxes. A blue circle with the number '1' and an arrow points to the 'Transfers' item, with the text 'Click on "Transfer"'. A second blue circle with the number '2' and an arrow points to the 'Transfer Funds' item, with the text 'Click on "Transfer Funds"'. The app header shows the Coast Capital logo and the user's name 'Ben Williams' with a 'Personalize' button.

Send the transfer

The screenshot shows the 'Transfer Funds' form with the following sections and callouts:

- Transfer from:** A horizontal list of four accounts. Callout 1 points to the 'Chequing account' with a balance of \$371.92.
- Transfer to:** Radio buttons for 'My own accounts' and 'Another Coast Capital Savings member'. Callout 2 points to the 'Another Coast Capital Savings member' option, which has a text input field containing '12345678'.
- Amount:** A text input field containing '\$ 100.00'. Callout 3 points to this field.
- Schedule transfer:** Radio buttons for 'Immediate transfer' (selected), 'Scheduled transfer', and 'Recurring transfer'. Callout 4 points to this section.
- Memo:** A text input field for adding a memo.
- Buttons:** 'Cancel' and 'Continue >' buttons. Callout 5 points to the 'Continue >' button.

At the top right of the form, there is a progress indicator with three steps: 'Data' (selected), 'Confirmation', and 'Receipt'.

1

Select the account you want to transfer from

2

Click to change the transfer to **“Another Coast Capital member”**. A new field will show where you will enter their Coast Capital membership number.

3

Specify transfer amount

4

Optional: Update transfer schedule and add a memo

5

When you’re ready, click **“Continue”**

You will be prompted to review and confirm your transfer. After confirming, you will get a confirmation receipt that you can email to yourself if you like.

Quick Tips for Digital Banking Success

You've got questions, we've got answers. Here are answers to some common questions we've received.

What to do if you forget your password

- One-time security codes are part of our enhanced security and help us verify that it's you performing a transaction.
- It's a 7 or 8 digit number that we will send you through a text message to your mobile phone or through email when you perform certain types of transactions. You will only need to use the number once, so don't worry about remembering it.
- When a one-time security code is required, you will see a screen that looks like this:

The screenshot shows the 'One Time Security Code Required' screen in the Coast Capital mobile app. At the top, the Coast Capital logo is visible. Below it, the title 'One Time Security Code Required' is displayed. To the right of the title is a progress bar with three steps: 'Data' (completed), 'Confirmation' (completed), and 'Receipt' (pending). A warning icon (exclamation mark in a circle) is centered on the screen, with the text 'One more step. We just want to make sure it's really you' below it. Underneath, the 'Mobile Phone' option is selected with a radio button. Below this, the instruction 'Enter the code we've sent to your phone' is followed by a text input field. Below the input field, a message states: 'An SMS has been sent to your phone +*(***)***-5285 with a one-time security code to validate the transaction. Please enter the code in the box above.' A link is provided: 'If you have not received the code within 1 minute, [click here to resend the one-time security code](#)'. The 'Email' option is unselected. At the bottom left is a 'BACK' button with a left arrow. At the bottom center are two buttons: 'Cancel' and 'Confirm >'.

Depending on how you enrolled in digital banking, you may receive this code by text to your mobile phone or by email. Check your mobile phone for a text message from us. If you received it by email, it's best to open a new tab so you don't close your online banking session. We'll walk you through it.

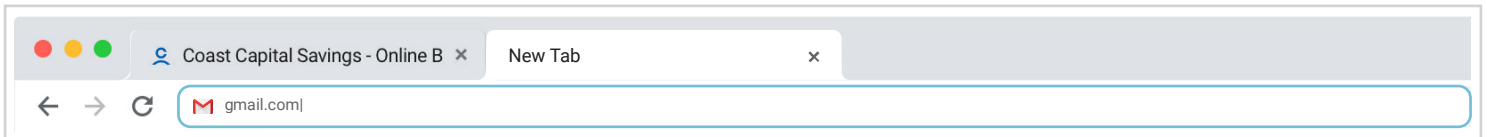
Quick Tips for Digital Banking Success

Opening a new tab

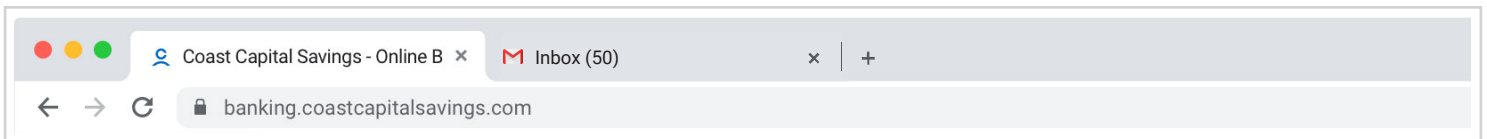
If you're using Google Chrome as your internet browser, click on the (+) icon to open a new tab. If you're not using Chrome, look for something similar.



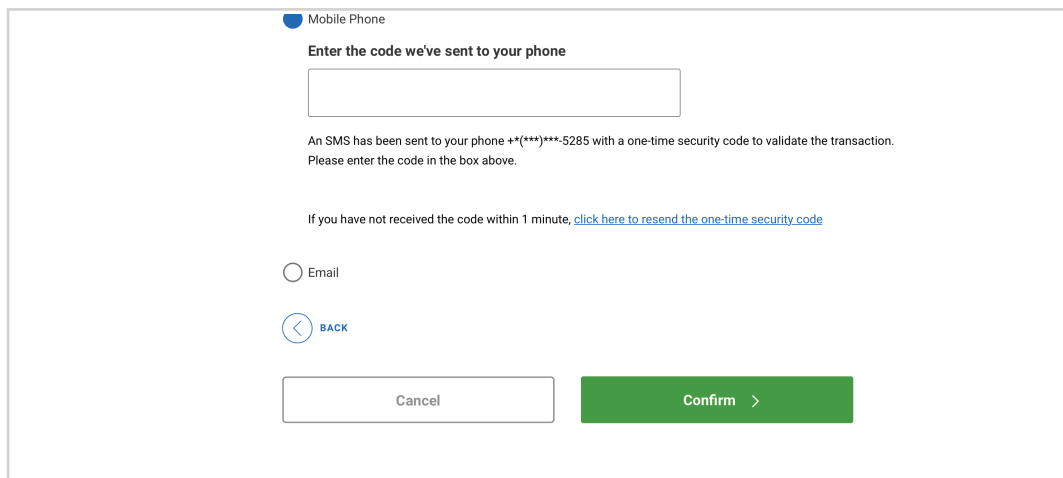
Once a new tab is open, visit your email provider from the new tab:



Open the email from us to retrieve the code, then click back into online banking by clicking on the Coast Capital tab.



Click on **“Email”**, enter the code we sent you and click **“Confirm”**

A screenshot of a mobile phone security code entry screen. The screen is titled 'Mobile Phone' and has a sub-header 'Enter the code we've sent to your phone'. Below this is a text input field. A message states: 'An SMS has been sent to your phone +*(***)***-5285 with a one-time security code to validate the transaction. Please enter the code in the box above.' Below the message is a link: 'If you have not received the code within 1 minute, [click here to resend the one-time security code](#)'. There are two radio buttons: 'Email' (selected) and 'Mobile Phone'. At the bottom, there are three buttons: 'Cancel', 'Confirm >', and a 'BACK' button with a left arrow.

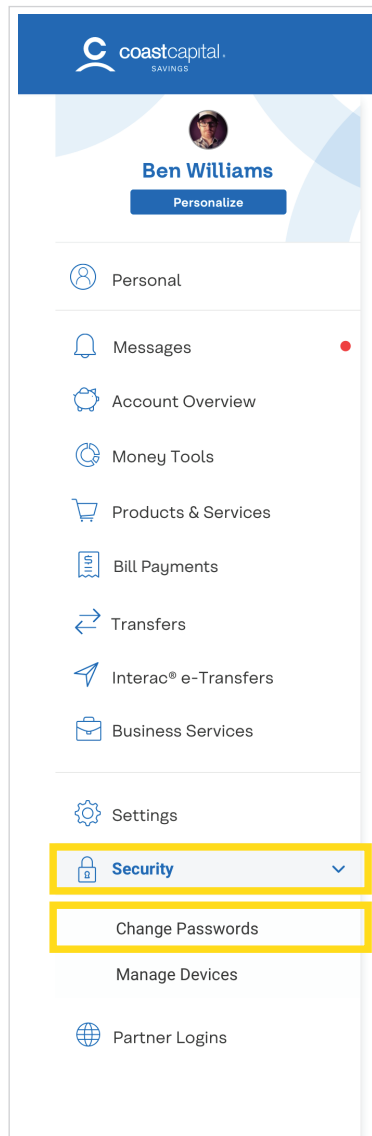
Quick Tips for Digital Banking Success

How to change your password

Open the Security section

Click on “Security”

1



2

Click on “Change Passwords”

Quick Tips for Digital Banking Success


Create your new password

The screenshot shows a 'Change Password' form with the following elements:

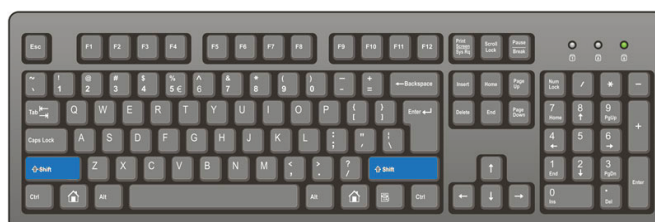
- 1** Points to the 'Old Password' input field.
- 2** Points to the 'New Password' input field.
- 3** Points to the 'Confirm Password' input field.
- 4** Points to the green 'Confirm >' button.

Additional form details include a progress indicator at the top right (Data: ●, Confirmat: ○), a 'Password strength: Weak' indicator, and three requirements marked with red 'X' icons: '10 characters', '1 uppercase letter', and '1 number or symbol'. At the bottom left is a 'Cancel' button.

- Passwords need to be a minimum of 10 characters and contain one uppercase letter and one special character (!, ?, \$, etc.)

 **Tip:** If you didn't receive the email, make sure to check your junk folder.

- To type an uppercase letter through the app, press and hold the Shift key on the keyboard:




Quick Tips for Digital Banking Success


What to do if you forget your password

- If you enter your password incorrectly three times your membership will be locked
- You can click “**Forgot Password**” to access our self-serve reset feature to set a new password. We can also help you reset it in a branch or through our Contact Centre.

www.coastcapitalsavings.com SWITCH TO DCU LOGIN FLOW Contact Us

 Log Out

Log In to Coast Online Banking



Username
Don't have one? Use the last 8 digits of your Debit Card

[Log in with a different account](#)





Password

[Forgot Password?](#)


Continue

[Not a member? Sign up now](#)

Partner Logins

Visa Desjardins Qtrade Investor Worldsource View Business Banking

 **Your Security**
Knowledge is the best first-line of defence to protect against cyber-fraud.
[Learn more](#) about our security and how you can protect yourself.
If you feel you're a victim of fraud, call us immediately at **1.888.517.7000**.

For more help with digital banking, visit [coastcapitalsavings.com/digitalsupport](https://www.coastcapitalsavings.com/digitalsupport) or contact us by phone at **1.888.517.7000**. We're here to help.