Commerce Bank Website

User Guide

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Introduction

Online banking can be a confusing and slow process. Too many unused features can make your experience feel like navigating a maze. This Commerce Bank online banking platform aims to make this process straightforward.
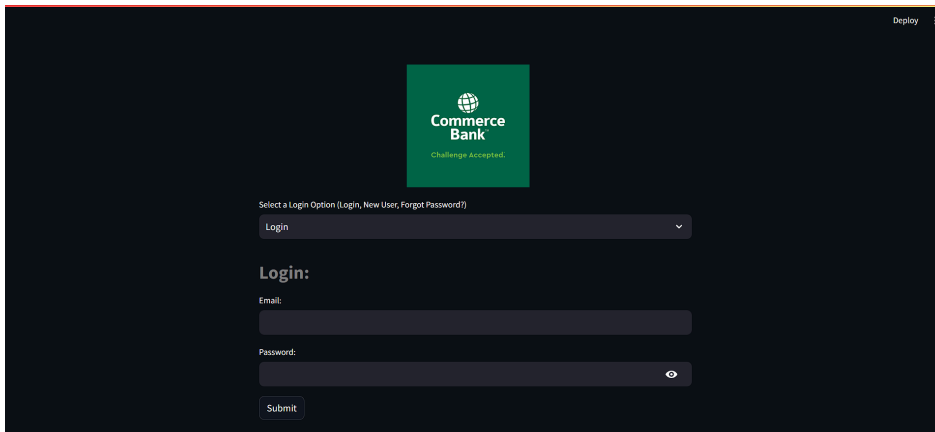
Not only does this platform make accessing or creating your account a simple process, but it also provides a number of helpful features all available after you login.

- Add transactions
  - Add them based on a wide number of categories
  - Have them automatically timestamped
  - Add transactions based on amount
- View transactions
  - View all transactions entered
  - Organize by category
  - Organize by amount
  - Organize by date
  - View useful statistics
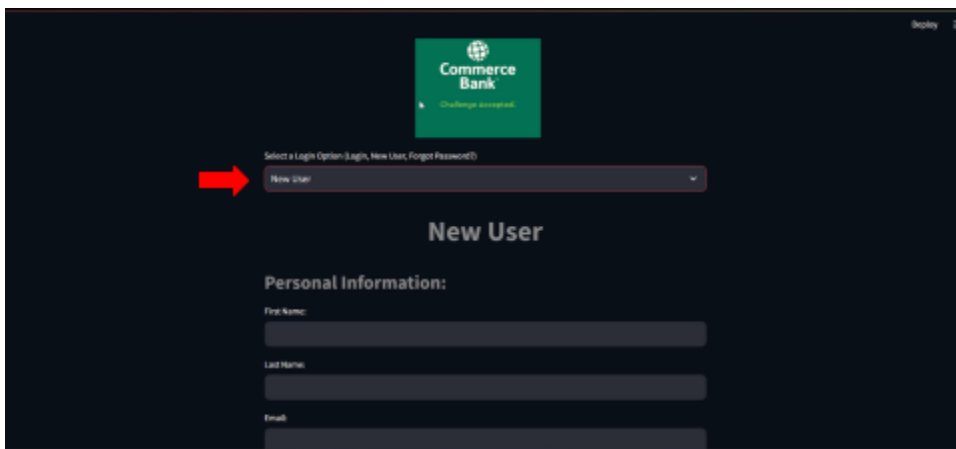- Loan Calculator
  - Find useful loan information

Getting Started
Create an Account

To get started, go to the provided URL. You will land at the default page:


Navigate to the dropdown menu below the logo and select it. The dropdown menu will appear and choose "New User" if applicable from the list of options.

Fill out all information and click the submit button at the bottom. If successful, a message will appear. If unsuccessful, the user will be prompted to correct any mistakes.

Login to Existing Account

After creating an account or if one exists, click the navigation bar below the logo again and select login.
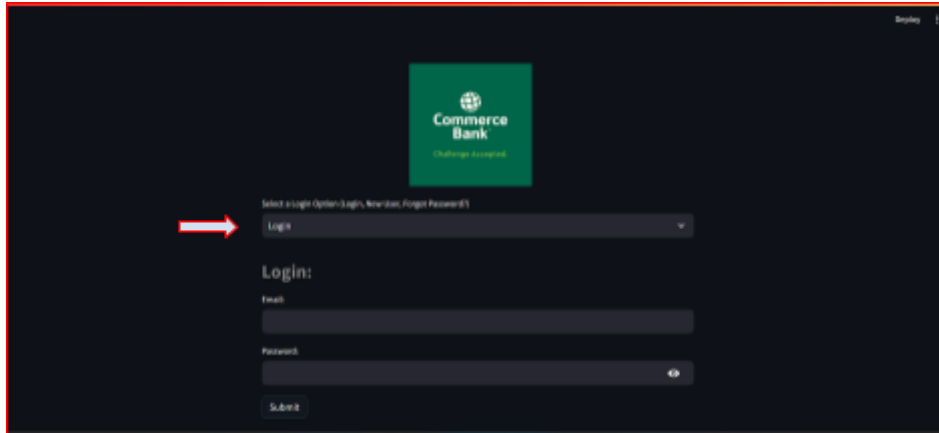
Fill out the associated email and password then select submit. You will then be redirected to the homepage if successful. If unsuccessful, the system will prompt you to fix the error in either email and/or password.

For help resetting your password see:
Forgot Password
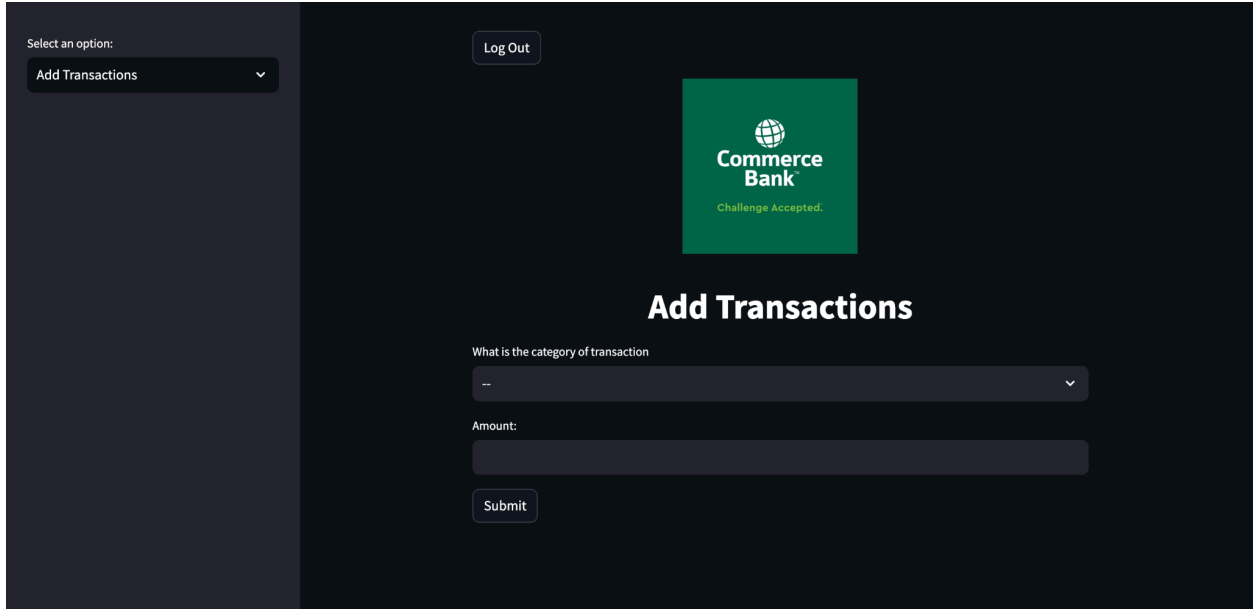
Navigating the Website
User Settings
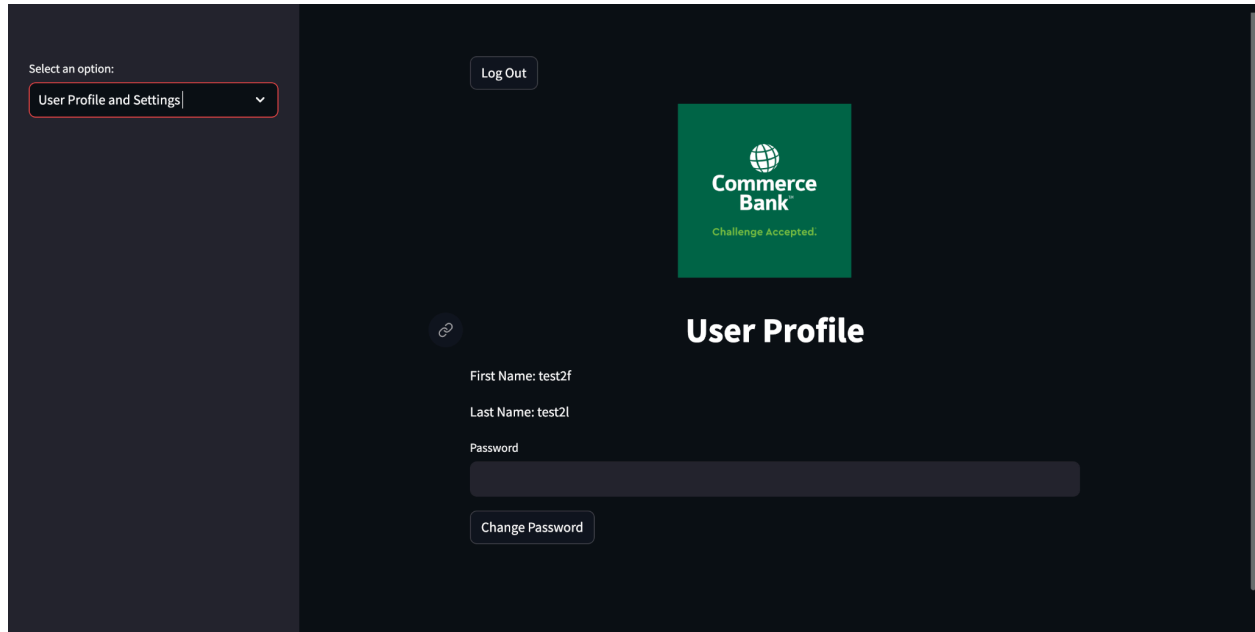
To change your password, once logged in and authenticated the user can navigate to this tab. Enter your *new* password into the 'password' field and click the button. The user will then be shown a confirmation message.
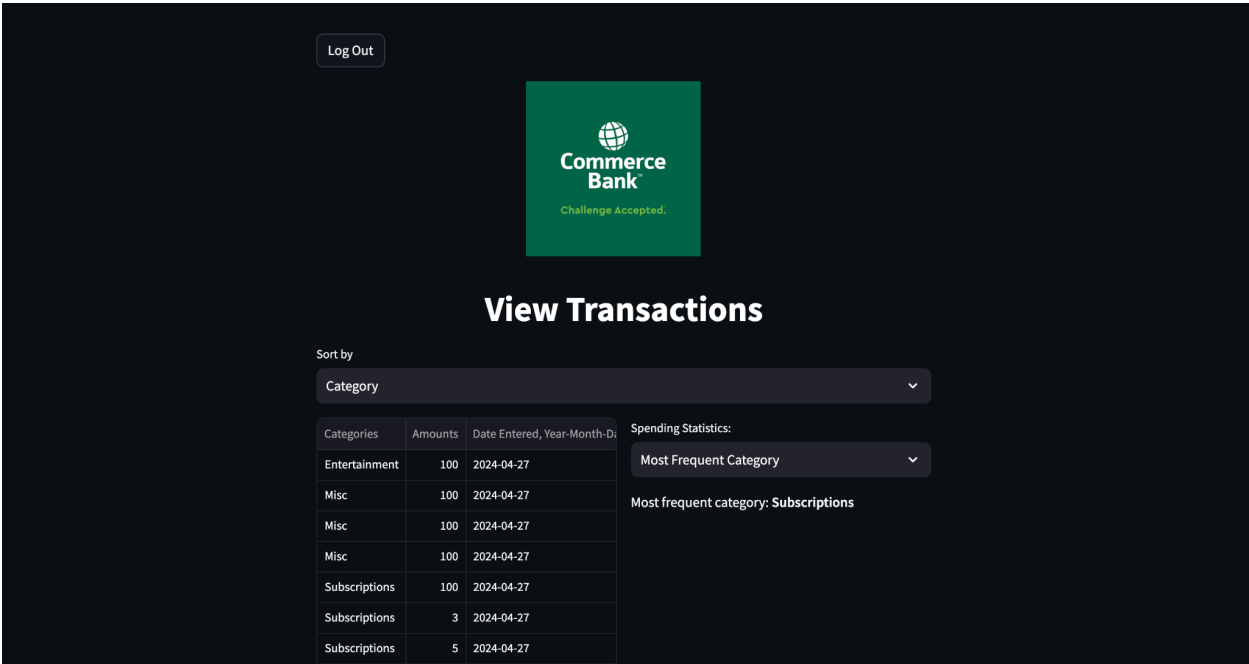
Navigating the Website
Adding Transactions

1. Select the category of transactions from the list of categories in the first dropdown bar.
2. Enter the amount of the transaction to be recorded.
3. Submit

Viewing Transactions

Transactions previously inputted can be viewed in this section, along with their associated information. Clicking the sort by option and choosing a column (category, amounts, date) will then sort the below table by chosen column.

Spending statistics dropdown menu will give you further statistics based on your transactions. The user can view most frequent category, most expensive category, or total over the course of the month.

Loan Calculator
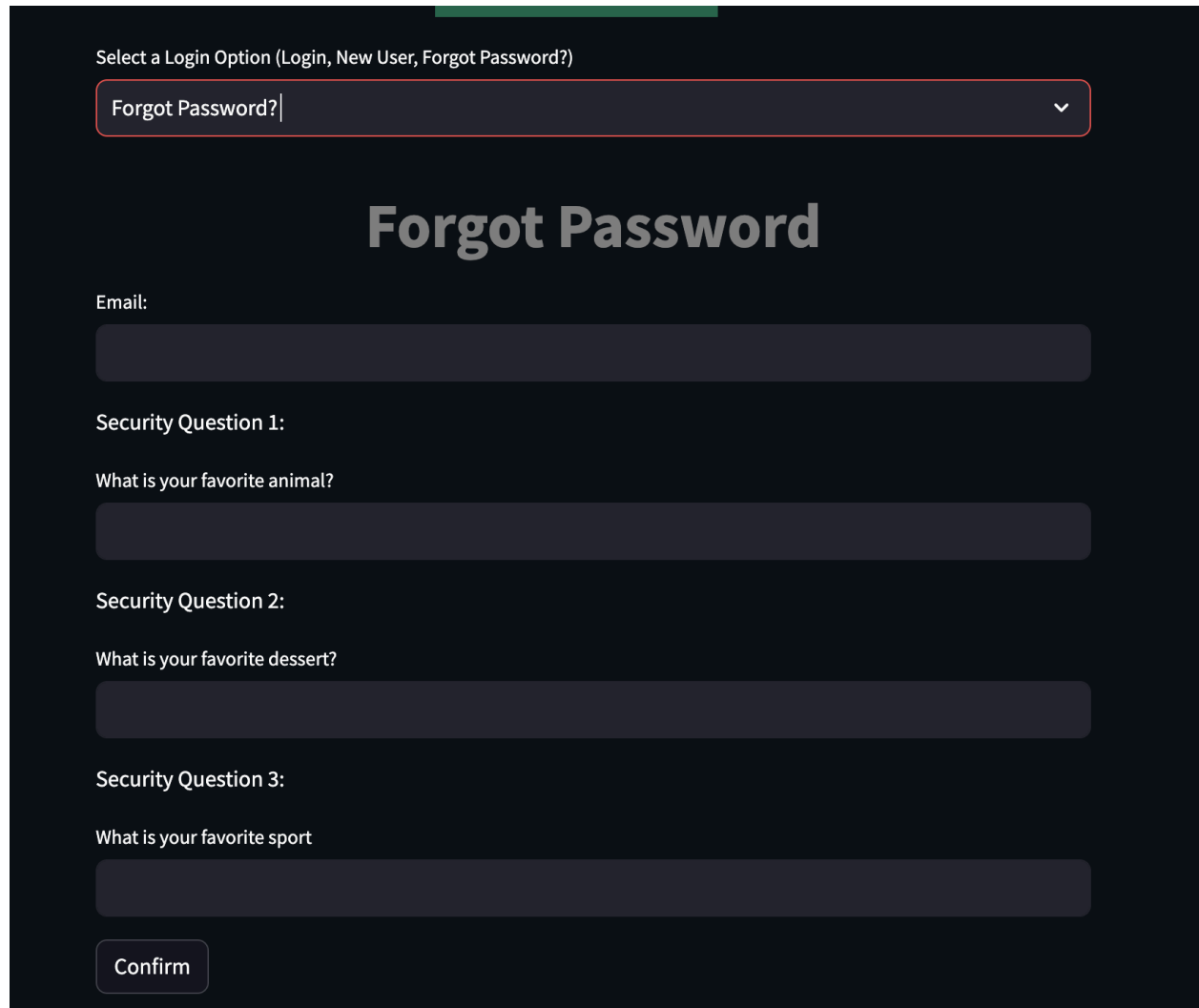
The final feature of the website is the loan calculator. The user can input their loan information and get useful statistics back that will be represented by a generated pie chart. Simply enter the user's valid values into the fields.

Forgot Password

If the user has forgotten their password they must reset it. They will input the associated email and correctly answered the security questions from signup – from there they will be able to reset their password.

Resetting the Password

See page 4.