# Start Session

Type in ID Number and email address

If successful this will create a user to start for with the session. See below:

A screenshot of a social media post

Description automatically generated

When user is created for session

A screenshot of a social media post

Description automatically generated

You will see now if you click on the View Accounts button that no accounts are returned

A screenshot of a social media post

Description automatically generated

# Client Bank Login

This is because the client bank login has not occurred yet. To continue click on the Client Bank Login button. This will bring up a web page:

A screenshot of a cell phone

Description automatically generated

Click on proceed to continue to the Bank Search page. The starting page looks like this:

A screenshot of a computer

Description automatically generated

Click in the search bar below and type in your bank name as below:

A screenshot of a computer

Description automatically generated

When you see your bank name select it and it will take you to the login screen as seen below:

A screenshot of a computer

Description automatically generated

Log in using your credentials and you will see a list of your accounts as illustrated below:

A screenshot of a social media post

Description automatically generated

You can remove the accounts you do not want to use or link another account. You can also link more accounts by clicking on the Client Bank Login in the demo application.

# View Accounts

Now you can go banc to the demo application and click on View Accounts again. Now those accounts will be listed:

A screenshot of a social media post

Description automatically generated

# View Transactions

Now select the account you would like to view transactions for and click on view transactions. The view transactions screen will show and will by default display 90 day transactions. You can now adjust this with the data boxes as shown below and click on refresh transactions:

A screenshot of a computer

Description automatically generated