



TRAILWEST BANK

Digital Banking

USER GUIDE

Account Services **Account Overview** [Home](#) [Message](#) [Log Off](#) [Pin more widgets...](#)

Commercial Welcome to TrailWest Digital Banking

Bank Services Jacquelyn Wetherbee

Security

Calculators

Checking and Savings Accounts		Current	Available	
Regular Checking 7769796		\$87,500.00	\$87,500.00	
Regular Checking 4902334		\$37,627.61	\$37,227.83	
Savings 33242808		\$47,903.65	\$47,667.47	
Savings 2583118		\$2,532.72	\$2,447.98	

Time Deposit Accounts		Current	Available	
Time Deposit 80618385		\$15,135.27	\$15,064.11	

Loan and Mortgage Accounts		Current	Available	
Installment Loan 9837839739		\$30,218.21	\$30,171.91	

Statements
Please go to this widget's options to choose a primary account.
[View all statements.](#)

Needs Confirmation
There are no outstanding transactions needing confirmation.

Messages
You have

Member FDIC

9:39

**TRAILWEST
BANK**

Username

Password [Show](#)

Quick Balance [Save Username](#)

Privacy Policy [Enroll](#) [Login](#)

[Fingerprint / Face ID](#)

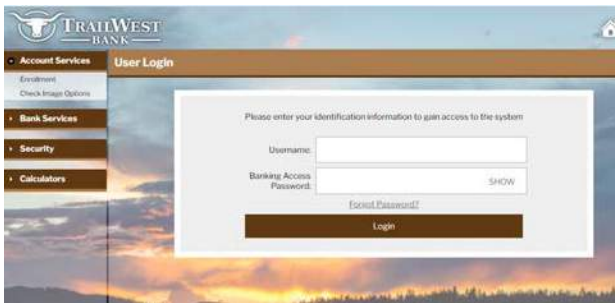
Member FDIC

Online Banking

Online Banking Log In

Browse to www.TrailWest.Bank and click the "Banking Login" button at the top left. Enter your username and password, then click "Login." For the best user experience, utilize the current version of the following browsers: Chrome, Edge, Firefox, or Safari.

*If this is your first time logging in to Online Banking, enter the temporary password provided by email, and follow the prompts to change your password.



The next prompt will be for multi-factor authentication. A PIN code will be sent to you via email and SMS text message. Enter the code and select "Submit."

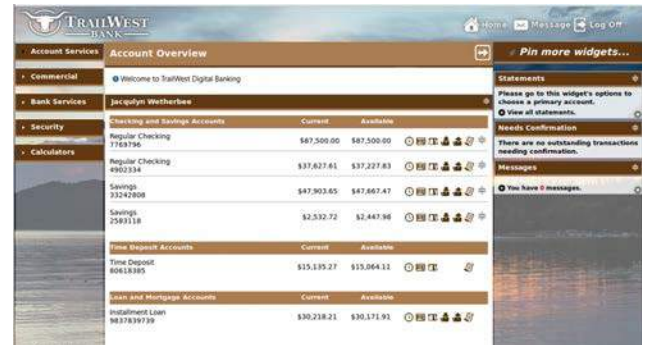
Manage Account Preferences

To update account preferences, click "Preferences" in the left hand menu under "Account Services." "General Preferences" apply to all accounts, but preferences can be customized by individual account. Apply nicknames, identify depth of transaction history, categories, assign register colors and more.










Access Account Info

Upon log in, users will arrive at the "Account Overview" dashboard.



There are several shortcut icons to the right of the account balance. Hover over the icon to see the functionality. From left to right:

-  Account History
-  Account Summary
-  Pending Items
-  Quick Transfer To
-  Quick Transfer From
-  View Statements

Click the "arrow"  icon to the right of "Account Overview" to expand custom shortcuts to: Alerts, Messages, Statements, and more!

Alerts

From the "Account Services" menu, select "Alerts." Update alert contact information, set security alerts, view alert history and customize account alerts.



Online Banking

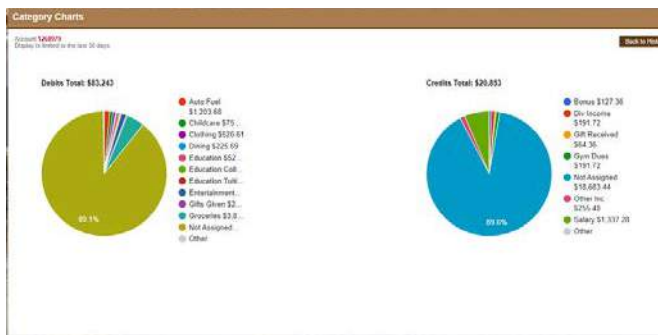
Transaction History

From the "Account Overview" dashboard, click on the account number you wish to view or simply click the "clock" 🕒 icon to access account history.

Posted	Item	Code	Description
06/14/2022	200001	Memo Post - Debit	POS MEMO HONIGDEVILLE MALL MISSOULA MT (Memo Post)
06/14/2022	200001	Memo Post - Debit	POS MEMO SCHEELS MISSOULA MT (Memo Post)
06/14/2022	200001	Memo Post - Debit	POS MEMO SQ COPPER MOUNTAIN CO Missoula MT (Memo Post)
06/14/2022	200001	Memo Post - Debit	POS MEMO VENMO NEW YORK NY (Memo Post)
06/14/2022	200001	Memo Post - Debit	Purchase HONIGDEVILLE MALL MISSOULA MT (Memo Post)
06/14/2022	200001	Memo Post - Debit	Purchase SQ COPPER MOUNTAIN CO Missoula MT (Memo Post)
06/13/2022	581	POS - Signature Purchase - CA	POS purchase on 06/12/22 at HOLIDAY STATIONS 0283 MISSOULA MT
06/13/2022	581	POS - Signature Purchase - CA	POS purchase on 06/11/22 at EASTERSEALS GOODWILL MISSOULA MT
06/13/2022	581	POS - Signature Purchase - CA	POS purchase on 06/12/22 at FUZZY WINGS CANNY FACT MISSOULA MT
06/13/2022	591	POS - Pin Purchase from Cr.	POS purchase on 06/11/22 at WINCO FOOD 2530 S River Missoula MT
06/13/2022	958	EFT transfer credit	Internet transfer from checking ****9090 Awp with gas
06/10/2022	151	Regular Deposit	

From the "Account History" screen, you can:

- Expand your history by clicking 30+ more days
- Click "Advanced" to expand your search options. Enter date range, search by amount, check or account range, report by category, tax-related documents and more.
- Click "Charts" if tracking categories for budgeting.
- Click "Download" to export to CSV or Quicken.
- Utilize "Search" to quickly locate a transaction.



Paperless Statements

Click the "Statements" 📄 icon from the "Account Overview" dashboard to enroll in Paperless Statements for each account or to view statements once enrolled.



Transfer Funds

Click the "Quick Transfer" 🏠 🏠 icons from the "Account Overview" dashboard to transfer funds between accounts or make loan payments.

Transfer Funds

Account Funds Transfer View History View Scheduled Needing Confirmation

From Account: xxx 9090 - Primary Checking (\$1,666.55)

To Account: Select account...

Transfer Amount: [Redacted]

Description (Optional):

Transfer Date: 06/03/2022 📅

Transfer Frequency: Single

Continue

Order Checks

From the "Account Services" menu, select "Check Design Options" to view the check options available. Select "Check Order Form" to place an order.

Order Checks

Check Order View History Needing Confirmation

Account Number: xxx 663 - Liquid Gold

Starting Number: 1001

Same As Previous Order: No

Quantity: 1 Box

Delivery Method: Pick up at Branch

Design: Standard Red Granite

Style: Singles

Deposit Slips: None

Continue

Online Banking

Bill Pay

From the "Account Services" menu, select "Bill Pay." Easily create new payees, manage bill payments, schedule recurring payments, and view payment history. Features include Ebills and Picture Pay.

The screenshot shows the "Bill Pay" section of an online banking interface. At the top, there are search and navigation options. Below, a list of payees is displayed, each with a logo, name, account number, and payment details. The payees listed are BEST BUY, COMCAST, DILLARDS, and DIRECTV. Each entry includes the account number, the amount to be paid, the due date, and the next payment date. There are also options to "Add Payee", "Recent", and "eBilling" for each payee.

Select "Pay A Person" to transfer funds to someone directly.

The screenshot shows the "Pay A Person" interface. At the top, there are tabs for "Send Money" and "Recipients". The "Amount to Send" is currently set to \$0.00. Below this, there is a section for "To whom do you want to send money?" with a dropdown menu showing "Text" and a green checkmark. There is also a note to "Take money from Regular Checking - *10796" and an option to "Send a message with your payment (Optional)". A "Done" button is at the bottom. A pink button labeled "Continue To The Next Step" is also visible.



Change Address

From the "Account Services" menu, select "Change Address" to update your mailing address or phone number information with the bank.

The screenshot shows the "Change Address" form. At the top, there are tabs for "Change Address", "View History", and "Needing Confirmation". The form fields include: "Address Change For:" (MT Medical Savings - xxx 936), "Name:" (TWB Customer), "Address:" (124 Main St), "City, State, ZIP Code:" (Lolo, MT 59847), "Home Phone:" ((408) 555-5899), "Business Phone:" ((408) 555-2266), and "Cell Phone:" ((408) 555-3845). A "Continue" button is at the bottom.

Forgot Password

From the login screen, click "Forgot Password."

The screenshot shows the login screen. At the top, it says "Please enter your identification information to gain access to the system". There are fields for "Username:" (twbcustomer) and "Banking Access Password:". A "SHOW" button is next to the password field. A "Forgot Password" link is circled in red. At the bottom, there is a "Login" button.

Enter your Username and click "Submit".

The screenshot shows the "Forgot Password" form. At the top, it says "Enter your username in the field below so that we may look up your information." There is a "Username:" field and a "Submit" button.

Follow the prompts to reset your password and multi-factor authentication.

Mobile Banking

Mobile Banking Log In

Browse to the Apple or Google Play store to search for the TrailWest Bank App and download. 


Enter your username and password and press "Submit."

*If this is your first time logging in to Mobile Banking, enter the temporary password provided by email, and follow the prompts to change your password.

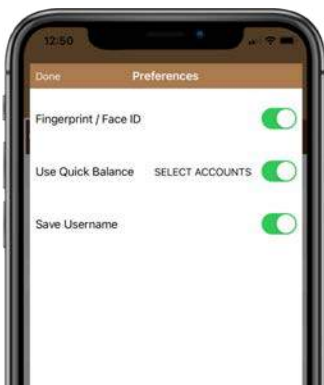


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
Manage Account Preferences













Upon the initial login, click the "person"  icon in the upper right corner and click on "Preferences." Toggle the appropriate button to enable the following features:

- Fingerprint/Facial Recognition
- Quick Balance
- Save Username



Mobile Banking Features

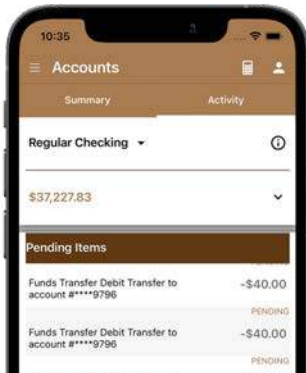
*Access all mobile banking features by clicking the "menu"  icon in the upper left corner:

-  Accounts - View the Account Activity section for details on Account Summary, Transactions, and Check Images. Quickly initiate transfers, mobile deposits or view statements.
-  Transfers - Schedule, confirm or view completed account transfers.
-  Statements - Select the account and statement date to view a PDF statement file.
-  Bill Pay - Create new payees, manage bill payments, schedule recurring payments and view payment history.
-  Pay A Person - Use your device to send money to anyone.
-  Deposit Check (Mobile Deposit)-Deposit checks anywhere and anytime.
-  Manage Cards - Set transaction alerts and prevent fraud by blocking your card when not in use.
-  Contacts - Need assistance and not sure who to call? View this section for quick contacts.
-  Locations - Link to our branch & ATM locations.
-  Website - Enjoy quick access to our website for more information.
-  Messages-Send and receive messages with the bank.
-  Privacy Policy-Quick access to the banks web & app privacy policy

Mobile Banking

Account Activity

Upon login, a list of accounts will display with the account balance. Tap any account to view details:



- **Account Information Summary**

To the right of the account name, press the "information" ⓘ icon to view the account number, routing number, current and available balances, last statement and deposit date, or current interest accrued.

- **View Transactions, Images & Account Balances**

Notice as you scroll, a daily account balance will display. To view a check image, click on the "check number" and swipe left to view the rear image.

- **Account Transfers**

After selecting an account, press the "arrow" ▼ icon to the right of the account balance for shortcut options. Tap the "Transfer To" 🏠 or "Transfer From" 🏠 icons.

- **Statements**

After selecting an account, press the "arrow" ▼ icon to the right of the account balance for shortcut options. Tap the "Statements" 📄 icon and select the statement date.

- **Mobile Deposit**

After selecting an account, press the "arrow" ▼ icon to the right of the account balance for shortcut options. Tap the "Deposit" 📄 icon to make a check deposit.

Mobile Deposit

Click the menu ☰ icon in the upper left corner and select "Deposit Check." Then select "Start a Deposit."

Select the Account Number to deposit into, enter the check amount, type an optional memo and press "Next."



Ensure the check is properly endorsed to meet the set requirements (Signature, For Mobile Deposit Only, TrailWest Bank) and press "Next."

Hover your camera over the check image and follow the prompts on the screen. The camera will automatically take a picture once it's properly aligned with the document and display a message stating the image was captured successfully. Press "OK" and flip the check over. Hover over the rear image.

Next, review the front image to ensure it's legible and the amount can be read. Then verify the rear image and ensure the check is properly endorsed. Finally, click "Submit."

A message will display stating that your deposit was completed successfully. Press "OK." Then tap "Done" in the upper left corner.

Forgot Password

From the login screen, click "Forgot Password," enter your Username and click "Submit."

Follow the prompts to reset your password and multi-factor authentication.

TRAILWEST BANK



Questions about Digital Banking?

Call (406) 523-5419

OR

Chat with us @

www.TrailWest.Bank

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