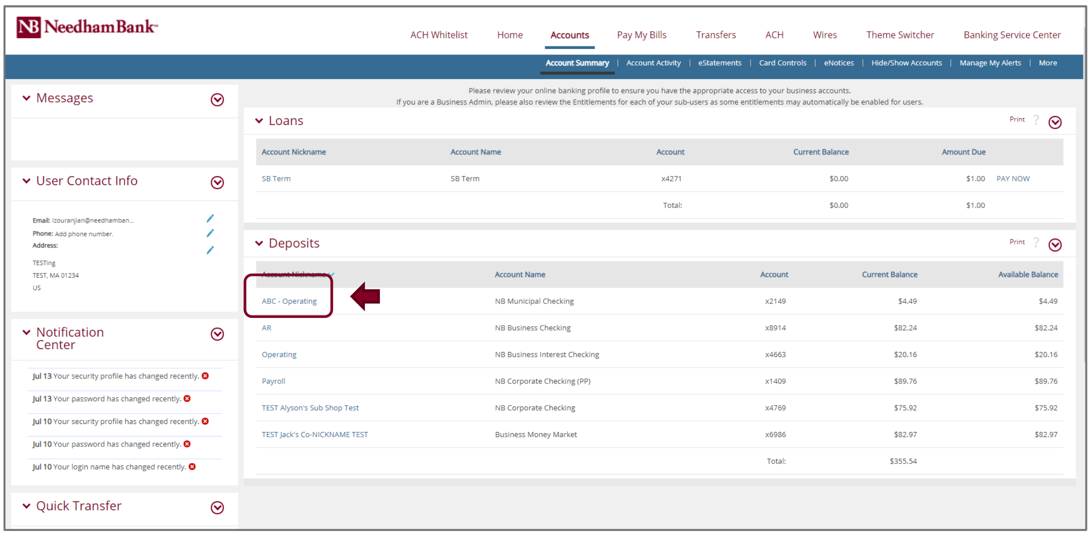
Accessing Account Numbers, History & Nicknames

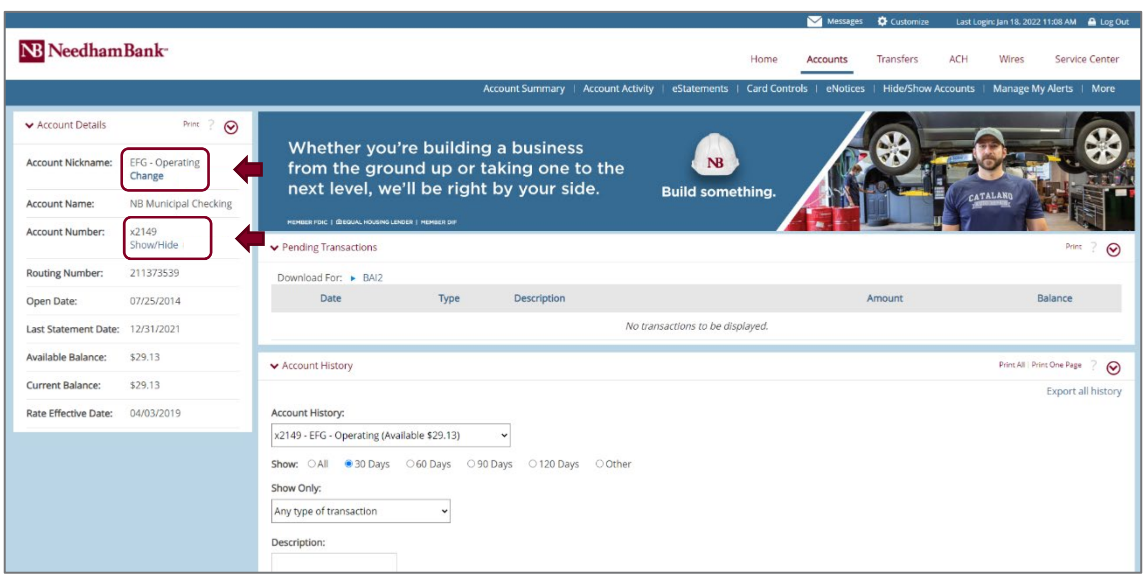
Accounts Module

The Accounts module provides a snapshot of your existing Needham Bank deposit and loan accounts and will display current and available balances.

From the **Account Summary** sub-module, select an account by clicking on the **Nickname** to view account activity for up to 16 months.



When you click on an individual deposit account, the left-hand menu gives you the option to change the account nickname and show the full account number.



Account Activity

NB Business Online Banking account activity data updates in real-time, so you can view account history with the most up to date information available.

To view transaction history: From the **Account Summary** page, select the account you would like to view by clicking the account's nickname under the **Account History** drop down menu.

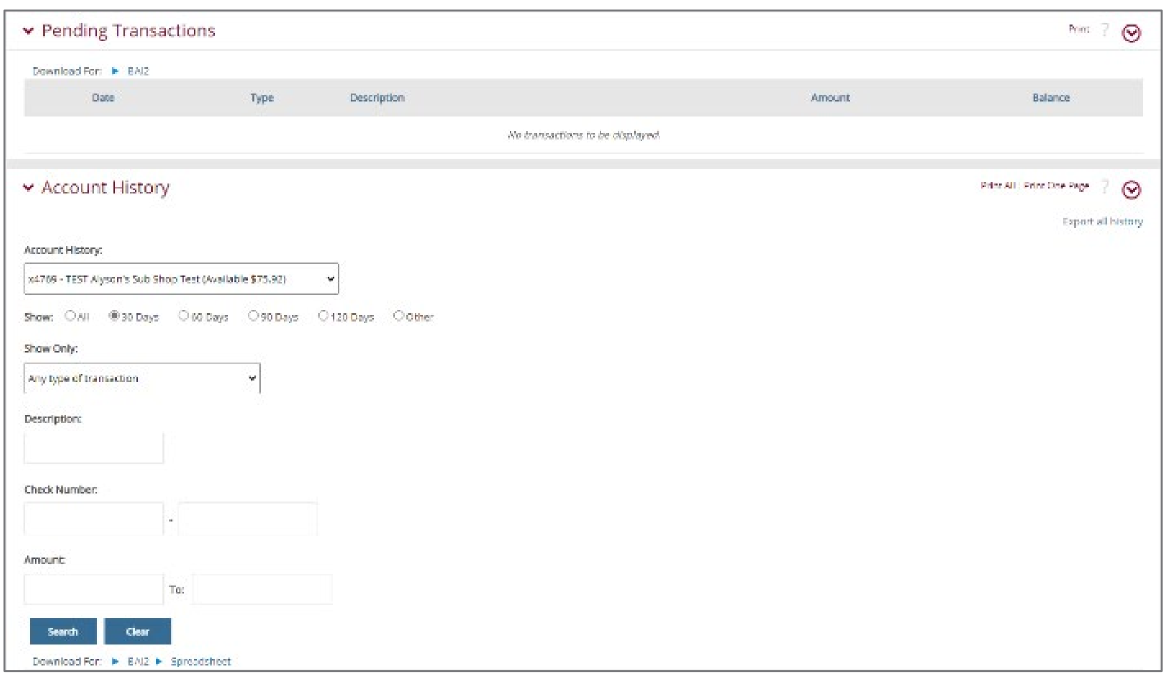
With the Account History screen, you can:

Review Pending Transactions

- In the Pending Transaction section, view transactions that are in process to post to your account.

Search Account History (up to 16 months available)

- Use the Account History Search fields to change the view of your account history.
- Search by Description of transaction type (i.e. Deposits, Withdrawals, Checks, ATM Transactions, ACH Transactions, and Bill Payments).
- Search by Check Number
- Search by Amount Range



Export Account Activity

Download the displayed account information as a .csv file using the Spreadsheet link, or in BAI2 format using the provided BAI2 link.

View and print images of the following (up to 16 months available):

- Checks cleared from the account
- Deposits completed in person at a Needham Bank Branch
- Mobile Deposits
- Needham Bank Remote Capture Deposits
- Needham Bank Lockbox Deposits