





Overview

Dashboard Widget


The dashboard is the landing page you will see when logging in to our Online Banking. This is a snapshot of your profile with Meridian Trust. It displays your share and loan balances with Meridian Trust as well as any other external accounts you have linked. There are also links to other services such as Credit Savvy, Linking External Accounts, recent and upcoming transactions, news, and mortgage applications.



Dashboard


 Is your contact information up to date? 


Accounts

Checking
\$85,294.73


 **CHECKING**
**935-0009


  **\$84,961.73**
\$84,961.73

 **CHECKING**
**935-0014

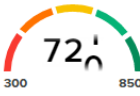
 **\$333.00**
\$333.00

Savings
\$26,041.14





 **HOLIDAY CLUB**
**935-0039

 **\$1,385.86**
\$1,410.86

Credit Savvy SM




300 850

 **Score** **Report** **Monitoring** **Savings**

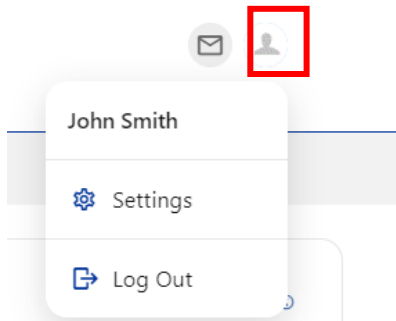
Start tracking your credit score and full credit report!

[Show my Score](#)

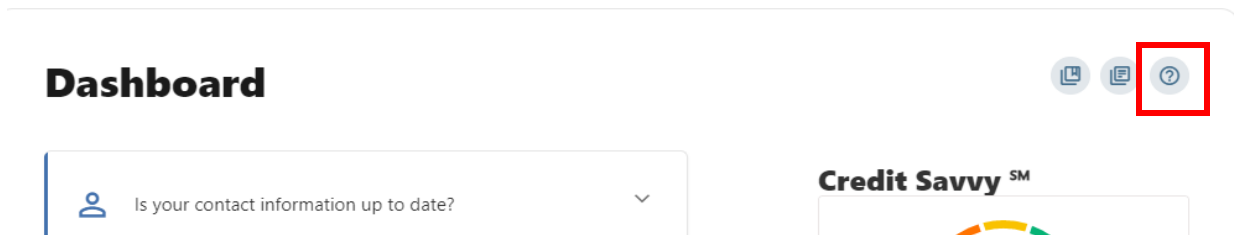
LinkExternalAccounts

[Get Started](#)

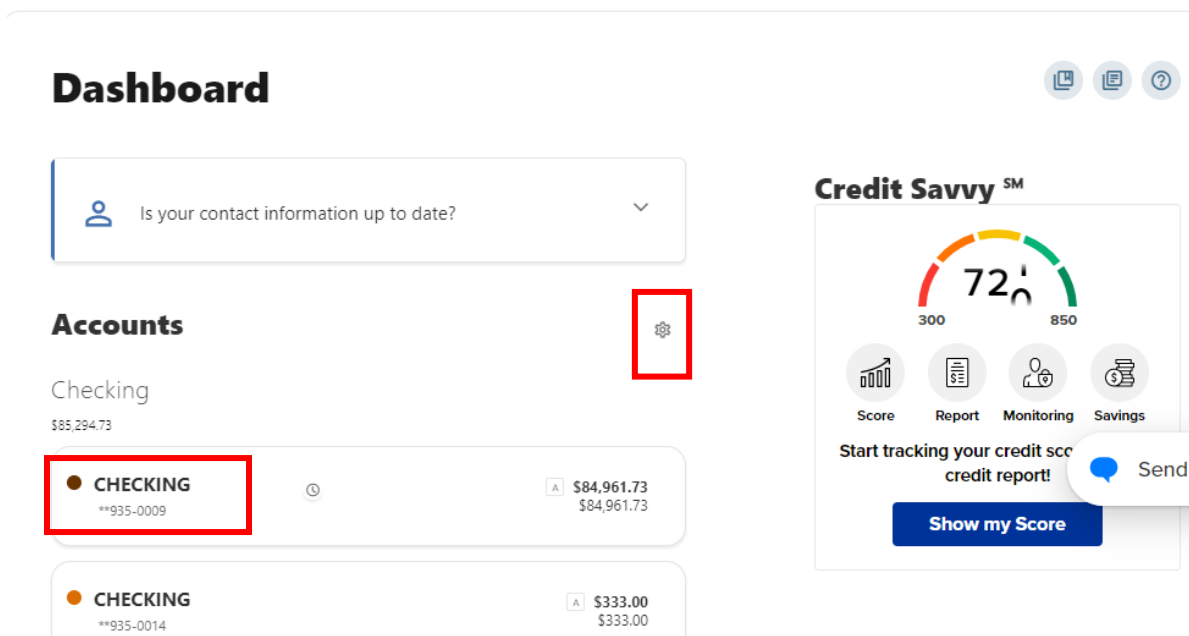
At the top of each page, an envelope icon will show, if clicked this can be used to link the member to the message center. If the person icon is clicked the member's name and a drop down will present. This can be used to link to settings or to log out.



The ? (*Help*) link will provide details and help specific to the widget being used.



Selecting one of the member's shares or loans will link them to the account details and transaction history. This opens the accounts widget automatically. Clicking the gear icon will allow members to add and remove accounts from the dashboard view.



Dashboard Settings

Accounts

Choose the accounts you'd like to appear on your dashboard. **You must select at least one account.**

Checking

☒  CHECKING **935-0009

☒  CHECKING **935-0014

Savings

☒  HOLIDAY CLUB **935-0039

☒  MONEY MARKET **935-0003

Accounts



Accounts Tax Information

Checking

2 accounts

\$85,294.73

 CHECKING  **\$84,961.73**
**935-0009 


 CHECKING  **\$333.00**
**935-0014

Savings

6 accounts

\$26,041.14

 HOLIDAY CLUB  **\$1,385.86**
**935-0039

 MONEY MARKET  **\$20,551.00**
**935-0003

 HOLIDAY CLUB  **\$333.00**

 **CHECKING** 
**935-0009

Current Balance

\$84,961.73

Available Balance

\$84,961.73

Transactions Account Details Analytics

 Search



Sort By: Default 



PENDING TRANSACTIONS

Pending transactions may not be the final amount that posts to account.

DATE	DESCRIPTION	AMOUNT
NOV 20 2020	POS Hold, AMAZON PRIME Miscellaneous	-\$12.99
NOV 20 2020	POS Hold, ARBY'S 5009014 Miscellaneous	-\$21.36



Clicking “Pay” on a loan will direct the member directly to the transfers screens to process the payment.

Loans		\$76,255.41
2019 FORD EXPLORER **935-0016	Pay	\$24,736.60 A \$0.00 >
2019 CHEVROLET TRA... **935-0013	Pay	\$51,518.81 A \$0.00 >

DashboardAccountsLoansFinancial PlanningTransfer & PayTools

Transfers

Make a TransferScheduledActivityMore Actions

Accounts

From Account

This input is required.

To Account

2019 FORD EXP... **935-0016 \$25,000.00

How Much

Amount *

When

Frequency

One Time

Date *

06-12-2023

Memo

Description (Optional)

Clicking on the Show My Score link in the Credit Savvy section will open the Credit Savvy widget and allow them to enroll in that service or review they can view their credit information if they have already enrolled.

Credit Savvy

759

300850

Score

Report

Monitoring

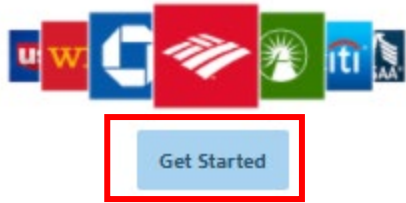
Savings

Start tracking your credit score and full credit report!

Show my Score


Click on Get Started under Link External Accounts to begin adding external accounts to view in the MTFCU digital service. This requires the member to sign into the other financial institution’s online service.

LinkExternalAccounts



The recent and upcoming transactions can be customized to display different timeframes and what to display by clicking on the gear icon.

Last 10 days




1 transfer

\$20.00

7 account alerts

Logged in 28 times

Next 5 days



4 pending transactions

-\$233.03

Dashboard Settings

Recent Activity
You can choose how many days of recent activity, and what types of information you'd like displayed on your dashboard.

How many days?

What to Display
Choose which activities you'd like displayed.

- ☒ Transfers
- ☒ New Messages
- ☒ Account Alerts
- ☒ Login Activities

Quick Links will take members to external sites for tools like mortgage loan applications.

Quick Links

[Mortgage Application](#)



Financial news will be posted by the marketing team to spotlight events as they see necessary.

Financial News

ORB Financial Sponsors Credit Unions for Kids!

ORB Financial is very active in raising money for Children's Miracle Network through Credit Unions for Kids, a national CMN sponsor.

January 21, 2014

Information Regarding Year End Tax Documents

Read this important article about year end tax documents for your Forms 1099, 1098 and 5498.

January 21, 2014