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- 1. View a listing of accounts accessible within Digital Banking.
- Shortcuts to commonly used features like 'Transfer Money Now' and 'Apply for a Loan' are located on the right side of the screen.
- Click 'Link Account' to pull in information from your other bank or credit union accounts.
- Select the 'Get Started' to configure Financial Tools to take the work out of staying on top of your finances. Make sense of your transaction history and see the categories where you spend the most money.
- Select the 'Options' icon next to each account to reveal multiple available quick actions.





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 Click, hold, and drag any account to the envelope icon, which appears at the bottom right side of the screen, to create a new account group.



 Name the new group and select the check mark to save. Additional accounts may be dragged into the new group or additional groups created.

New Group		×
Primary Savings 0000	:	
Available Balance	\$2,871.70	
Account Number	123458	

- **NOTE:** Additional account(s) may be moved into the newly created group or additional group(s) may be created if needed by repeating step 6.
- 8. Click on the pie graph at the bottom of the screen to view a distribution of funds across accounts accessible within Digital Banking.

ASSET SUMMARY		^
20% Primary Savings 1%2.873.70.547 Total Assets 20%	Primary Savings 0000 Available Balance Account Number View Transactions	19.74% \$2,871.70 123458
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(301) 863-7071 | <u>cpfcu@cpfcu.com</u>