FAQ (Frequently Asked Questions)

For Members in *Sharefax-Online*, How do I:

Tell members how to get to Sharefax-Online / Home Banking / Online Banking?

- https://www.sharefax.org - link is in the upper right corner
- https://myonline.sharefax.org - this is the direct URL link to the current OLB provider

Change my login from my Membership Number, to a login name

- Upper Right
- Settings
- + Profile
- Select User ID
- Change User ID
- Save

Rename a Share Account (renaming will allow a resort within groups, however by default all Share Accts are grouped by Checking Accts, Savings Accts, Certs, then Loans)

- Upper Right
- Settings
- + Accounts
- Select Share Account
- Add/Modify Nickname
- Save

I don't want to see a Share Account in my tiles/list in Home Banking

- Upper Right
- Settings
- + Accounts
- Select Share Account
- Select Checkbox for Hide Account

Add eAlerts

- Upper Right
- Settings
- + Security and Alerts
- Alerts

Get a list of eAlert activity, which shows what I'm signed up for

- Upper Right
- Settings
- + Security and Alerts
- Alerts
- Active Alerts are listed at the bottom of the screen

Transfer Money

- If looking at the tiles, select the FROM account/Share tile and drag that tile to the TO account Share tile

or

- Click Transfer at the top of the screen and fill in the From/To/Amount/Date

Transfer Money to or from outside the credit union

- Click Transfer at the top of the screen
- Click External Account Transfer
- Click Manage Accounts to add an External Account
- Click Add an Account & follow the instructions
- External Transfers can take several days to process

Add eStatements

- Log into Sharefax-Online
- Select one of the tiles or accounts on a membership wishing to receive eStatements
- Within Account Details page, select Online Statements
- Follow the enrollment procedure, which include asking for a valid email address; and as well ask for an Enrollment Verification Code*.
  *This Enrollment Verification Code displays within the PDF displayed on the page. The member pulls up the PDF page, retrieves the Code and types in the Code to the Enrollment Page. Federal Regulations maintain that in order to receive eStatements, members need to demonstrate the ability to view PDF files.
  NOTE: You cannot sign up for eStatements within XP2 bc there is no way for the member to demonstrate the ability to view PDF files within XP2.
- At the beginning of each statement cycle, members will receive an email directing them to log into home banking and review their statement

Remove eStatements

- Log into Sharefax-Online
- Select one of the tiles or accounts on a membership wishing to receive eStatements
- Within Account Details page, select Online Statements
- From the eStatement site, choose the Helpful Links tab
- Select the Opt Out option & confirm eStatement removal
  NOTE: In very rare instances where the member doesn't have online access anymore, the IT Dept can remove this manually via the eStatement site.
  NOTE #2: You cannot remove eStatements within XP2, bc the two systems do not communicate with each other in that way

Change eStatements delivery email address

- Log into Sharefax-Online
- Select one of the tiles or accounts on a membership wishing to modify eStatement email address
- Within Account Details page, select Online Statements
- From the eStatement site, choose the Helpful Links tab
- Select the Update Email option & enter the updated email address
  NOTE: This does not update anything in XP2 and is only for eStatement and eNotice delivery locations

Remove eStatements from a member that has been disabled in RM

- Log into the ID Connect site (https://www3.ids.com/), click Client Login.
- Reports > Manage Accounts > Enter in the Membership Number > View Member > Click Red Remove button on left side of screen

Other Important Information

- Maintenance Windows:
  - Sunday 4am-6am EST (coasp possible default downtime)
- For testing only, the RM site is: https://coasp-rm-cert01.fiservapps.com/Support/main.asp
- For phone numbers:
  - In RM, the day phone value is Cellular Number on XP2
  - In RM, the evening phone value is the Home Number on XP2