

HOW TO ACCESS

Organization or Church Account

OVERVIEW

After a user has been granted permission, these are the steps to view the account:

1. **Set up online access.** See separate instructions online at thesolomonfoundation.org/onlineaccess2.
2. **If user does *not* have a personal investment with TSF**, they will only see organization/church loan and investment information. Additional videos in the same link above will provide assistance.
3. **If user *does* have both personal and organization/church investments and loans**, they will see them together. The first step should be to sort them by marking the “heart” to favorite one or the other. Utilizing the **Account Nickname** features is also a great tool to keep accounts organized.

All questions and requests during this process
can be emailed to info@thesolomonfoundation.org.

DASHBOARD AT-A-GLANCE

The dashboard provides a comprehensive overview of financial data. On the left, a sidebar menu allows navigation between Accounts, Document Center, Account Transfer, Message Center, and Profile & Settings. The main content area is divided into several sections:

- Search Accounts:** A search bar at the top of the main content area.
- Favorites:** A section displaying favorite accounts with their available balances:
 - Church Demand Account (XXX123): 150,000.00
 - Previous Employer IRA (XXX456): 5,000.00
 - Personal Joint Savings (XXX789): 50,000.00
 - Personal 60 Month (XXX234): 25,000.00
- Investments:** A section showing investment details for the 'Sole Ownership - Church of Main Street Keystone - Organization Demand' account.

Investment Number	XXX123	Available Balance	150,000.00
Investment Type	Keystone - Organization Demand	Interest Rate	2.85 %
Interest Paid YTD	2,000.00	APY	2.89 %
- TRANSACTIONS:** A table showing recent transactions with columns for Effective Date, Transaction Date, Description, Amount, and Balance.

Effective Date	Transaction Date	Description	Amount	Balance
06/30/2021	06/30/2021	Compound Conversion	1,000.00	150,000.00
03/31/2021	03/31/2021	Compound Conversion	1,000.00	149,000.00
02/11/2021	02/11/2021	Deposit Conversion	25,000.00	124,000.00

1 MAIN MENU

Found on the lefthand side of the desktop screen. Select **Accounts**.

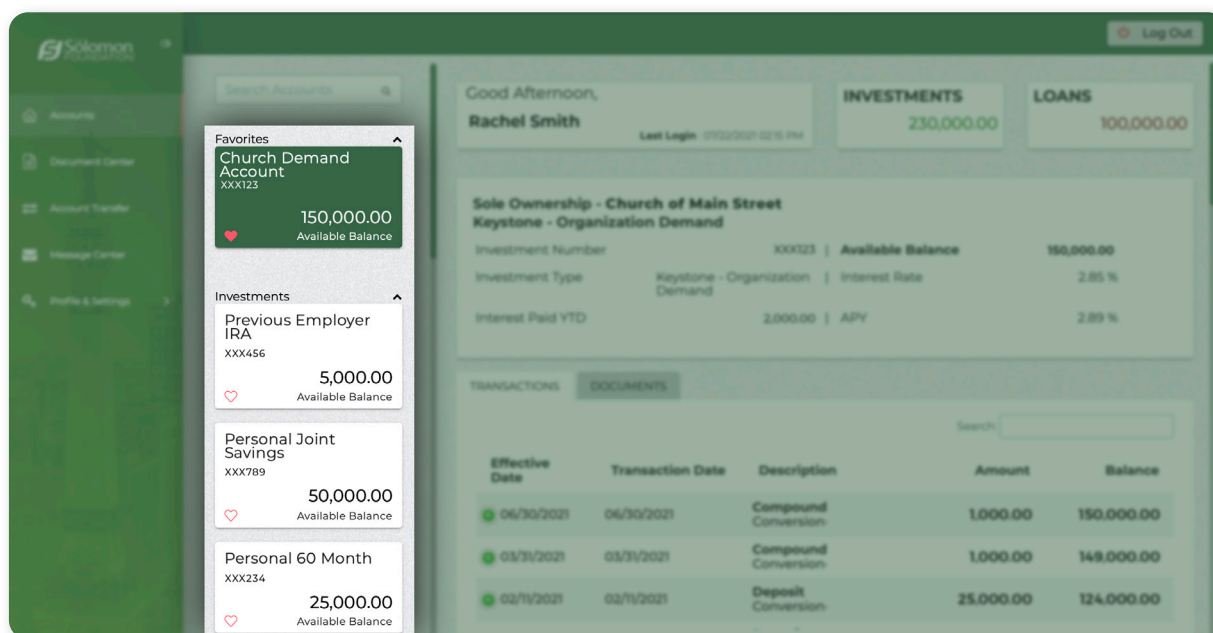
This screenshot shows the same dashboard as above, but with a green overlay that highlights the left sidebar menu. The 'Accounts' option is selected, indicating the path to view account details.

2 ACCOUNTS MENU

The middle section lists all accounts in the following order: favorite, active investments, active loans, inactive investments, and inactive loans. This list can be large, there is a scrolling feature in this section. *We strongly recommend utilizing the nickname feature so accounts are easy to view/manage.*

Notes:

1. In this example, the Church Demand Account is favorited. Selecting the heart icon will favorite an account and bring it to the top.
2. There is a scroll bar. Be sure to scroll to access any accounts out of view.
3. These accounts are nicknamed for quick reference. *We strongly recommend utilizing the nickname feature.*
4. Investment and loan numbers along with account totals are easy to view (excluding current interest accumulation since last quarter's compounding.)
5. The account highlighted in green will display further information in the window to the right.



3 ACCOUNT INFORMATION

The right section will display the details of the account highlighted/selected in green. Here you can view transactions and account details such as type, owner, rate, etc.

Solomon Foundation

Good Afternoon, **Rachel Smith** | Last Login: 07/22/2021 02:15 PM

INVESTMENTS 230,000.00 | **LOANS** 100,000.00

Sole Ownership - Church of Main Street
Keystone - Organization Demand

Investment Number	XXX123	Available Balance	150,000.00
Investment Type	Keystone - Organization Demand	Interest Rate	2.85 %
Interest Paid YTD	2,000.00	APY	2.89 %

TRANSACTIONS | **DOCUMENTS**

Search:

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4 TOP BAR

The top summary bar will have cumulative total of all accounts you have access to for loans and investments.

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5 TRANSFERRING MONEY

Important: There is building fraud protection.

Transfers **cannot** be processed between personal and organization/church accounts (internal and external).

Transfers **can** move money between personal TSF accounts and personal external accounts (example Wells Fargo), and also between organization/church TSF accounts and organization/church external accounts.

Transfers **can** move money from TSF to TSF account (however, once again you are not able to move between personal and organization/church account).

1. Examine what **External Accounts** are connected – these can have nicknames (example: Church Wells Fargo).
2. Examine what (if any) recurring transactions are set up by clicking on the **Scheduled** tab.
3. To submit a transfer, select the **To** and **From** account, the **amount**, the **frequency** and the **date**. Click **continue**, confirm the details, and click **confirm** if everything appears correct.

The screenshot displays the Solomon Foundation's online access interface. On the left is a green sidebar with navigation links: Accounts, Document Center, Account Transfer (highlighted), Message Center, and Profile & Settings. The main content area is divided into two panels. The left panel, titled 'ACCOUNT TRANSFER', contains fields for 'From Account *', 'To Account *', a checkbox for 'Full Disbursement', an 'Amount *' field set to '0.00', a 'Frequency *' dropdown set to 'One Time', and a 'Transaction Date' field set to '7/26/2021'. At the bottom of this panel are 'CLEAR' and 'CONTINUE' buttons. The right panel, titled 'EXTERNAL ACCOUNTS', has tabs for 'SCHEDULED' and 'EXTERNAL ACCOUNTS'. Below the tabs is a section 'ADD EXTERNAL ACCOUNT' with a note: 'For security purposes, please allow 2-3 business days for verification before using new external accounts.' It includes a 'Show 10 entries' dropdown and a search bar. Below this is a table of external accounts:

Constituent Name	Account Number	Routing Number	Financial Institution	Options
Rachel Smith	123456	012345678	Checking - 456789	Delete
Church of Main Street	654321	876543210	Hometown Bank - 987654	Delete

Below the table, it says 'Showing 1 to 1 of 1 entries' and includes pagination links: 'First', 'Previous', '1' (selected), 'Next', and 'Last'. A 'Log Out' button is in the top right corner.