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.
1 MAIN MENU

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

4 **TOP BAR**

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