

First Day Online Banking Checklist for Personal Users

Welcome to the new system! We encourage you to dive in and look around.

1. Verify that all your accounts are displaying on the home page.
2. Click on all accounts to ensure the history is showing along with any associated transaction/check images.
3. Verify that you can view your account statements.
4. Recurring transfers between accounts will need to be reestablished.
5. Any account alerts you had established will need to be reestablished.
6. If you use QuickBooks, Quicken, or other third-party software you will need to reactivate your online banking connection according to the detailed instructions in the Quick Reference Guides area of this resource page.
7. If you are a Bill Payment user, please verify that you can access Bill Payment.
Note: There were no changes to the Bill Payment system so there were no changes made regarding your payees or schedules.
8. If you are a mobile banking user:
 - Apple users with automatic updates selected will be updated to the new Santa Cruz County Bank mobile banking app.
 - Other users will receive an error message when opening the old app and will need to proceed to the App Store to download the new Santa Cruz County Bank mobile banking app. Search for Santa Cruz County Bank, and look for the image shown on the right. Once the new app is downloaded, delete the old app.
 - Login ID and password are the same for online and mobile banking.
9. COMING SOON – Card Controls. Turn cards on and off, create transaction limits, block locations, set up a card use radius, create merchant limits, access instant balances, and more.
10. Check out a few of the new features designed to improve your workflow and efficiency:
 - CardSwap allows account holders to easily switch payment cards for their subscriptions to streaming services, memberships, and other automatic subscription payments.
 - ClickSWITCH allows account holders to easily move direct deposits to their Santa Cruz County Bank account.
 - Take control of your finances with our new “Financial Tools” feature where you can also link accounts from other banks, located at the top of the home page.



These are just a few of the new and exciting features the system has to offer.