

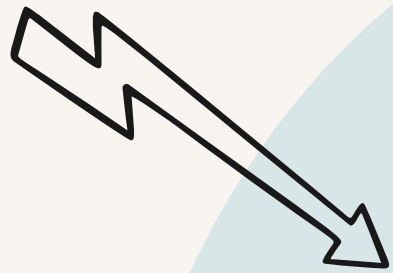


Expanding ScreenSteps

How to Bring On **New Teams** with **Confidence**

Presentation by: Jonathan DeVore & Greg DeVore

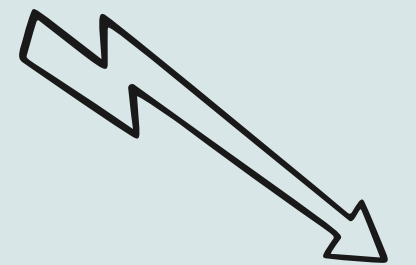
Constantly Being Interrupted



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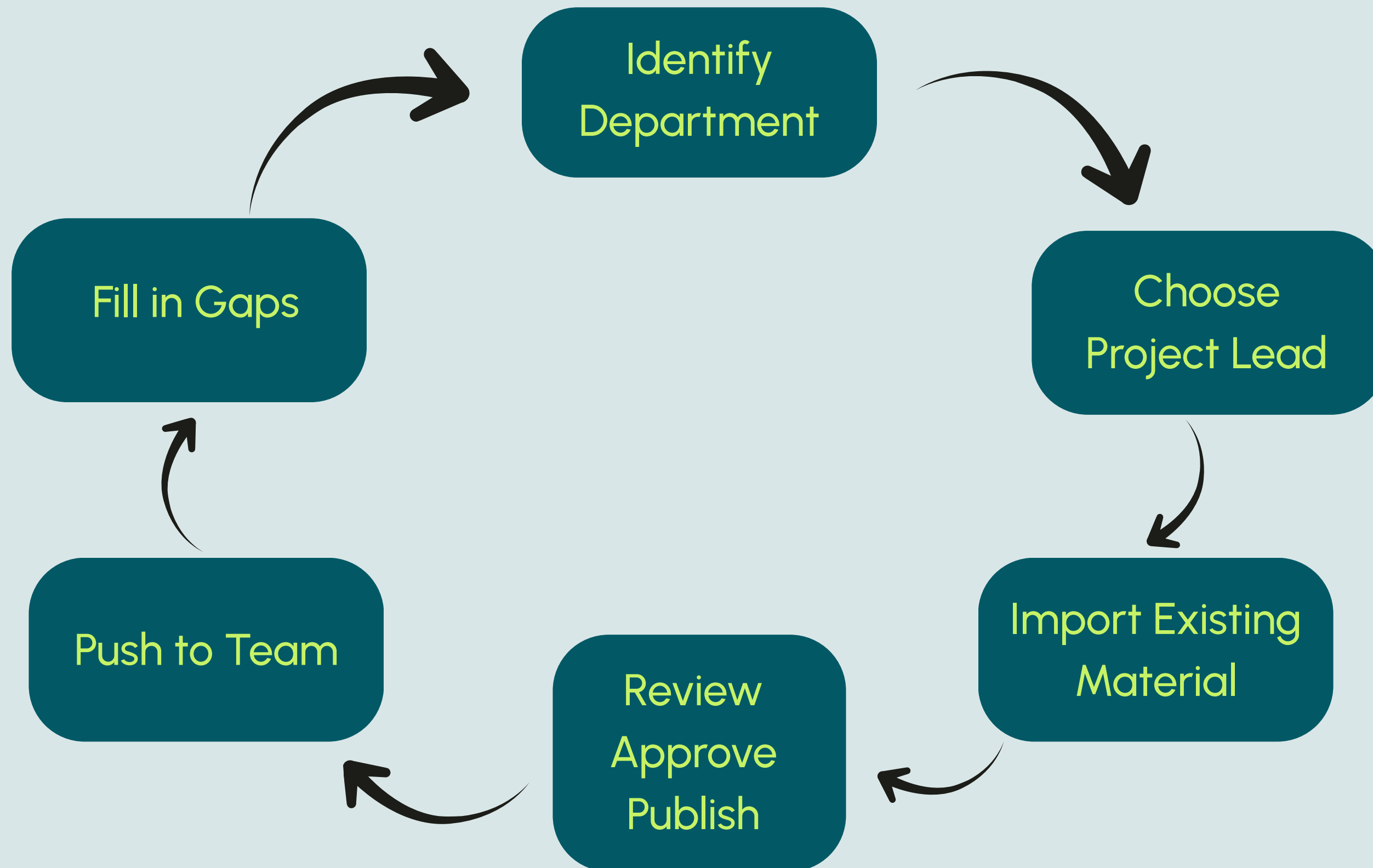
Training is a Train Wreck



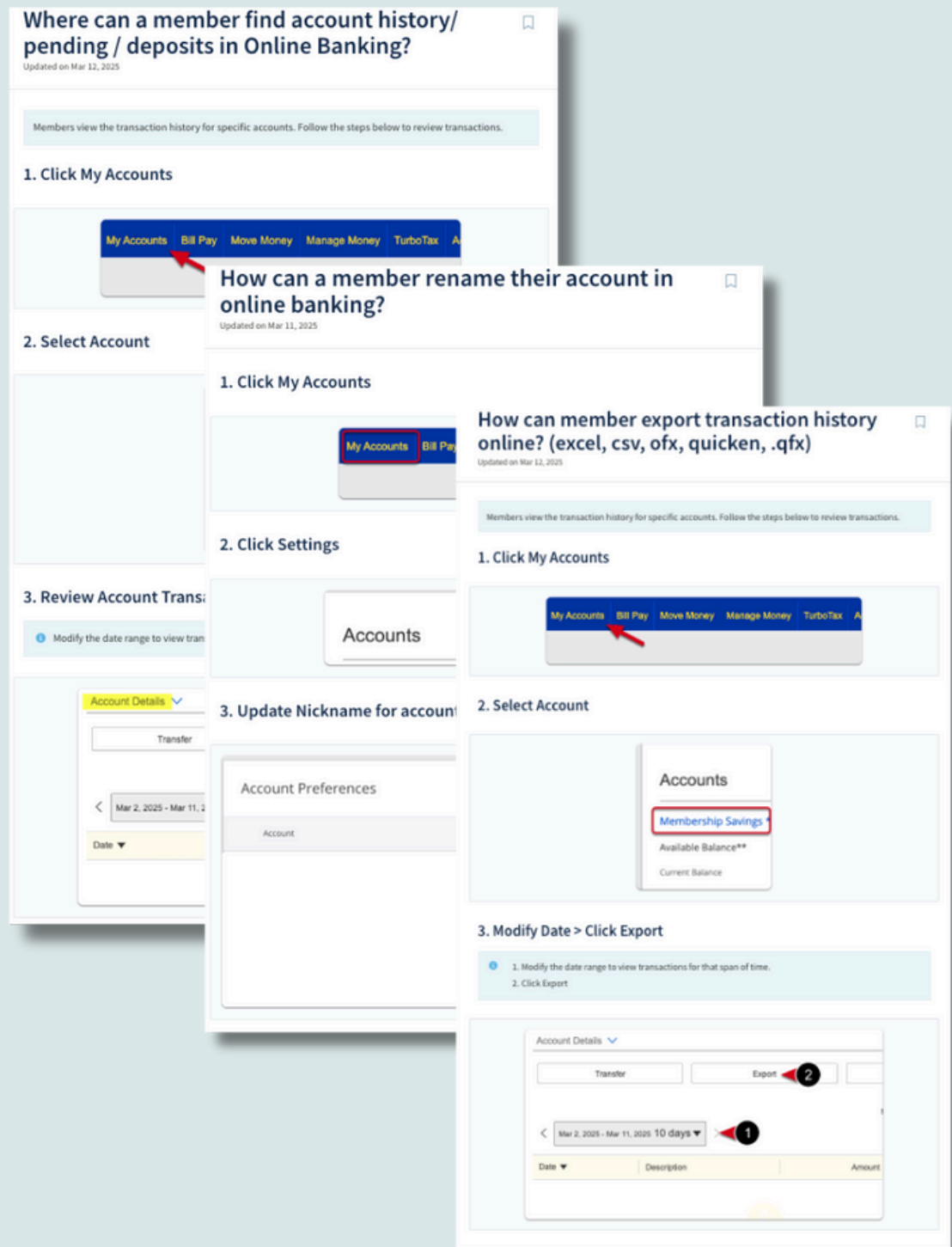
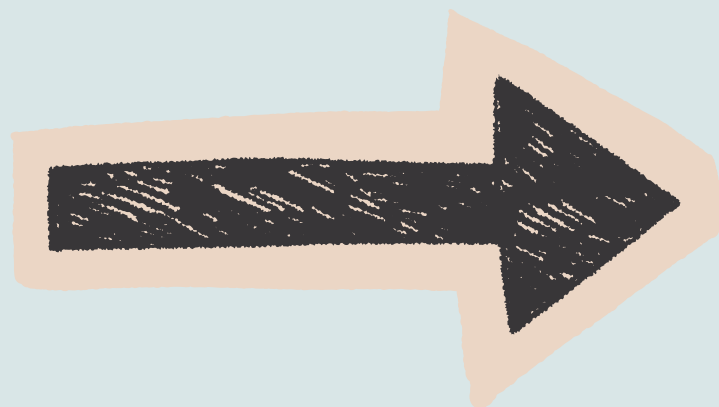
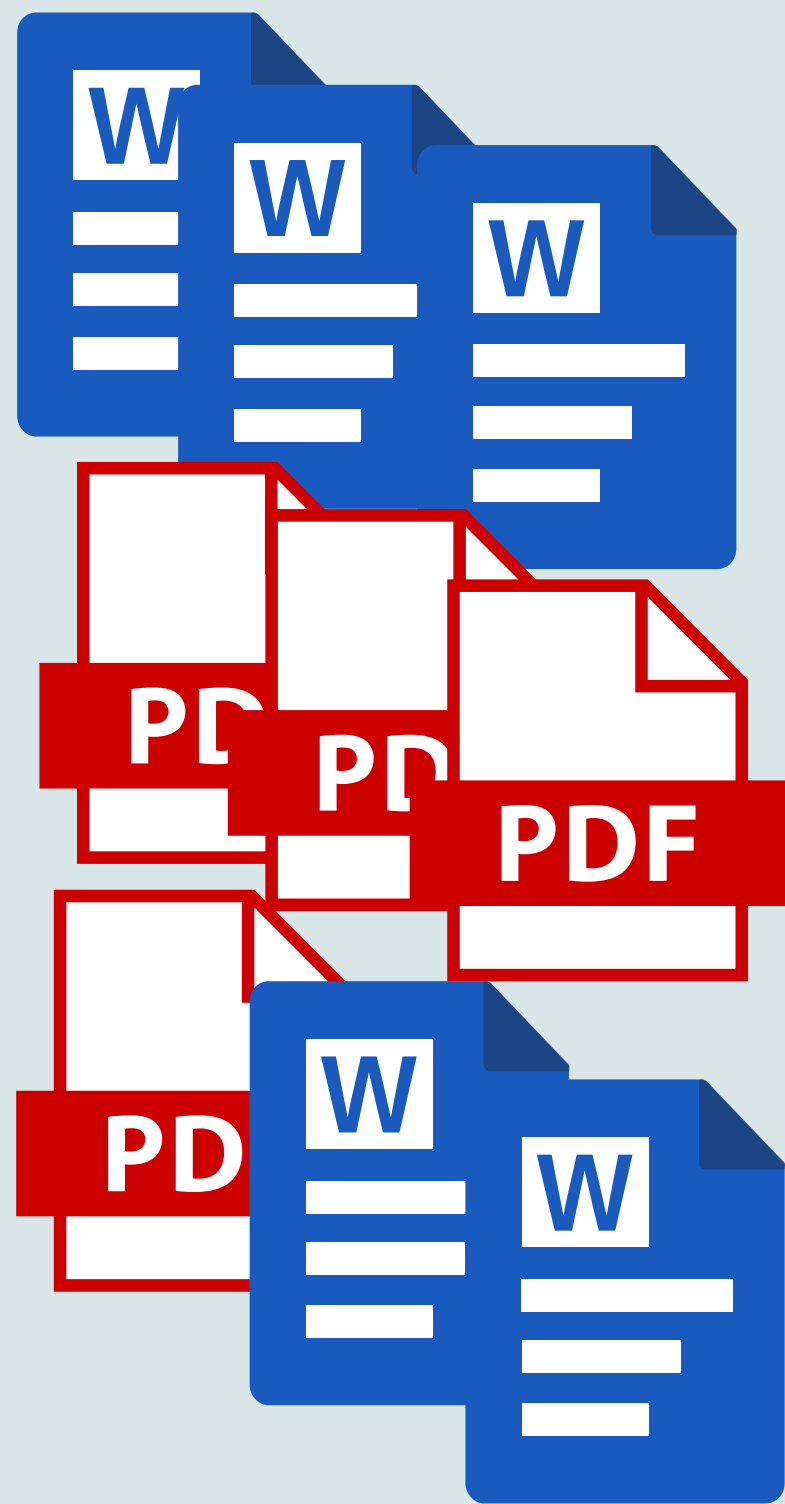
Employee Just Gave 2-Weeks Notice



Overview of Plan



Bulk Import



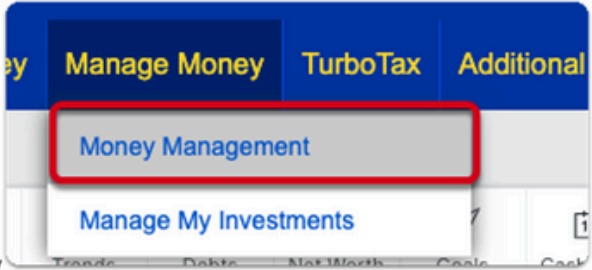
Bulk Import

Document1

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OK, so if a member has a mortgage at another financial institution, you can add the accounts to



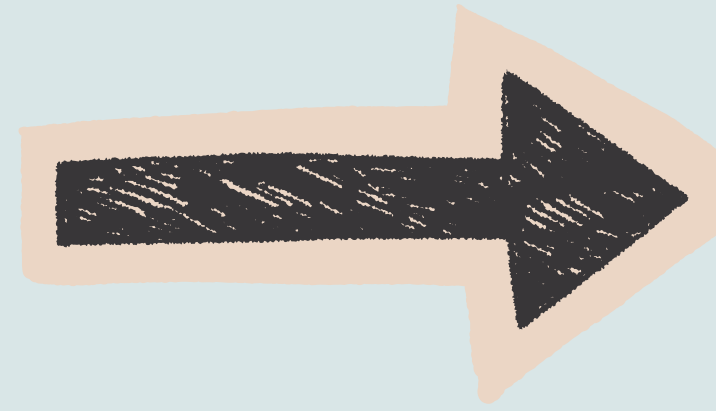
their portal so they can view the total amount of their mortgage. A mortgage is basically a loan for a house, and our credit union does not actually have, we don't allow or offer mortgages, but we can make it so that you can view your mortgage payments and everything in our online banking platform.

So you're going to want to navigate over to manage money and look at the money management tab. Money management is going to have lots of available options for managing your money. Once you're in there, you're



going to add an account. This is going to be adding your mortgage account from another financial institution, and this button is big, and it's blue, it's got a plus icon, and you're going to click that. Once you do that, you're going to fill out all the fields and put in your other financial institution's account information, and then we'll be able to sync those two things together.

Page 1 of 1 179 words English (United States) Focus 130%

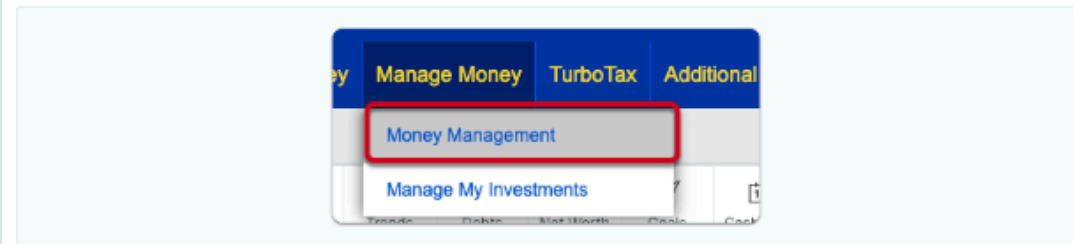


How members can add Mortgage Information

Updated on Mar 17, 2025

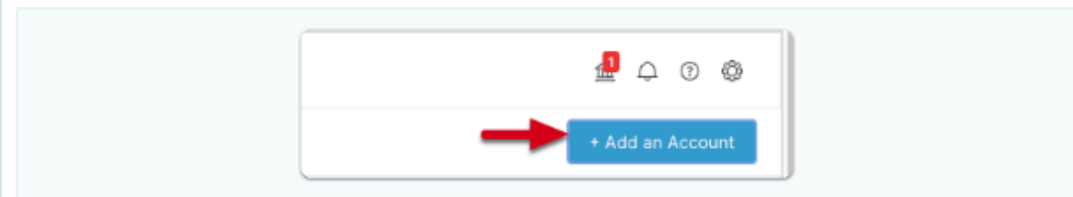
If a member has a mortgage at another financial institution, they can add that account to their portal so they can view the total amount of their mortgage.

Navigate to Money Management



Click Add an Account

The account can be to any financial institution.



How Can You Upgrade?

Fill out the form on this page. →

- + Request an upgrade
- + Work with Mark for a custom plan
- + Roll out upgrade

screensteps.com/account-upgrade

