

COALISLAND CREDIT UNION ONLINE SERVICES



**Coalisland
Credit Union**

DIGITAL WHEN YOU WANT IT
human when you need it



GETTING STARTED...

Step One: Registering for access

The most convenient way in which you can register for access to our online services is by visiting www.coalislandcu.com and completing the quick and easy process. Simply click on the "Register" tab at the top of the home page and follow the step by step instructions. For this you'll need your CCU member number, so make sure you have this to hand or telephone the office for over the phone verification.

Upon completion of the registration section, a member of staff will send a SMS temporary 24 hour PIN code to your mobile phone. You will be able to change this temporary PIN to digits of your own choosing after your initial log in.

Alternatively, if you are in our office then you can register through a staff member and receive a PIN via SMS.



GETTING STARTED...

Step Two: Logging in

Once you've registered, every visit to the website from then on will see you using only the "Login" tab at the top of the homepage.



The screenshot shows the Coalisland Credit Union website's Member Area Login page. At the top, there is a navigation bar with links: HOME, ABOUT US, LOGIN, JOIN, and APP. Below the navigation bar, the main heading is "MEMBER AREA LOGIN". A yellow banner below the heading contains text about logging in. The login form has two input fields: "Member Number" and "Date of Birth". Below these fields is a "Log In" button. To the right of the login form, there is a "RECOVER" section with links: "I forgot my PIN", "I forgot my Online Access", and "I forgot my PIN?".

When you hit the "Login" button, you will be asked first to enter your member number and your date of birth. The second screen will ask for three of the six digits from your PIN number – this will be the case each time you log in, so it is crucial that you keep your PIN safe and secure.



The screenshot shows the Coalisland Credit Union website's Member Area Login page after the first step. The "Member Number" field is now filled with "123456" and the "Date of Birth" field is filled with "12/12/1980". The "Log In" button is highlighted. Below the login form, there is a "RECOVER" section with links: "I forgot my PIN", "I forgot my Online Access", and "I forgot my PIN?".

Please note you need to login for the first time on the website to initially verify your mobile telephone number . After you have done this you can then download the app if you wish.

GETTING STARTED...

Step Two: **Logging in**

Once successfully logged in you will be brought to the Member Area, from which you can select which service it is that you require.



ONLINE BANKING

To check your balances on either shares accounts or loans, simply click on the “Launch Now” tab within the online banking menu in the member area.



For security reasons, you will be asked to confirm three of the six digits from your PIN number. Simply type in the requested digits, and hit “Login.”



You will then be brought to a dashboard area which displays all of your account details and balances.



E-STATEMENTS

You can access and print E-statements for your savings or loan accounts at any time. Simply select "E-Statements" from the menu on the left hand side. This will take you to the E-statements page. Enter the date ranges you require, and click on "Get E-Statement." This will then generate a printable statement showing all transactions on the account within the selected timeframe.



MANAGE PAYEES

The easiest way to keep track of your payees, or to add new ones, is through the “Manage Payees” tab on the left hand menu. Once selected, this will display a full list of all payees associated with the account, allowing you to manage the list and delete any outdated payees.



You can also click on the “Add new external account” tab if you wish to add new payees to the list.

Please note this can only be done via the website login and not on the app.

SET UP AN EXTERNAL PAYEE

Before you attempt to set up an external payee, please ensure that the correct mobile number is registered to your account, as you will be sent a verification code to that mobile number to confirm the new payee.

Please note that when setting up a new payee, it can only be done online and not through the app. Subsequent payments to the same payee can then be made via either the online portal or the app.

Setting up external payees, to transfer your money to, couldn't be easier.

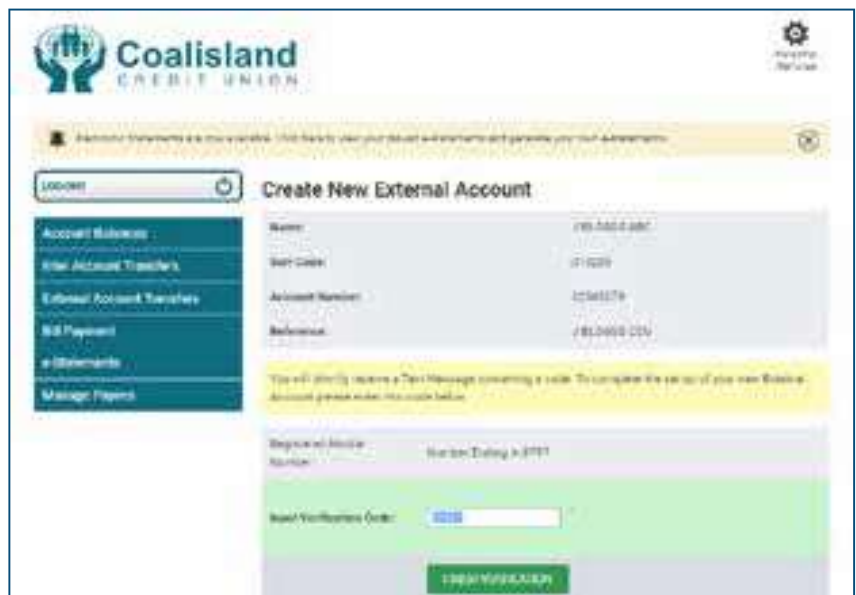
- Simply click on the "Add new external account" tab within the "Manage Payees" section, and insert all the relevant details.
- Please ensure that the sort code and account number are accurate,
- Don't forget to use an appropriate reference so the payee can easily identify the payment as having come from you.
- When finished, click on "Save Details"

The screenshot shows the 'Create an External Account' form on the Coalisland Credit Union website. The form is titled 'Create an External Account' and includes a 'Logout' button. A sidebar on the left contains links: 'Account Balance', 'Make Account Transfers', 'External Account Transfers', 'All Payments', 'Statements', and 'Manage Payees'. The main form area has a heading 'Add your own Sort Account Details or someone else's'. It includes a 'Payee Name' field with a dropdown menu showing 'KLODGS B&C' and a note 'No form of this account information is being passed along to'. Below this are 'Address' and 'City/Town' fields. A green highlighted section contains 'Sort Code' (010900) and 'Account Number' (4112 880). Further down are 'Sort Code' (010900), 'Account Number' (4112 880), and 'Reference' (010900) fields. A 'Save Details' button is at the bottom. The footer contains 'Information Security Policy', 'Terms & Conditions', 'Sales Terms', and a 'Contact Us' button.

SET UP AN EXTERNAL PAYEE

The final stage in the process is to complete the setting up of the new external account using the five-digit verification code sent via text to your mobile number. Once you have inserted the code as prompted, click on “Finish Verification” to complete.

When you go into external account transfers, your new payee will now be listed and available for use. Remember you can adjust these at any time through the “Manage Payees” tab on the left hand menu.



The screenshot shows the 'Create New External Account' form in the Coalisland Credit Union online portal. The form is divided into two main sections: a left-hand menu and a main content area. The left-hand menu includes links for 'Account Balances', 'New Account Transfers', 'External Account Transfers', 'Bill Payments', 'e-Statements', and 'Manage Payees'. The main content area contains the 'Create New External Account' form. The form has a header with the Coalisland Credit Union logo and a 'Logout' button. Below the header, there is a 'Create New External Account' section with a 'LOGOUT' button and a 'Create New External Account' link. The form fields include: 'Name' (pre-filled with 'JEN HILL'), 'Bank Code' (pre-filled with '01000'), 'Account Number' (pre-filled with '00000000000000000000'), and 'Reference' (pre-filled with '00000000000000000000'). A yellow banner below the form states: 'You will shortly receive a Text Message containing a code. To complete the setup of your new External Account please enter this code below.' Below the banner, there is a 'Registered Mobile Number' field (pre-filled with '0800 000 0000') and a 'Verification Code' field (pre-filled with '0000'). A green 'FINISH VERIFICATION' button is at the bottom of the form.

EXTERNAL ACCOUNT TRANSFERS/ TRANSFER TO OTHER ACCOUNTS

When you're ready to make your payment, click the "External Account Transfers" tab on the left hand menu. This will open up a transfer page within which you will enter all relevant details and instructions.



The "From" account will always be from your regular shares account.

The "Message to appear on your statement" is your opportunity to tag the transfer with something which you will remember, such as who/where the payment is going to or why.

Clicking on the dropdown menu at "To account" will open up a list of all the payee accounts which you have set up. If you have not yet completed this task, please refer to previous section.

"Amount" is the amount which you wish to have transferred.

Once you are happy with all of the information entered, click "Next"

MAKING A PAYMENT/TRANSFER

A summary screen will then appear showing all details of the transfer. Once you are completely happy that everything is accurate, click “Confirm” to complete the transfer.



The screenshot shows the 'External Account Transfers' confirmation screen in the Coalisland Credit Union online portal. On the left is a sidebar menu with options: Account Overview, My Account Transfers, External Account Transfers (selected), Bill Payment, e Statements, and Manage Payments. The main area is titled 'External Account Transfers' and includes a sub-header 'Please confirm the transfer details'. It displays a table with transfer information:


From Account	To Account
Account Name: Regular Savings Account Number: XXXX5678 Reference: 123456789	Account Name: JBL0005 4000 Sort Code: 011000 Account Number: XXXX1234 Address: 11-15A Road Anytown Anyshire BT12 3BC
Message to appear on receiving statement: JBL0005 CTA	
Amount: £1.00	

At the bottom of the main area are two buttons: 'GO BACK' and 'CONFIRM'.

BILL PAYMENT


You can pay bills using your credit union savings.

- The 'From Account' will always be your 'Regular Shares' which are your savings
- Enter the message to appear on your statement
- Choose the utility bill you require from the dropdown menu or select 'click to setup Utility Bill'
- Enter the Bill Reference – this is the reference the bill payment processor will see.
- Enter the amount you wish to send.

The screenshot shows the Coalisland Credit Union website's 'Bill Payment' section. On the left is a navigation menu with options: 'Account Balances', 'Initiate Account Transfers', 'External Account Transfers', 'Bill Payment', 'Statements', 'Manage Password', and 'Document Upload'. The 'Bill Payment' option is highlighted. The main content area is titled 'Bill Payment' and includes a note: 'Online Bill Payment is available from 9am to 5pm (Mon-Fri)'. Below this, there are input fields for 'From Account' (with a dropdown menu), 'Bill Reference', 'Bill Reference', 'Bill Reference', and 'Amount'. A green 'Pay Bill' button is at the bottom right. The footer contains links for 'Information Security Policy', 'Terms & Conditions', and 'Privacy Policy'.

INTER ACCOUNT TRANSFERS / TRANSFER BETWEEN MY ACCOUNTS

- If you have a loan(s) you can transfer money from your savings to pay off the loan(s).
- Select 'Regular Shares' which is your savings, in the 'From Account' dropdown menu.
- Enter a message/reference – this will appear on your statement.
- Select the loan you wish to pay under the 'To Account' dropdown menu.
- Enter a message/reference – this will appear on your statement.
- Enter the amount you wish to transfer.




The screenshot shows the Coalisland Credit Union website interface. At the top left is the Coalisland Credit Union logo. To its right is a 'Logout' button with a power icon. Further right is a 'Personal Settings' gear icon. Below the logo is a sidebar menu with options: 'Account Information', 'Inter Account Transfers', 'External Account Transfers', 'Bill Payment', 'Statements', 'Manage Paper', and 'Document Upload'. The main content area is titled 'Inter Account Transfers' with the subtitle 'Transfer money between your Credit Union accounts'. It contains two dropdown menus: 'From Account' (set to 'Regular Shares') and 'To Account'. Below these are two text input fields for 'Message to appear on your statement', each with a question mark icon. At the bottom of the form is a green 'Transfer' button. The footer includes links for 'Information & Security Policy', 'Terms & Conditions', and 'Privacy Policy', along with a 'Log Out' button.

DOCUMENT UPLOAD

Use this tab to upload support documents for your loan application or to send us proof of ID, change of address documents etc.

- Choose the file to be uploaded from your device.
- Select the Document Type from the dropdown menu.
- Select Upload Document.



The screenshot shows the Coalisland Credit Union website's document upload interface. On the left is a dark teal sidebar menu with options: Account Balances, Make Account Transfers, External Account Transfers, All Payments, Statements, Manage Loans, and Document Upload (which is highlighted). The main content area is titled 'Document Upload' and includes instructions: 'Upload your documents to attach a document to your loan'. It features a 'Choose file' button, a 'No file chosen' text, and a 'Document Type' dropdown menu. A green 'UPLOAD DOCUMENT' button is positioned below the dropdown. A yellow warning box at the bottom states: 'Only the following file extensions are allowed: .png, .gif, .jpeg, .jpg, .pdf, .png. Each document must be less than 10MB in size.' The footer contains links for Information, Security Policy, Contact Us, and Search, along with the Amazon logo.

USEFUL INFORMATION



**Coalisland
Credit Union**

Initial Login

You can only verify your mobile telephone number via the website login and then you can download the app for future use.

Incorrect Logins

- If you incorrectly login 20 times in a row on the website, your PIN will be deactivated. You will need to be issued with a new PIN to proceed.
- If you incorrectly login 5 times in a row on the mobile app, the app will block you. You must uninstall and reinstall the app to activate it again.

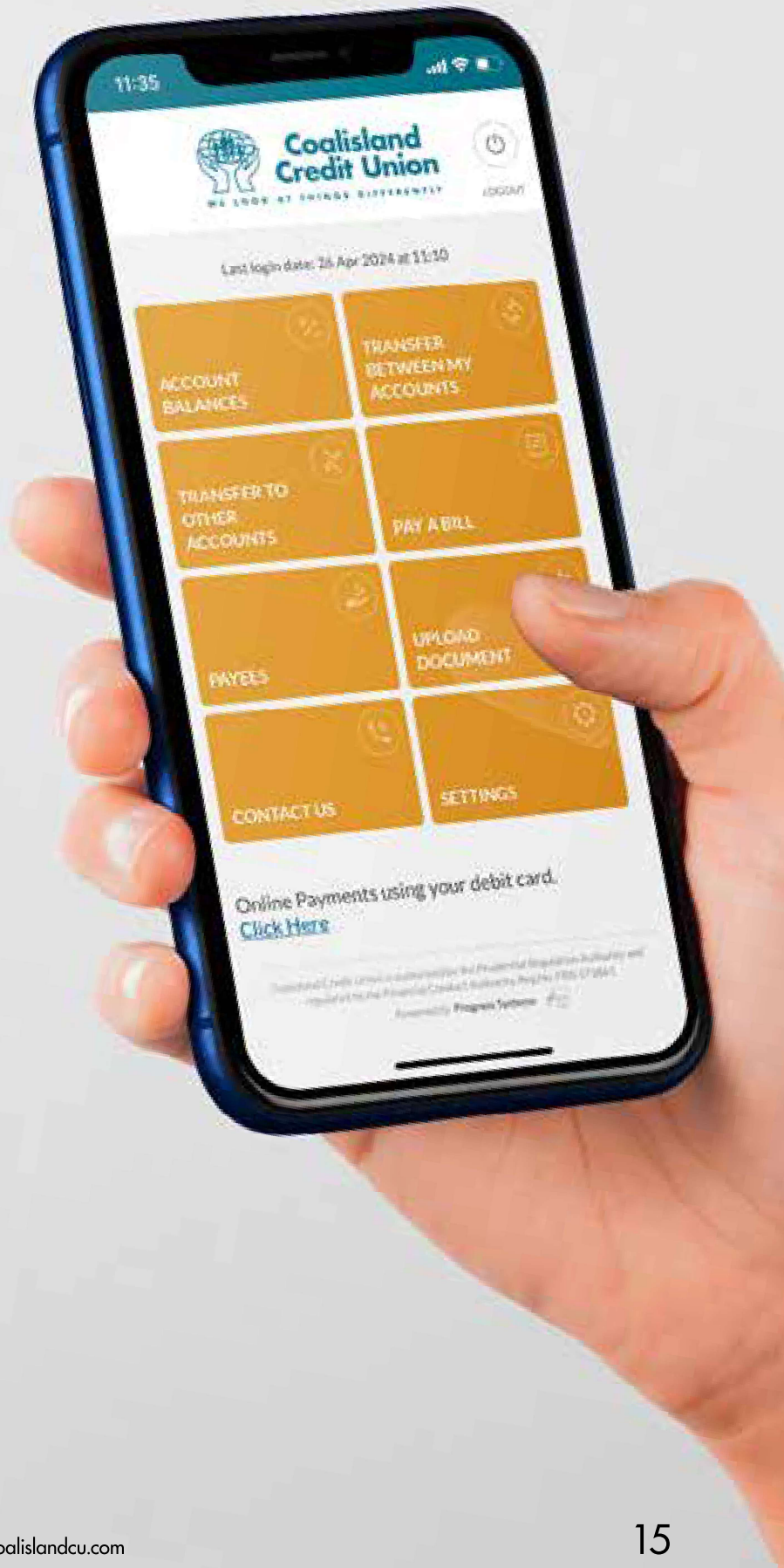
External Transfers

Transfers sent externally are not instant, they will take a few hours to appear in your bank/receiving bank.

If the transfer is done at the weekend it will not reach the receiving bank until Monday.

Pins

- If you lose your pin a replacement pin may incur a charge.





Coalisland Credit Union

Services

- **Electronic payments**
(wages, pension, benefits,
EMA paid into your CU account)
- **Online Access**
- **Mobile App Available**
- **Fully Digital Loans**
- **Withdrawal Transfers to
Bank Account**
- **Flexible Loan Repayments**
- **Free Life Savings & Loan
Protection Insurance**
- **Free Death Benefit Insurance**
- **Foreign Exchange**

Call in and see
how **YOU**
can benefit...

Coalisland Credit Union Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.
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