PFSBMobile Application User Guide - iPhone

PFSBMobile App

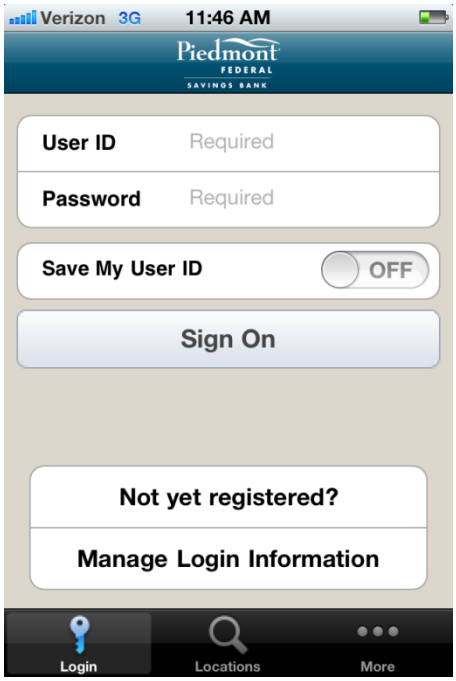
Download the application from the App Store and then launch. Once the application is launched, the **Sign On** page will populate.

First time users will select **Not yet registered?** And complete the registration process.

Returning users will enter their User ID and Password to obtain access to account information.

The option to **Save My User ID** may be turned on from this page.

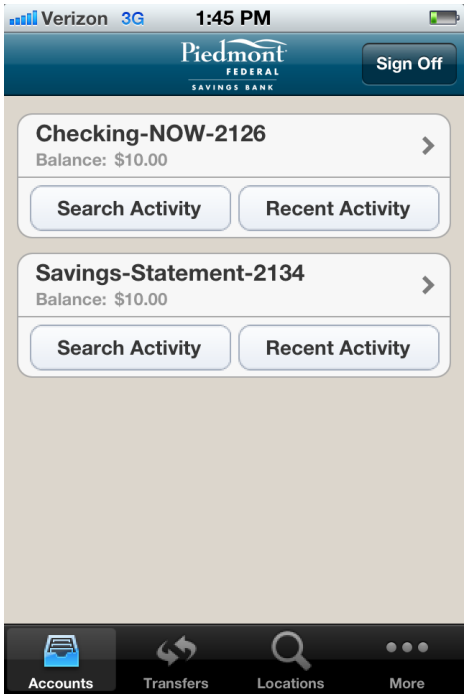
When using a device other than the one used at setup, users will be prompted to answer the security questions provided at registration.



Home Screen

After signing into PFSBMobile, users will be at the **Accounts** page.

On the bottom of the screen, users will have access to other Menu items including **Transfers**, **Locations**, and **More**.



Accounts

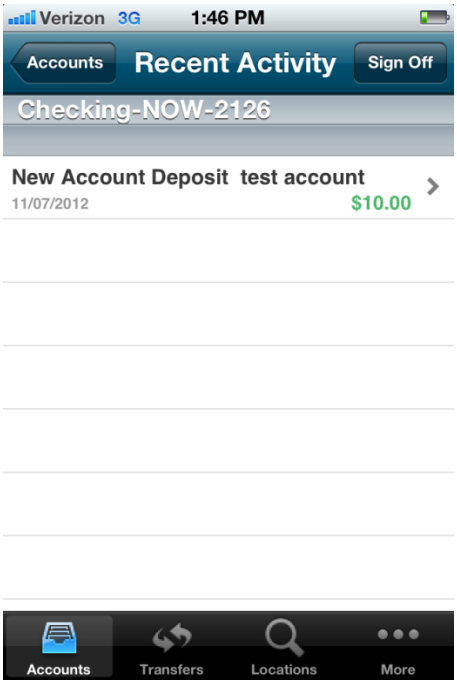
Users can select the **Accounts** link on the Home page to view a summary list of accounts and balances on the Account Summary page. The balance displayed is the available balance for deposit accounts and the outstanding (owed) balance for credit accounts.

Each listed account can be selected to view the current balance, available balance, and recent activity or perform a specific search activity for the account.

Recent Activity

If users select a specific account on the Account Summary page and then select the **Recent Activity** link on the specific account page, a list of recent transactions (typically last 90 days) is retrieved for the account.

More detailed information can be retrieved about the transaction by clicking the corresponding transaction.



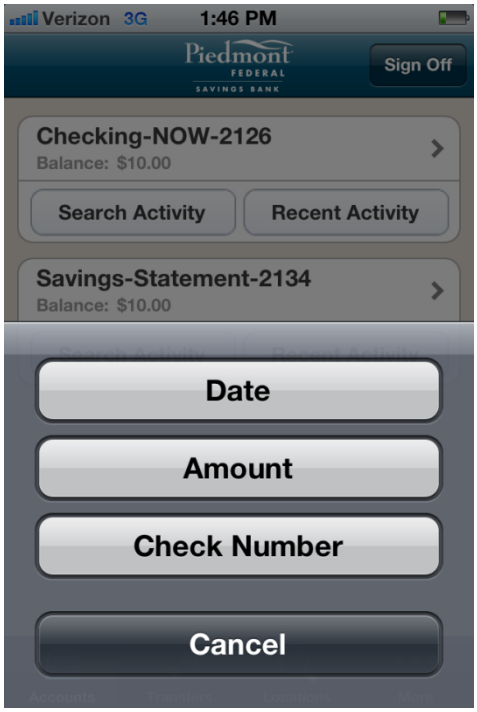
Search Activity

Users can select the **Search Activity** link on the specific account page to search account transactions.

Transactions can be searched by:

- Date
- Amount
- Check Number

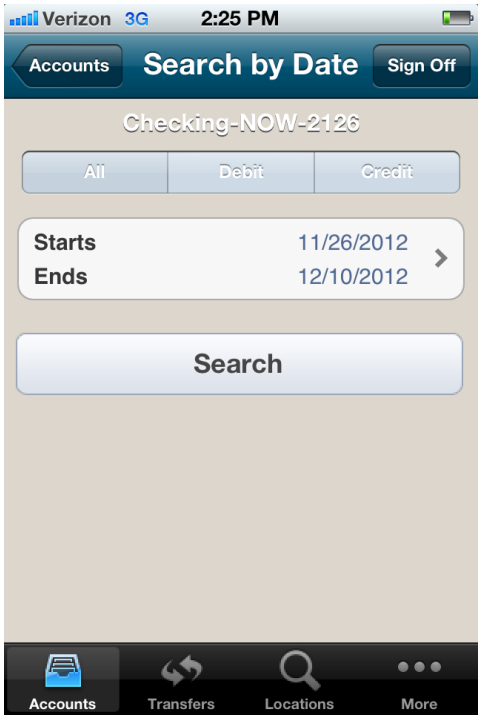
Note: Dates default to current date. Users are typically restricted to a 90-day search history. Check number searches are only available for checking accounts.



Searching by Date

Users can search transactions by date by specifying dates in the START DATE and END DATE fields, selecting the appropriate transaction type radio button (i.e., All, Debit, or Credit), and selecting the **Search** button.

To search for transactions that took place on a specific date, users should enter the same value for Start and End dates.

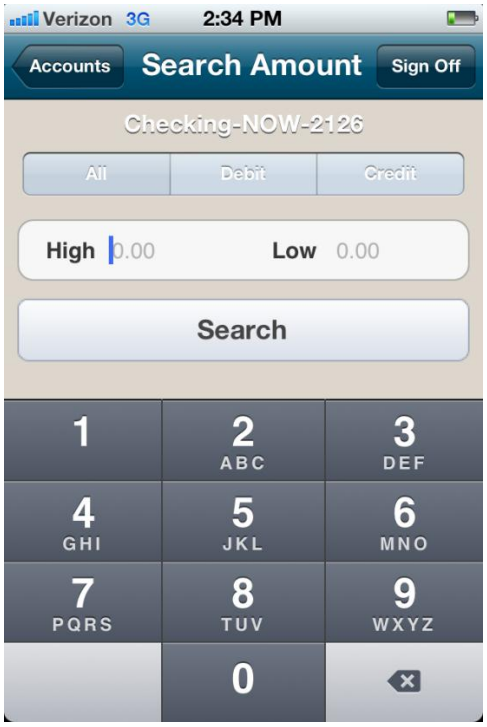


Search by Amount

Users can search transactions by amount by specifying amounts in the LOW AMOUNT and HIGH AMOUNT fields, selecting the appropriate transaction type radio button (i.e., All, Debit, or Credit), and selecting the **Search** button.

To search for transactions that do not exceed a specific amount, only enter a value in the HIGH AMOUNT field. If the LOW AMOUNT field is left empty, it will be set to $0.00 by default.

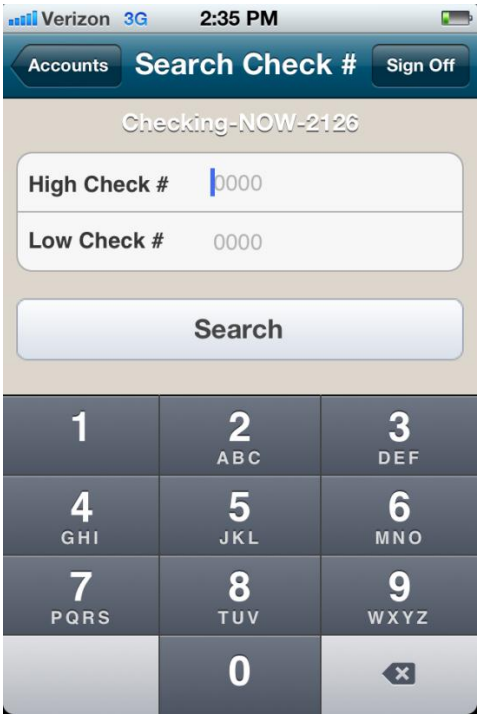
To search for a specific amount, users should enter the same values for both amount fields.



Search by Check Number

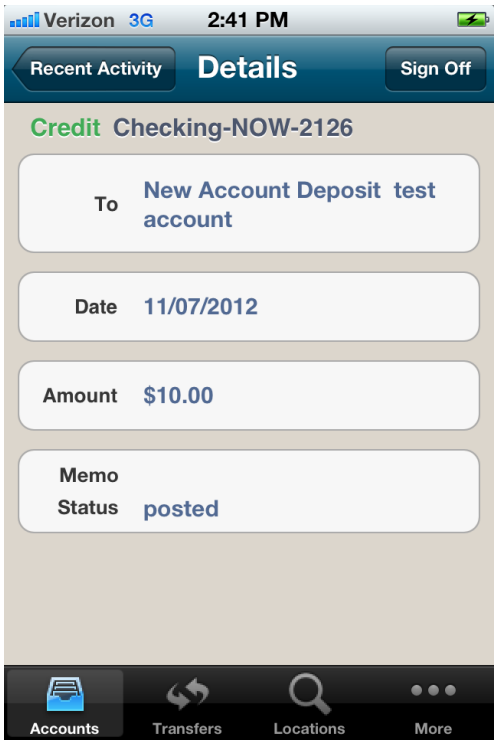
Users can search transactions by check number by specifying check numbers in the LOW CHECK # and HIGH CHECK # fields, and selecting the **Search** button.

To search for a specific check number, users should enter the same values for both check number fields.



Search Results and Details

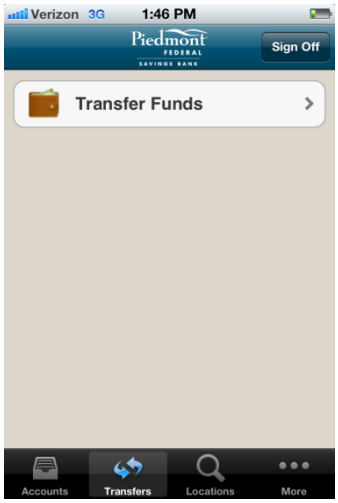
To get more information about a particular transaction listed in the search results, the user should select the corresponding transaction.

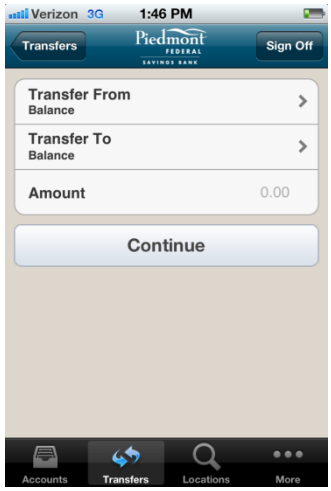


Transfers

Users are able to select the **Transfers** menu button to move money between two accounts. Transfer ability applies to deposit and loan accounts the user has.

Note: Not all accounts allow the movement of money; please review the terms and conditions of your account if you experience any issues while attempting a transfer.

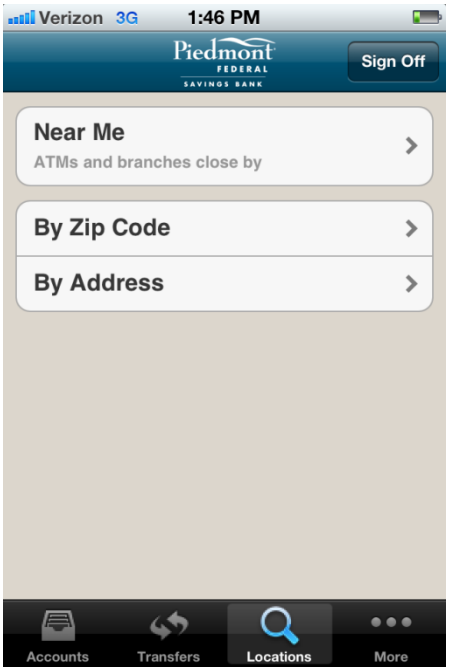




Locations

Users will have the ability to search for locations **Near Me**, **By Zip Code**, and **By Address**.

Users who select **Near Me** will need to Allow PFSBMobile to determine their location through Location Settings on the device.



More

Users who select the **More** option will then be able to choose from **Manage Login Information**, **Help Content**, and **About**.

Users who select **Manage Login Information** will be redirected to the Mobile Banking Center where they can manage their information.

Help Content will instruct and guide users through how to use the various functions available within the application.

About will provide users with information about the mobile banking service provider, as well as the version and build of the application.