



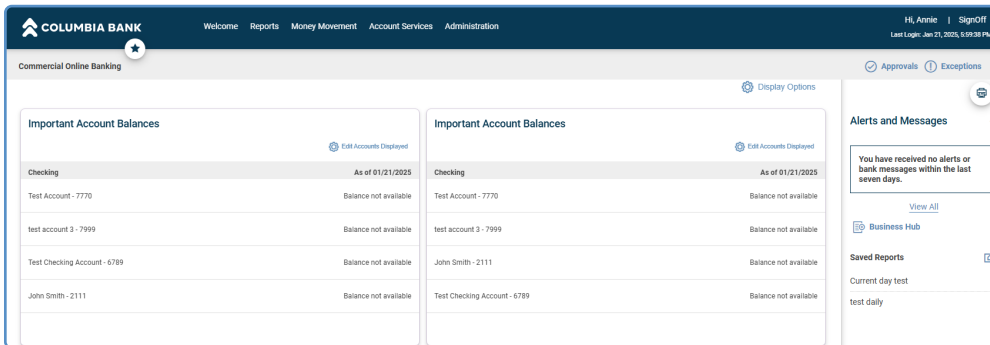
General Navigation User Guide

General Navigation

Get to know your way around Commercial Online Banking. The following will guide you through customizing your dashboard, viewing or sending communications, and accessing support resources.

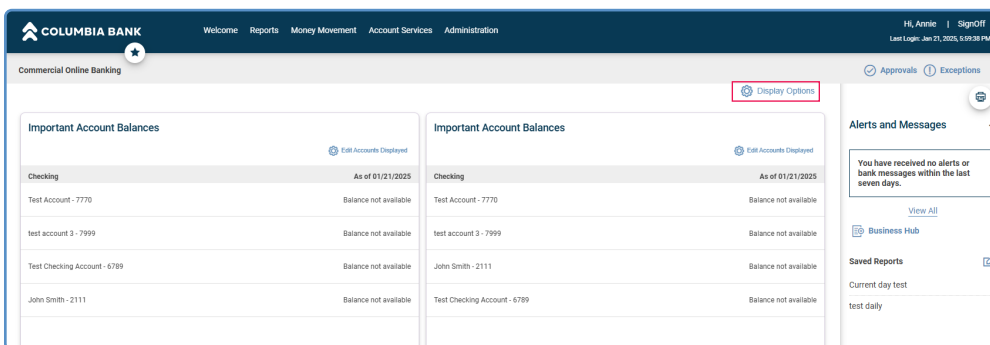
Your Primary Dashboard

On the home screen when you log into Commercial Online Banking, you'll see your primary dashboard. It is packed with valuable information such as account balances, alerts and messages, transfers and payment approvals.



Customizing the display

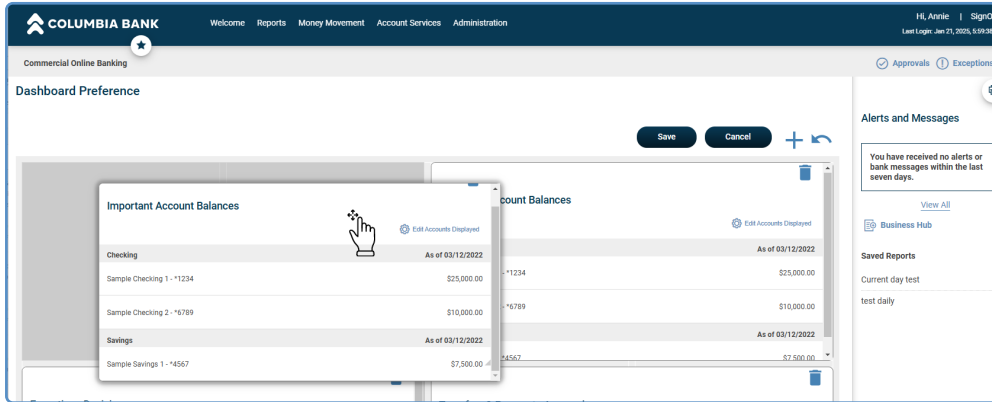
You can add, remove and rearrange elements of your dashboard to create a display that works for your needs. Click on **Display Options** to edit.



 Remove a tile

 Add a tile

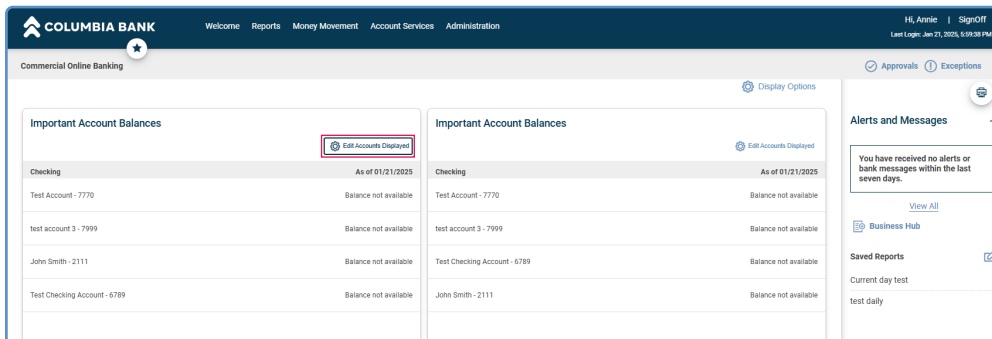
Adjust the location of your tiles by clicking on the preferred tile and dragging it to your desired location. Click **Save** when finished.



Adding accounts to tiles

You can add up to seven of each type of account to your tiles.

1. Select **Edit Accounts Display**.



2. Click on the **Account** drop down.

Edit Accounts Displayed ✕

Checking Loan

Select which accounts you want displayed on the Welcome page. Reorder accounts by dragging each to the desired order location. You may select up to 7 accounts for each account type.

Choose Account

Account

Select All Accounts

Search Account

Select All Accounts

John Smith - *2111

test account 3 - *7999

Test Account - *7770

Test Checking Account - *6789

Order Accounts

- 1 Test Account - *7770
- 2 test account 3 - *7999
- 3 John Smith - *2111
- 4 Test Checking Account - *6789

3. Choose one or all accounts. This can also be done for loans.
4. Click **Save**. A message will appear confirming your save was successful.

Edit Accounts Displayed ✕

Checking Loan

Your changes have been successfully saved.

Select which accounts you want displayed on the Welcome page. Reorder accounts by dragging each to the desired order location. You may select up to 7 accounts for each account type.

Choose Account

Account

John Smith - *2111, test account 3 - *7999, Test Account - *7770

Order Accounts

- 1 John Smith - *2111
- 2 Test Account - *7770
- 3 test account 3 - *7999

Save

Cancel

5. To exit, select either the Cancel button or the **X** in the upper right corner.

Viewing recent transactions














To view up to 25 of the most recent transactions from within the last 30 days for an account, add the **Recent Transactions** tile. While this tile will only display one account's transactions, you can add multiple instances of the tile to your dashboard.

Recent Transactions ⚙ Edit Accounts Displayed

Acct - *

All Transactions

Transactions within last 30 days

CHECK PAID 321791 	01/21/2025	-\$654.57
CHECK PAID 321829 	01/21/2025	-\$1,089.30
CHECK PAID 321867 	01/21/2025	-\$7,286.30
CHECK PAID 321414 	01/21/2025	-\$25,296.00
CHECK PAID 321605 	01/21/2025	-\$159.46
CHECK PAID 321853 	01/21/2025	-\$1,030.00
CHECK PAID 321874 	01/21/2025	-\$4,103.57
CHECK PAID 321827 	01/21/2025	-\$3,007.83
CHECK PAID 321851 	01/21/2025	-\$470.26
CHECK PAID 321897 	01/21/2025	-\$1,524.75
CHECK PAID 321801 	01/21/2025	-\$46.12
CHECK PAID 321536 	01/21/2025	-\$2,134.65
CHECK PAID 321823 	01/21/2025	-\$7,835.89

If you do not want to add the Recent Transactions tile for an account but would still like to be able to view account activity, there are two additional options for viewing.

1. Click on the account you want to review. This opens the account and displays the recent transactions.
2. Select **Reports** from the main menu then **Deposit Account Reporting**. Choose the account you want to review, enter search criteria and click **Search**. The information will display; you will also have the option to export the results.

Viewing account balances

To view your current day balances, add the **Account Balances** tile to your dashboard.

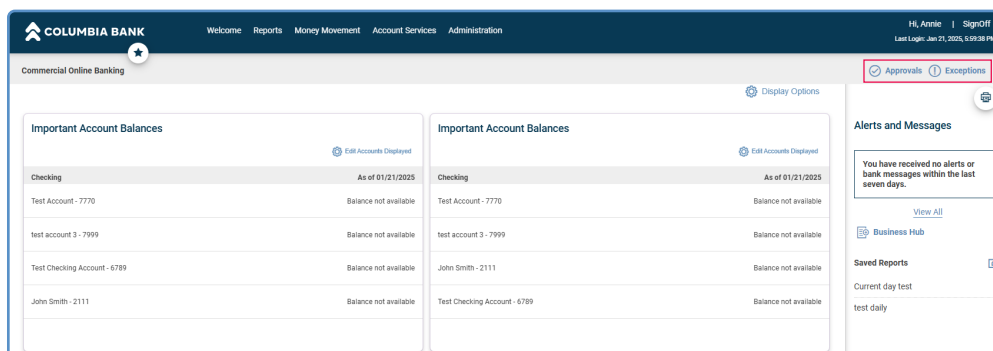
To view a previous day balance timeframe such as previous day end, previous month end or one week ago, utilize the **Balance Snapshot** tile.

Approvals and Exceptions

Approvals: Any payments, templates or other actions that you may need to approve.

Exceptions: Items needing your review and decisioning if you utilize Check Positive Pay.

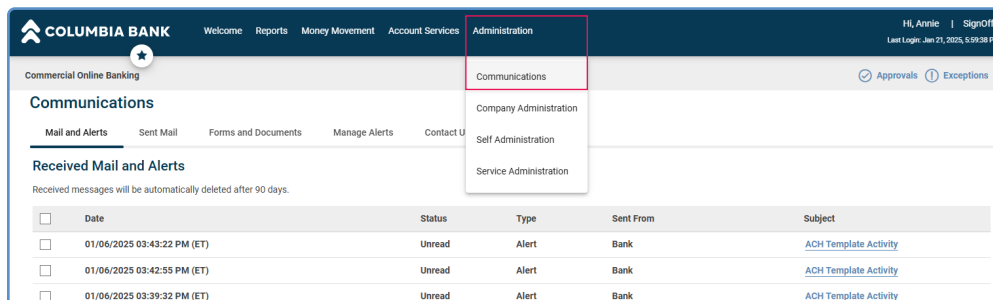
Use the Approvals and Exceptions links in the upper right corner of your dashboard to access these items.



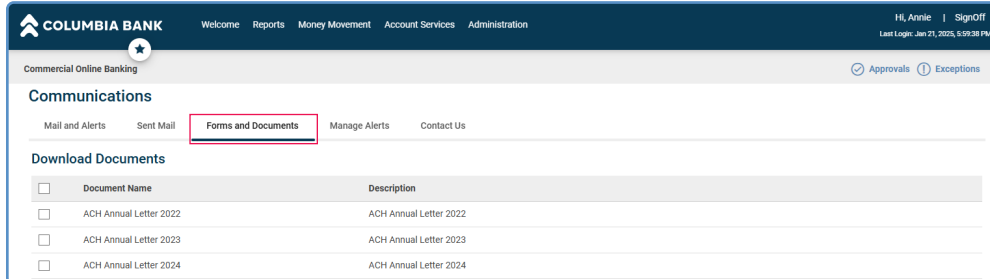
Communications

While working in Commercial Online Banking, you may need to send a message, form or other document to us in a secure format.

1. Click on **Administration** from the main menu.
2. Select **Communication**.



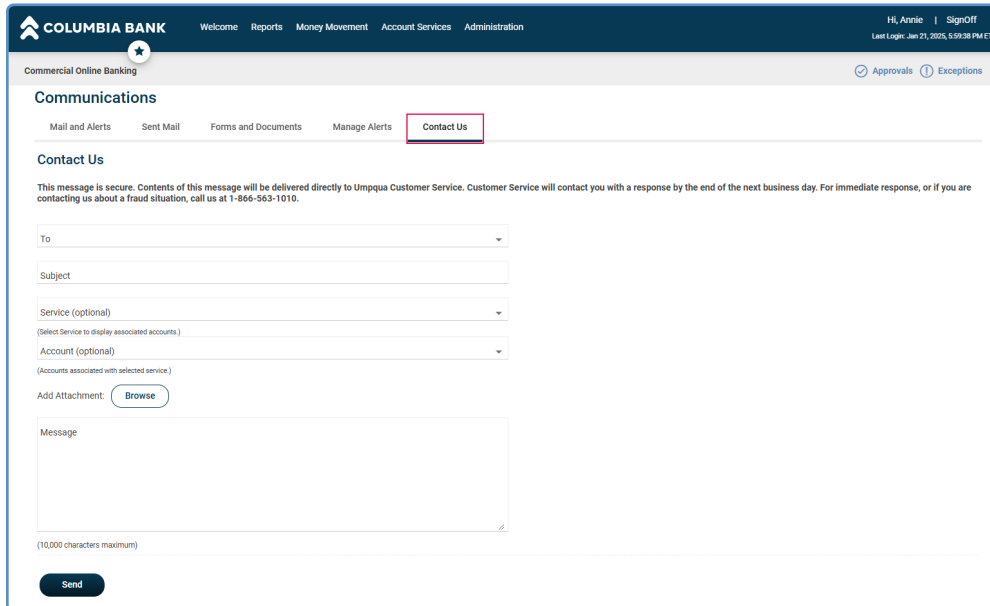
3. Click on **Forms and Documents** to search for a form, user guide or best practice guide.



The screenshot shows the Columbia Bank Commercial Online Banking interface. The top navigation bar includes 'Welcome', 'Reports', 'Money Movement', 'Account Services', and 'Administration'. The user is logged in as 'Hi, Annie' with a 'SignOff' option and a last login timestamp of 'Jan 21, 2025, 5:59:38 PM ET'. The main content area is titled 'Commercial Online Banking' and features a 'Communications' section with tabs for 'Mail and Alerts', 'Sent Mail', 'Forms and Documents' (highlighted with a red box), 'Manage Alerts', and 'Contact Us'. Below the tabs is a 'Download Documents' section with a table listing documents:

<input type="checkbox"/>	Document Name	Description
<input type="checkbox"/>	ACH Annual Letter 2022	ACH Annual Letter 2022
<input type="checkbox"/>	ACH Annual Letter 2023	ACH Annual Letter 2023
<input type="checkbox"/>	ACH Annual Letter 2024	ACH Annual Letter 2024

4. If completing a form that needs to be returned to us, download and complete your form then select **Contact Us** and choose **Bank Mail**.

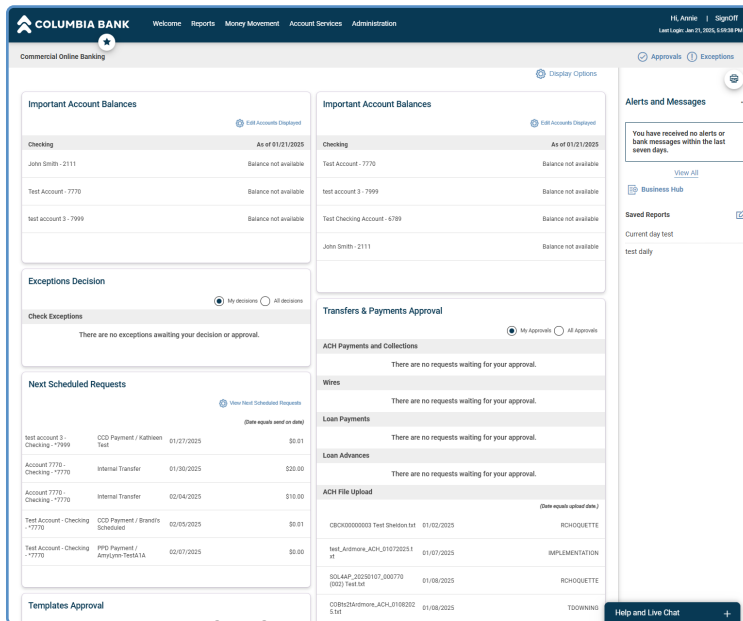


The screenshot shows the Columbia Bank Commercial Online Banking interface with the 'Contact Us' tab selected (highlighted with a red box). The 'Contact Us' section contains a security notice: 'This message is secure. Contents of this message will be delivered directly to Umpqua Customer Service. Customer Service will contact you with a response by the end of the next business day. For immediate response, or if you are contacting us about a fraud situation, call us at 1-866-563-1010.' Below the notice are several input fields: 'To' (a dropdown menu), 'Subject' (a text input field), 'Service (optional)' (a dropdown menu with the instruction '(Select Service to display associated accounts.)'), and 'Account (optional)' (a dropdown menu with the instruction '(Accounts associated with selected service.)'). There is also an 'Add Attachment:' section with a 'Browse' button. A large text area for the 'Message' is provided, with a '(10,000 characters maximum)' limit. A 'Send' button is located at the bottom of the form.

5. Enter your subject, a specific service or account and attach your document. Select **Send**.

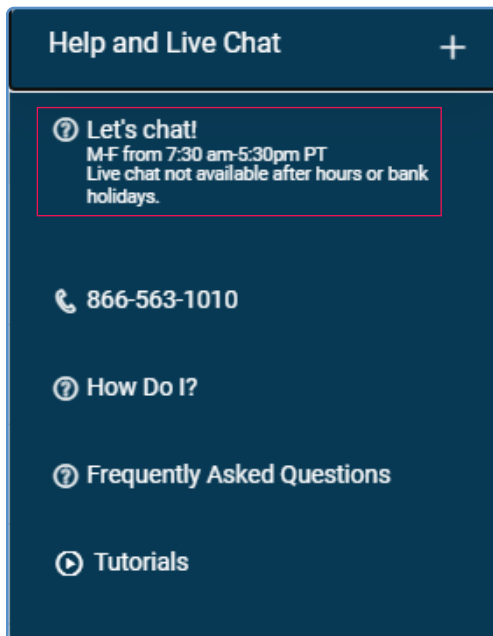
Accessing support resources

If you need assistance while working in Commercial Online Banking, you'll find support options from the **Help and Live Chat** box in the lower right corner.



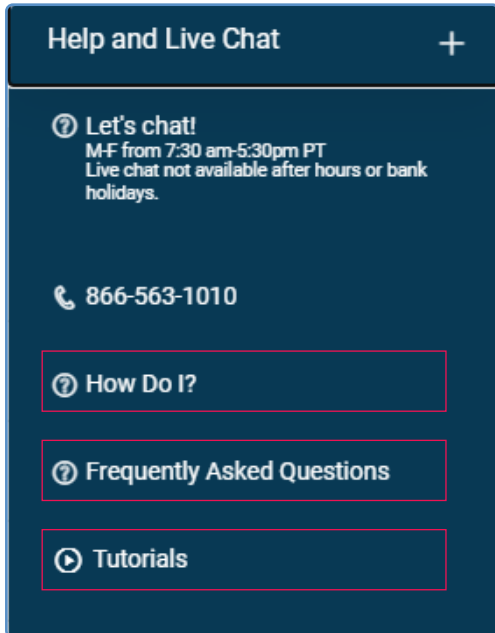
The screenshot displays the Columbia Bank Commercial Online Banking interface. The top navigation bar includes 'COLUMBIA BANK', 'Welcome', 'Reports', 'Money Movement', 'Account Services', and 'Administration'. The main content area is divided into several sections: 'Important Account Balances' (two columns), 'Exceptions Decision', 'Next Scheduled Requests', and 'Templates Approval'. The right sidebar contains 'Alerts and Messages', 'Business Hub', and 'Saved Reports'. A 'Help and Live Chat' button is visible in the bottom right corner of the dashboard.

You can Chat with one of our Treasury Management Support specialists Monday – Friday, 7:30 a.m. – 5:30 p.m. PT.



The 'Help and Live Chat' widget is a dark blue vertical panel. At the top, it says 'Help and Live Chat' with a plus sign. Below this, a red-bordered box contains the text: 'Let's chat! M-F from 7:30 am-5:30pm PT Live chat not available after hours or bank holidays.' Below this box, there are four options: '866-563-1010', 'How Do I?', 'Frequently Asked Questions', and 'Tutorials'.

Click on Help to access the several self-help options available in the forms of how do I, frequently asked questions, and tutorials.



The screenshot shows a dark blue menu titled "Help and Live Chat" with a plus sign icon. Below the title, there is a section for "Let's chat!" with a question mark icon, followed by the text "M-F from 7:30 am-5:30pm PT" and "Live chat not available after hours or bank holidays." Below this is a phone icon and the number "866-563-1010". At the bottom, there are three buttons, each with a question mark icon: "How Do I?", "Frequently Asked Questions", and "Tutorials".