

AOCU 2.0 ONLINE BANKING ACCOUNT AGGREGATION



FOR MORE UPGRADE DETAILS VISIT [MYAOCU.COM/AOCU2](https://myaocu.com/aocu2)

Account Aggregation allows you to import information from accounts you hold at other financial institutions. Aggregation eliminates the hassle of going to multiple sites and juggling multiple passwords every time you want to simply view balances or transactions on accounts at other banks or credit unions. Simply use the aggregation feature and bring all of that information onto your AOCU Online Banking Dashboard. You will need online access to the account you wish to aggregate in Online Banking.

You can link savings, checking and even credit card accounts if you wish. Something to keep in mind is that Aggregation is view only, meaning you will see balance and transaction information, but Aggregation does not allow transactions on those accounts. Please view our guides on Transfers if you wish to do more than view account information.

Log in to Online Banking.

Once on the Dashboard, you will see the "Link External Accounts" widget in the far right column, directly under the Upcoming Transactions ("Next X Days") section.

Click on "Get Started".

ADVANTAGE ONE CREDIT UNION

THE OPEN ROAD IS CALLING, & SO IS YOUR \$100 CASH BACK! [LEARN MORE](#)

Jessica

AUTO LOAN SPECIAL
Drive Away with Cash Back

Dashboard [Help]

Accounts

Account Name	Balance
Checking	\$0.00
My Checking *0805-0200	\$0.00
Savings	\$105.17
PRIMARY SAVINGS *0805-0000	\$100.69
SECONDARY SAVINGS *0805-0009	\$4.48

Available Balance

Next 7 days

- 2 transfers \$4.48
- Logged in 13 times

Next 3 days

- 3 transfers \$42.75

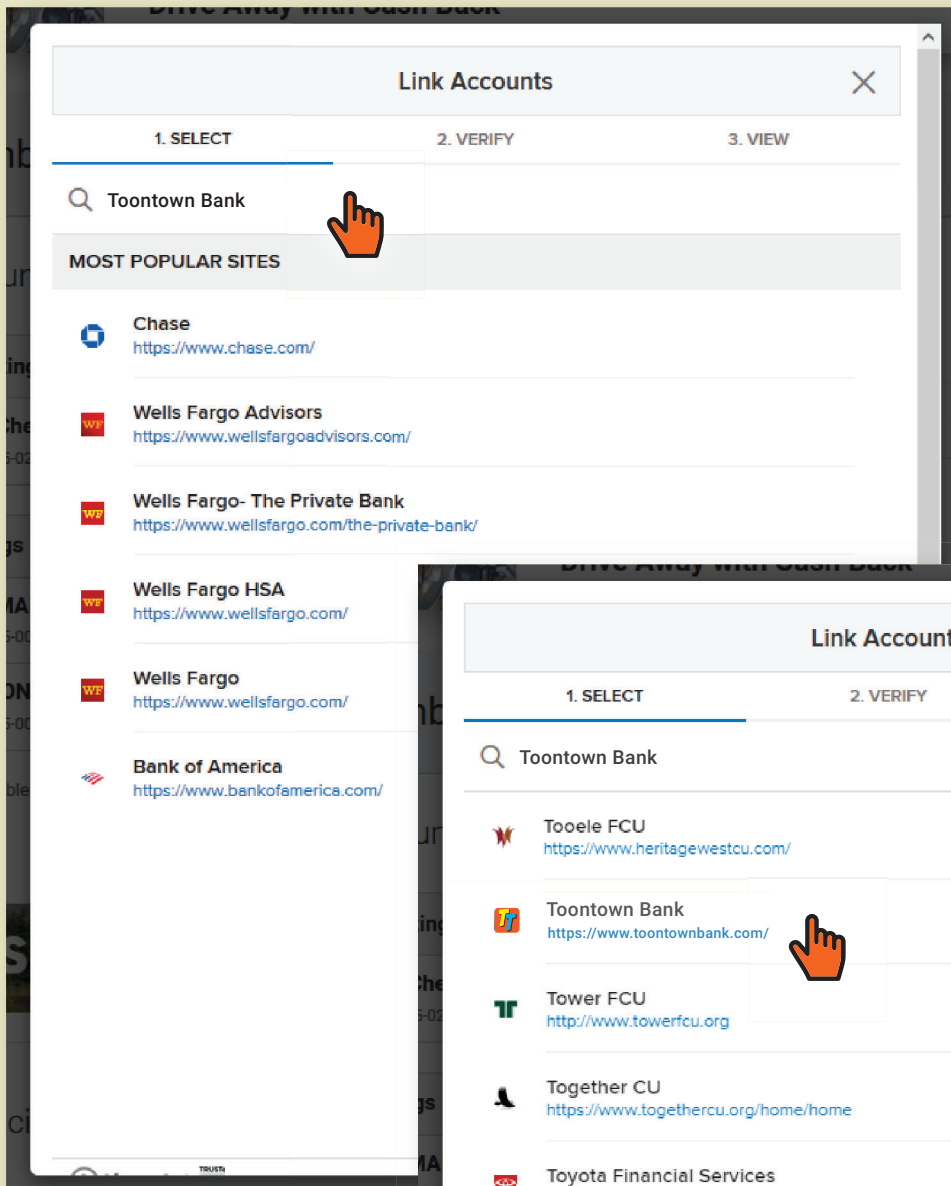
Link External Accounts

Get Started

spruce up your space [Learn More >](#)

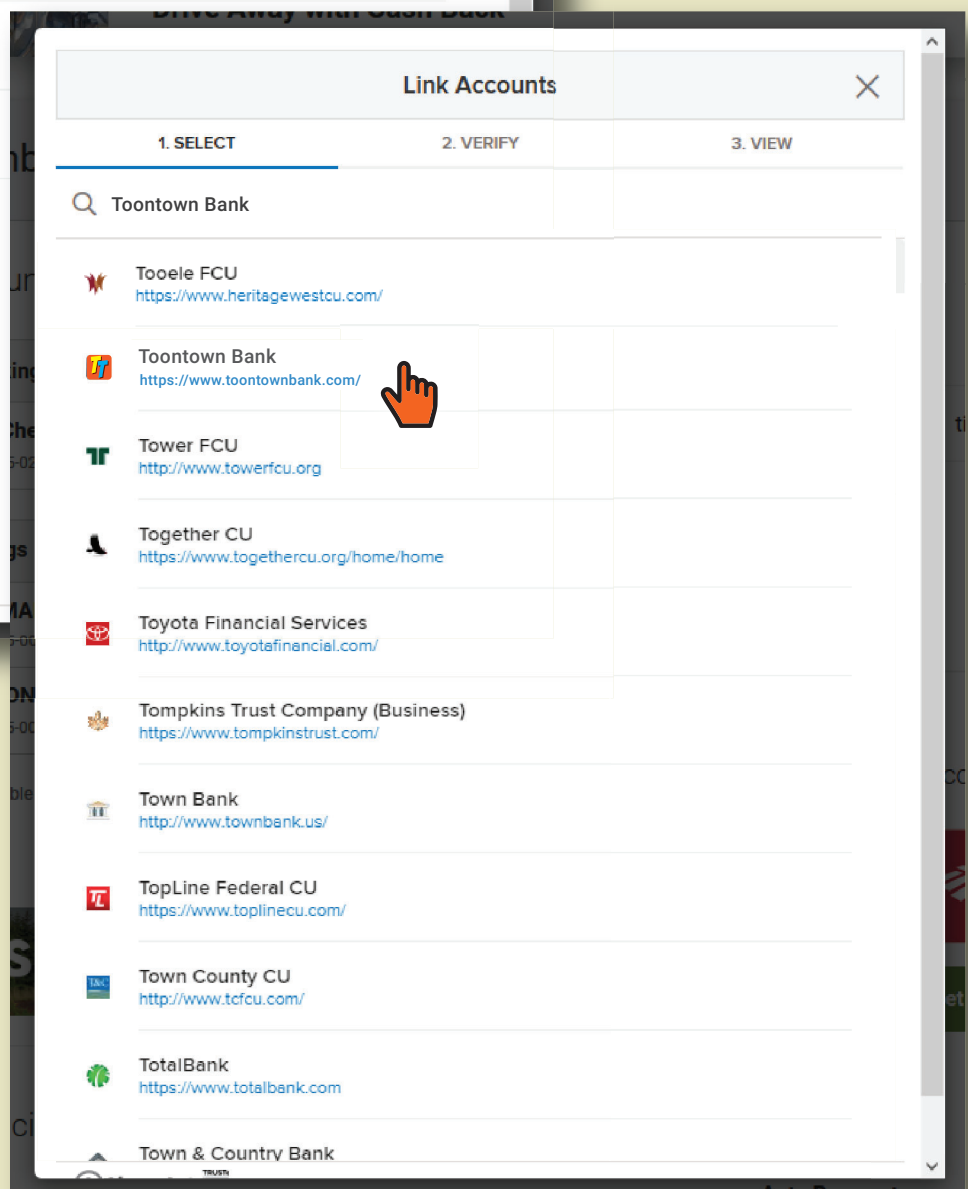
Financial News | Budget Tracker

After clicking “Get Started” you will get a pop-up menu that overlays the Dashboard and allows you to start the linking process. Some popular choices are shown right on the front page before you even search. If the one you are after is not present, simply type the name of the institution you wish to connect and press enter.



Once you’ve found the institution that you’d like to add, click on it to proceed to the next step.

Speaking of steps, the Status Bar at the top of the window will keep track of where you are in the linking process.



After selecting your financial institution (FI) from the list, you'll need to provide the login information from that FI. Click submit when you've entered the correct information for that account. (For the best experience, we recommend that you verify your login name and password for the account in question at that FI's online portal prior to submission.)

Link Accounts

1. SELECT 2. VERIFY 3. VIEW

ToonTown BANK
ToonTown Bank
www.toontownbank.com

Please enter your **ToonTown Bank** online account credentials.

Please enter your username

JessicaRabbit429

Please enter your password

SHOW

Re-enter Please enter your password

Visit your [financial institution's site](#) to retrieve or create your username and password. This will open a new window.

SUBMIT >

By providing your credentials, we verify in real time that you own the account and use this information to establish a secure connection with your financial institution.

thawte

It may take a few moments to connect with the other FI and to verify that your login and password information is correct. During the verification process you will see the screen to the right.

Link Accounts

1. SELECT 2. VERIFY 3. VIEW

ToonTown BANK
ToonTown Bank
www.toontownbank.com

Retrieving Security Information

Once verification has been achieved, you will see the screen below that should reflect the accounts you have at the institution, along with your current balances.

If you'd like to link another account, you can start the process over by clicking "Link Another Site", or you can click on "Close" or the "X" in the upper right corner.

The screenshot shows a modal window titled "Link Accounts" with a close button (X) in the top right corner. Below the title bar, there are three steps: "1. SELECT", "2. VERIFY", and "3. VIEW". The main content area displays the following information:

- ToonTown Bank** (with a green checkmark icon)
- Cash**
- S0001 SAVINGS** (with a gear icon and "Savings | x-0001") and a balance of **\$9,512.21**
- S0020 CHECKING** (with a gear icon and "Checking | x-0020") and a balance of **\$890.00**

At the bottom of the modal, there are two buttons: a blue button labeled "LINK ANOTHER SITE" and a white button labeled "CLOSE".

If you visit your Dashboard or Accounts page, you will now see the external Accounts that you've added. Remember, you can add credit cards as well as savings and checking accounts. This can be very handy when you are reviewing your weekly expenses and trying to refresh your memory regarding an expense.

You'll see current balances and totals as well as individual transactions if you click on the account. Your account totals will also be refreshed every time you open Online Banking. External Account current balances may take a few moments to refresh upon opening and are subject to your other FI's online services being operational. External Account balances also feature "As of " verbiage that show when the balance was last refreshed.

If you'd like to move money between accounts, please check out our guides on Quick, Classic and External Transfers.

The Dashboard page displays a summary of accounts and external accounts. The 'Accounts' section lists:

- Checking: \$0.00 (My Checking: \$0.00)
- Savings: \$105.17 (PRIMARY SAVINGS: \$100.69, SECONDARY SAVINGS: \$4.48)
- External Accounts: \$3,602.21 (S0001 SAVINGS: \$9,512.21 As of 11 Jun 2020, S0020 CHECKING: \$890.00 As of 11 Jun 2020)

 The 'Last 7 days' summary shows 2 transfers for \$4.48 and 13 logins. The 'Next 3 days' summary shows 3 transfers for \$42.75. A 'Link External Accounts' section features logos for Wells Fargo, Chase, Bank of America, and others, with a 'Get Started' button.

The Accounts page provides a detailed view of the 'My Checking' account. The account summary shows a current balance of \$0.00 and an available balance of \$0.00. The 'Transactions' section includes a search bar and a table of recent activity:

DATE	DESCRIPTION	AMOUNT	BALANCE
JUN 1 2020	To Share 0000 Add a category	-\$100.00	\$0.00
JUN 1 2020	From Share 0000 Add a category	\$5.96	\$100.00
MAY 28 2020	Deposit Home Ban MYBRANCH TELLER CU NB SETUP Add a category	\$1.00	\$94.04
MAY 22 2020	From Share 0000 Add a category	\$4.56	\$339.24

 The left sidebar shows a list of all accounts, including external accounts with their respective balances and 'As of' dates.