

# How to update your contact information in Online Banking

After logging on to Online Banking, click the **My Profile** tab on the far right side of the page.

The screenshot shows the Surrey Bank & Trust online banking interface. The top navigation bar includes the bank logo, an ATM Locations link, and a menu with tabs for Account Summary, Transfers & Pmts, Bill Payment, Other Services, and My Profile. The My Profile tab is circled in yellow. Below the navigation bar, there are links for Change (Password, Account Alias, PassMark, Profile Info, Quick Links) and View (Fees, Activity). The main content area is titled 'Account Summary' and includes a 'Show Account Detail' dropdown menu with options like Item Correction, Export File, Request Report, Upcoming Transactions, View Statements, and Account Alerts. A welcome message for a demo customer is displayed, along with a 'Quick Links' section for viewing statements. Two tables are shown: 'Deposit Accounts' and 'Certificates of Deposit and IRAs'.

Account	Current Balance	Available Balance	As of Date
<a href="#">DEMO_DDAxxxxx1111</a>	\$1,231.12	\$1,120.32	12/9/2009
<a href="#">DEMO_DDAxxxxx2222</a>	\$9,810.10	\$9,810.10	12/9/2009
<a href="#">DEMO_DDAxxxxx4444</a>	\$5,890.05	\$5,490.07	12/9/2009
<a href="#">DEMO_MMAxxxxx3333</a>	\$4,997.25	\$4,997.25	12/9/2009
<a href="#">DEMO_SAVxxxxx5555</a>	\$9,997.25	\$9,997.25	12/9/2009
<b>Totals</b>	<b>\$31,925.77</b>	<b>\$31,414.99</b>	

  

Account	Current Balance	Maturity Date	As of Date
<a href="#">DEMO_CDAxxxxx7777</a>	\$5,000.00	1/1/2010	12/9/2009
<a href="#">DEMO_IRAxxxxx6666</a>	\$9,872.12	1/1/2010	12/9/2009
<b>Totals</b>	<b>\$14,872.12</b>		

The screenshot shows the Surrey Bank & Trust online banking interface with the 'User Information' page selected. The 'My Profile' tab is active, and the 'Change Profile Information' link in the 'My Profile' menu is circled in yellow. The main content area is titled 'User Information' and includes a 'The Setup section allows you to change various personal configurations...' message. Personal information is displayed, including First Name, Last Name, Last Access Date/Time, Address, City, State, Country, Zip, Fax Number, Home Phone Number, Work Phone Number, Cell Phone Number, and E-mail Address.

**User Information**

The Setup section allows you to change various personal configurations. Some of the information listed below can be changed using the options listed above.

First Name: Demo  
 Last Name: Customer  
 Last Access Date/Time: 12/9/2009 11:47:33 AM  
 Address: 123 ABC Street  
 PO BOX 123  
 City: Anytown  
 State: FL  
 Country: USA  
 Zip: 12345  
 Fax Number: 123-456-7890  
 Home Phone Number: 123-456-7890  
 Work Phone Number: 123-456-7890  
 Cell Phone Number: 123-456-7890  
 E-mail Address:

Review the information on the **User Information** page, being sure to double-check for typos.

If your information is correct, simply click on another tab to start your Online Banking session, or click **Exit** to leave Online Banking.

If your information is **not** correct, click the **Change Profile Information** link on the left side of the page.



My Profile

- Change Password
- Change Account Alias
- Change PassMark
- Change Profile Information
- Change Quick Links
- About Our Fees
- Activity Log

Welcome  
Demo Customer  
Last Login Date  
12/9/2009 11:25:43 AM EST

Quick Links

- View Statements
- View Statements
- View Statements
- View Statements

### Change Profile Information

First Name: Demo

Last Name: Customer

Last Access Date/Time: 12/9/2009 11:47:33 AM

Address 1: 123 ABC Street

Address 2: PO BOX 123

City: Anytown

State: FLORIDA

Country: UNITED STATES

Zip: 12345

Fax Number: 123-456-7890

Home Phone Number: 123-456-7890

Work Phone Number: 123-456-7890

Cell Phone Number: 123-456-7890

E-mail Address:

Re-enter E-mail

Address:

Secure Message Notification:  True  False

Personal Data 1:

Personal Data 2:

Cancel

Reset to Defaults

Proceed



Make the desired changes and click **Proceed**.



My Profile

- Change Password
- Change Account Alias
- Change PassMark
- Change Profile Information
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- About Our Fees
- Activity Log

Welcome  
Demo Customer  
Last Login Date  
12/9/2009 11:25:43 AM EST

Quick Links

- View Statements
- View Statements
- View Statements
- View Statements

## Change Profile Information

Verify that the data shown below is correct. After you have checked the information, press the 'Complete' button at the bottom of the page to submit your request and go to a confirmation page. The 'Cancel' button will send you to 'User Info', while the 'Back' button will send you to the previous page.

First Name: Demo

Last Name: Customer

Last Access Date/Time: 12/9/2009 11:47:33 AM

Address 1: 123 ABC Street

Address 2: PO BOX 123

City: Anytown

State: FL

Country: USA

Zip: 12345

Fax Number: 123-456-7890

Home Phone Number: 123-456-7890

Work Phone Number: 123-456-7890

Cell Phone Number: 123-456-7890

E-mail Address: none@none.com

Secure Message Notification: False

Personal Data 1:

Personal Data 2:

Cancel

Back

Complete



Review your changes. If you need to make a correction, click **Back** to return to the **Change Profile Information** page. Make your changes and click **Proceed**, as described on the previous page.

If your changes are correct, click **Complete**. A page will display showing that your changes have been accepted. You may then click another tab to continue using Online Banking or click **Exit** to end your Online Banking session.