Mobile Banking App Features

- View account transactions, balances and history

- Track weekly spending

- Transfer funds within your accounts or to other Trius members

- Pay bills

- Make loan and credit card payments

- Deposit a check via remote deposit

- View e-statements and e-notices

- Add account alerts

- Apply for a loan

- Locate the nearest branch or Shared Branching location

- Send a secure message to a Trius representative

- Plus much more!

New Mobile App

First, install the Trius app on your phone or device. The app is available for smartphones and other mobile devices. The mobile icon will look like this.

You can find the new app in the App Store or Google Play simply search Trius Federal Credit Union. Once located, install the new app.

You will use the same credentials for both mobile and online banking. If you have already enrolled continue by adding your username and password into the app. If not, please see the instructions for mobile enrollment.
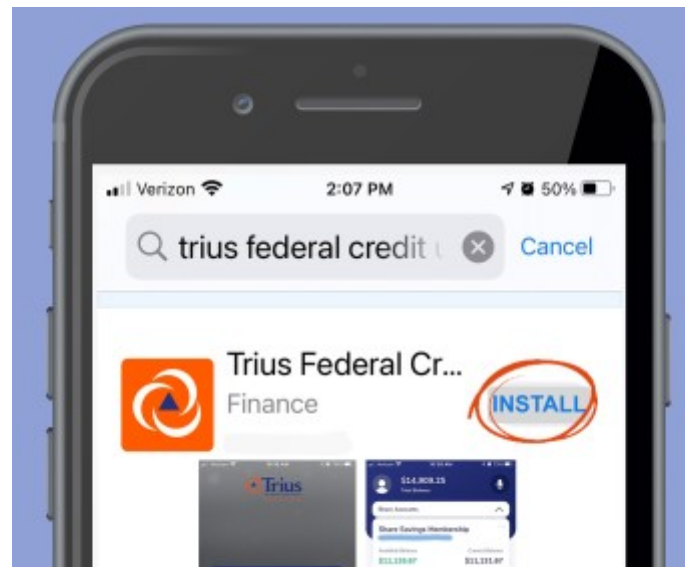
Account Dashboard: Once you log in, you will be taken to the dashboard screen. It includes a summary of all your accounts. Each account is displayed in a list format. Click on the account and details and history will display.

Member Profile icon: View your personal profile information and update your email, phone number, address, and change your password. You will receive an email to verify any changes you make. You may also add a profile photo. Be sure to add your cell phone number to acti-vate the text message alert option.

Total Account Balance (not clickable)

Chatbot icon: You can use this feature to type in a basic request from the chatbot/digital assis-tant. Once clicked, a message box will appear. You may type your request in the text box and the chatbot can assist with requests such as looking up balances or transactions, money transfers, setting up payments, and more.

Accounts: Use this icon to go back to the dashboard screen for a complete listing of all your accounts.

My Finance icon: View and manage, loan and credit card payments, schedule transfers, ac-count transaction history, other Trius contacts, bill payments and payees.

Plus Sign: If clicked, a menu with several icons appear - remote deposit, apply for a loan, transfer money, pay bills, and add alerts.

Cards icon: You can view your credit card. Click on manage cards and be taken to the **ecad** portal to manage your Trius Platinum Visa credit card.
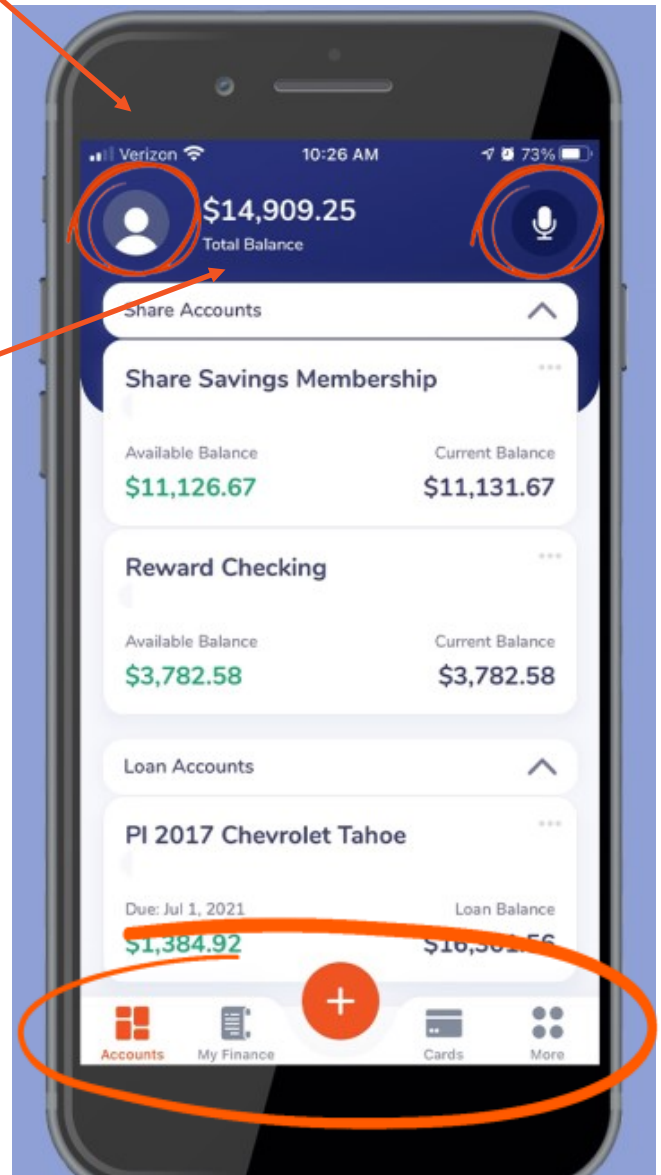

More dots: If clicked, a drop-down menu with more features and options will appear. Add alerts, app settings, statements, pay loan from another fi-nancial institution, secure messages, lo-cations, routing number, contact us, le-gal and privacy documentation and frequently asked questions.

Dashboard Customization: Scroll to the very bottom of the dashboard until you find the customize dashboard box. Click on the box, next click on create a group, then select the accounts and name your group. The next time you login your selected accounts will be grouped together for faster viewing. On this screen you can also hide and unhide an account by swiping left. Any customization you make using mobile banking will transfer to online banking as well.
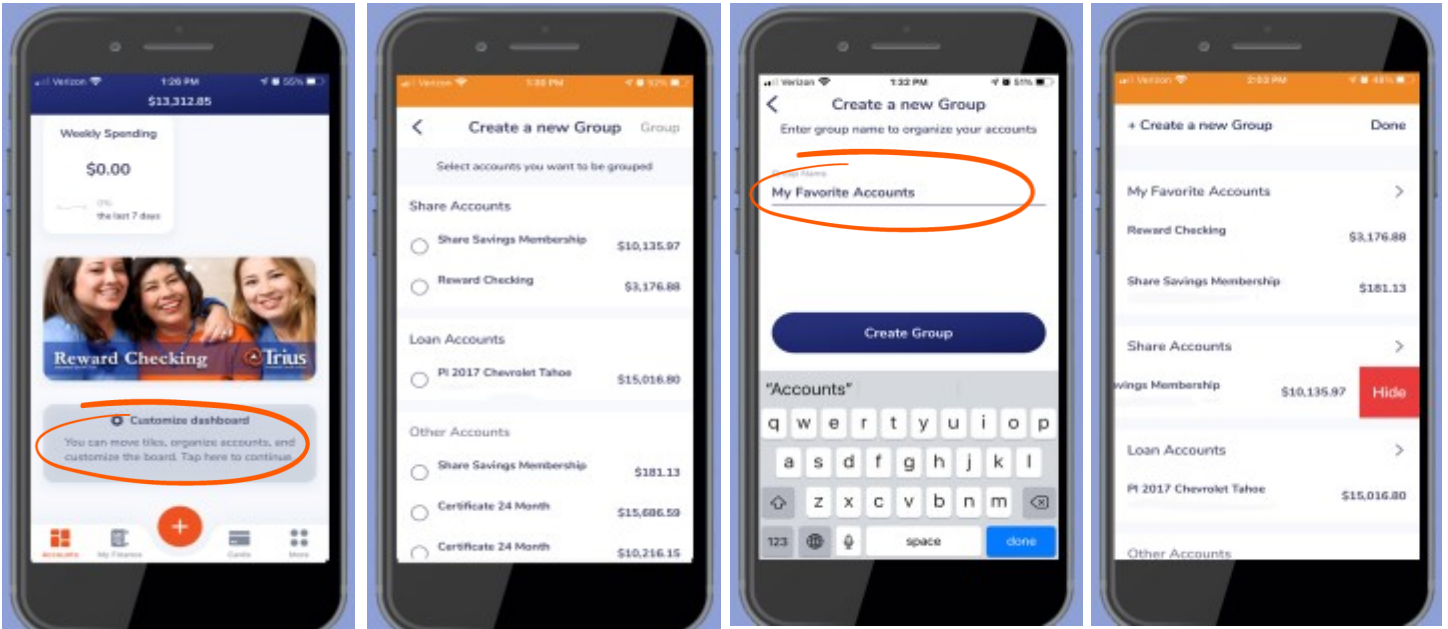

Microphone icon: Select the mic icon and you activate the digital assistant Joy. Joy can help with basic information such as balances, transactions, and other account information. Simply type or ask your question.
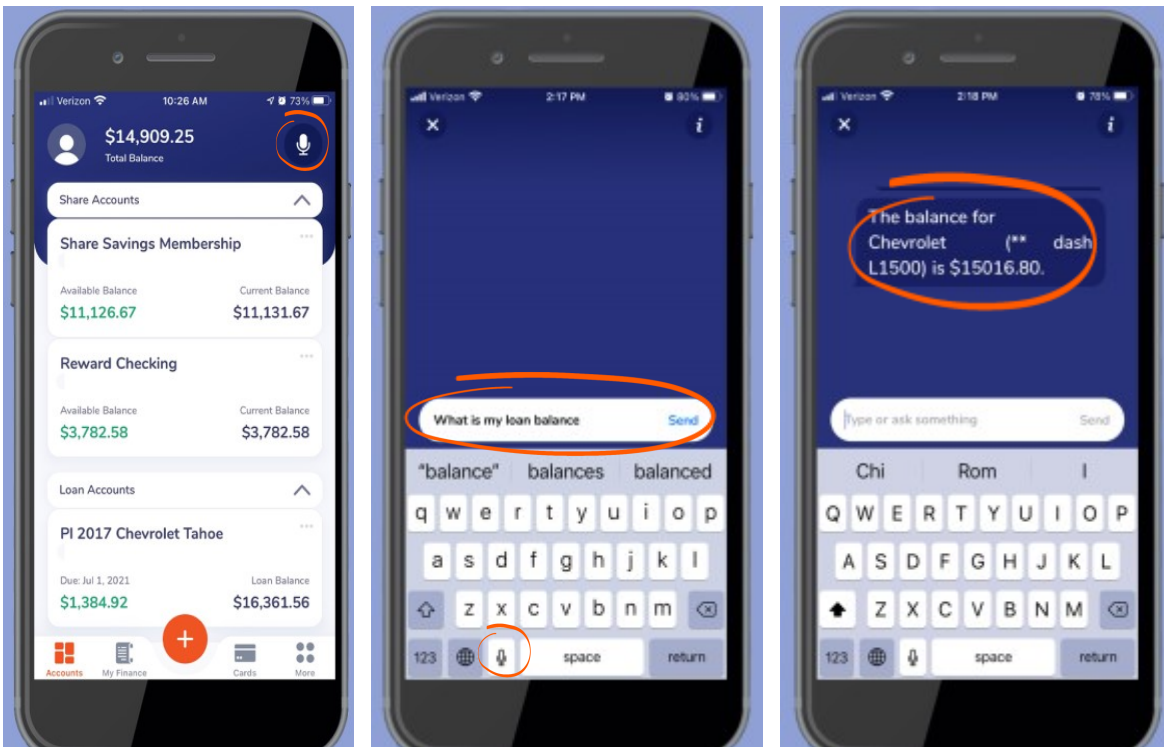
Dashboard Additional Features:

To access account details and history on individual accounts, click the account you would like to view.

Once you click on the account, you will be taken to a screen that includes account history, pending transactions, balance information, and a spending trend graphic.
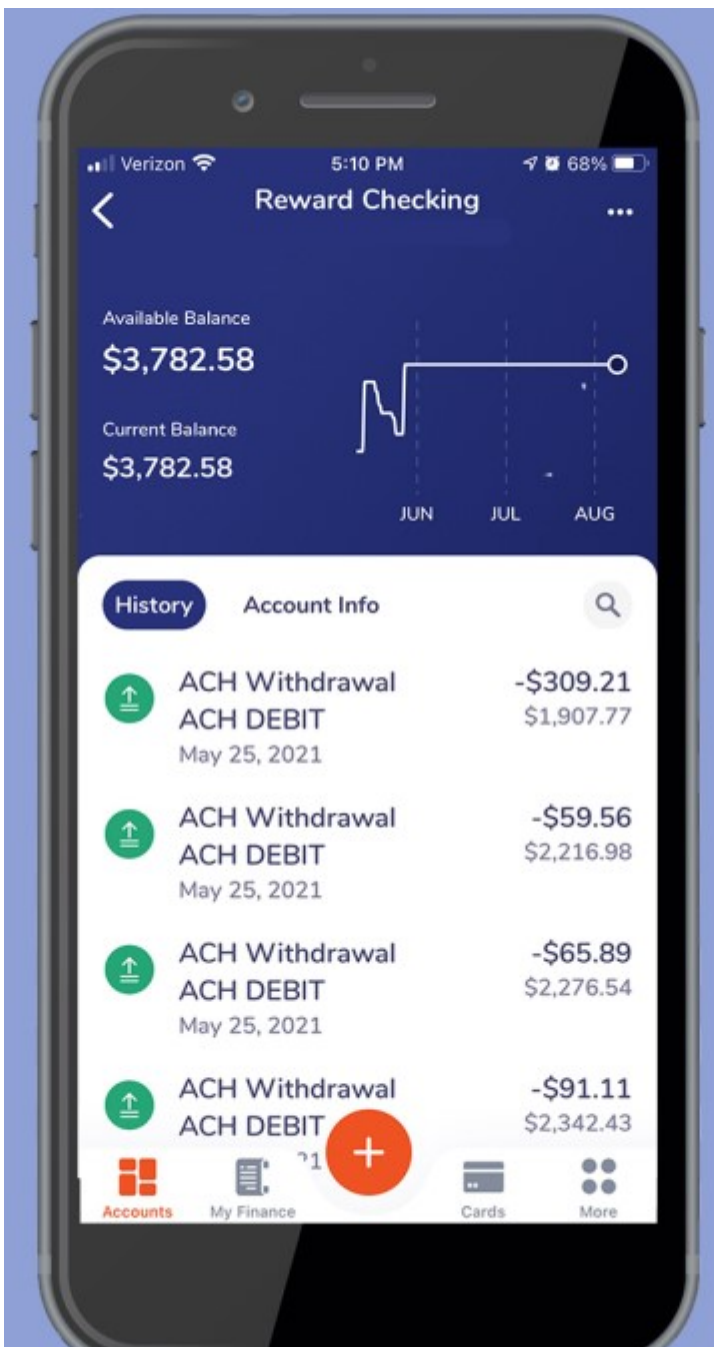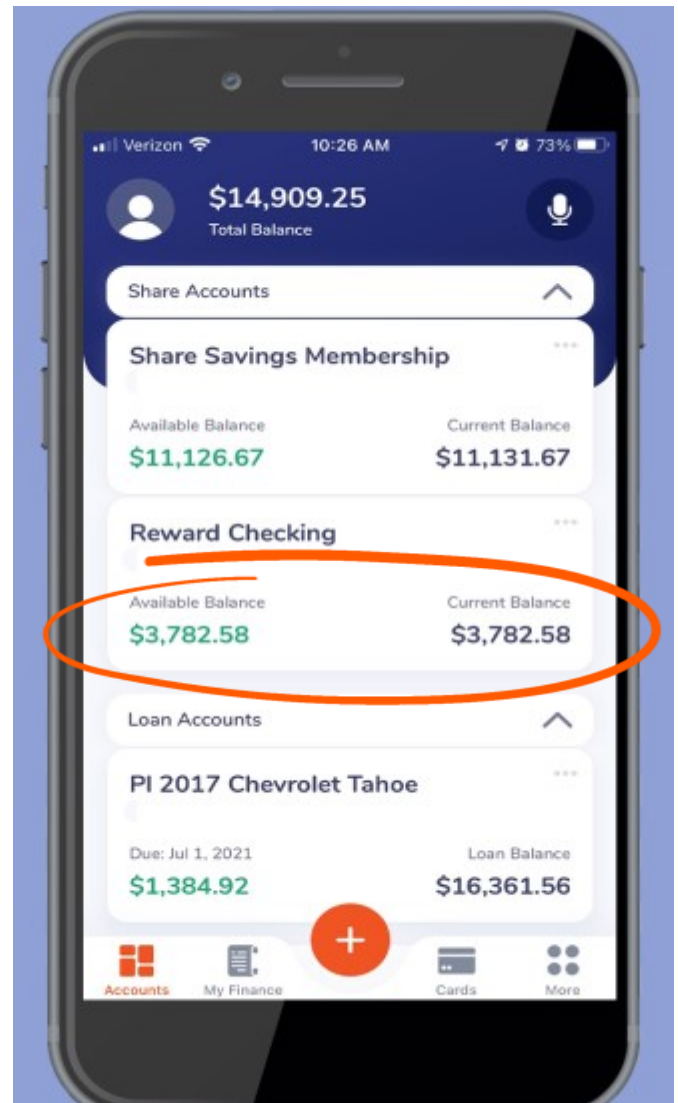
Dashboard Additional Features:

Member Profile icon: Click on the member profile icon to update your profile information. When you make any changes to your profile information you will receive an email or text alerting you to the changes.
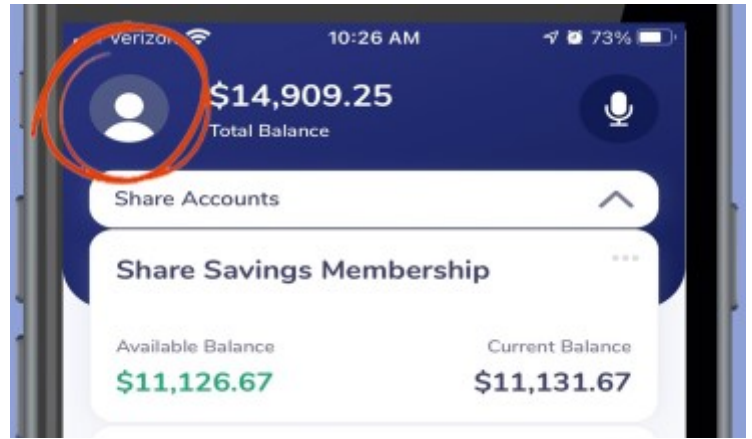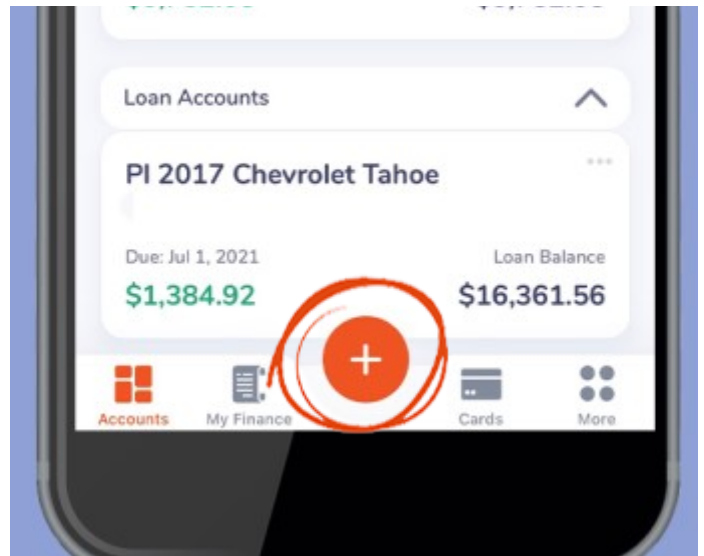

Click edit to update your email, phone numbers, and address. Be sure to add your cell phone number to your profile to activate the text message option for alerts and Multi-Factor Authentication.

You may also upload your photo to your profile. Click the camera icon.
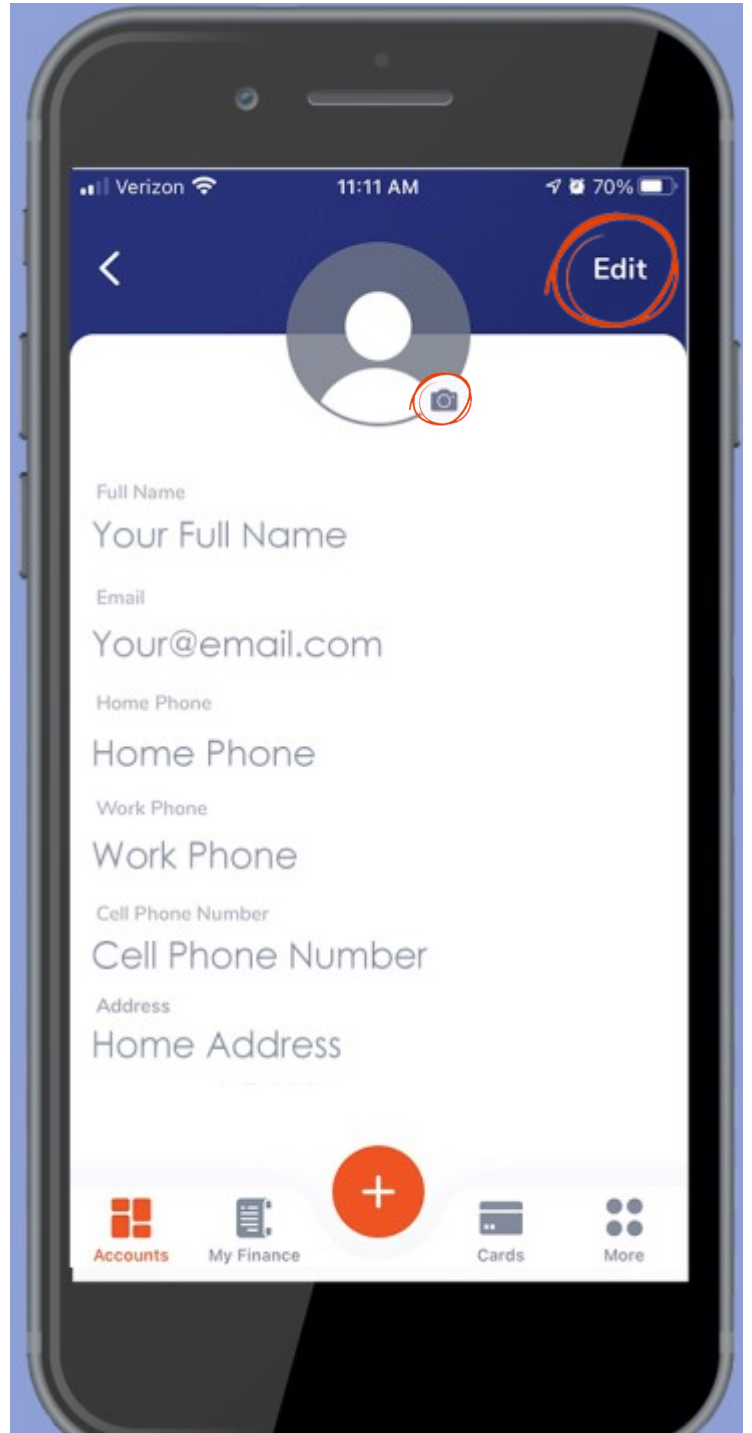
Bottom Screen Menu:

Click on the orange **Plus Sign icon** to open the additional app features.

Remote Deposit icon: Here you are able to deposit a check remotely by taking a photo of the front and back of your check. Be sure to follow all the instructions to successfully complete the transaction.

Transfer Money icon: Transfer funds within your accounts or to other Trius member accounts.

Create Share icon: Click here and open a new share account.

Add Alerts icon: Here you are able to add alerts to your accounts or debit cards. Click the icon and select the account. Then pick from a variety of standard alert messages applicable to your different accounts types.

Apply for a Loan icon: Apply for your next loan using the Trius mobile loan application. Click the apply for loan icon.

Pay Bill icon: This icon will take you to the Trius online bill payment system.

X icon: This icon closes the current menu and takes you back to the dashboard screen.
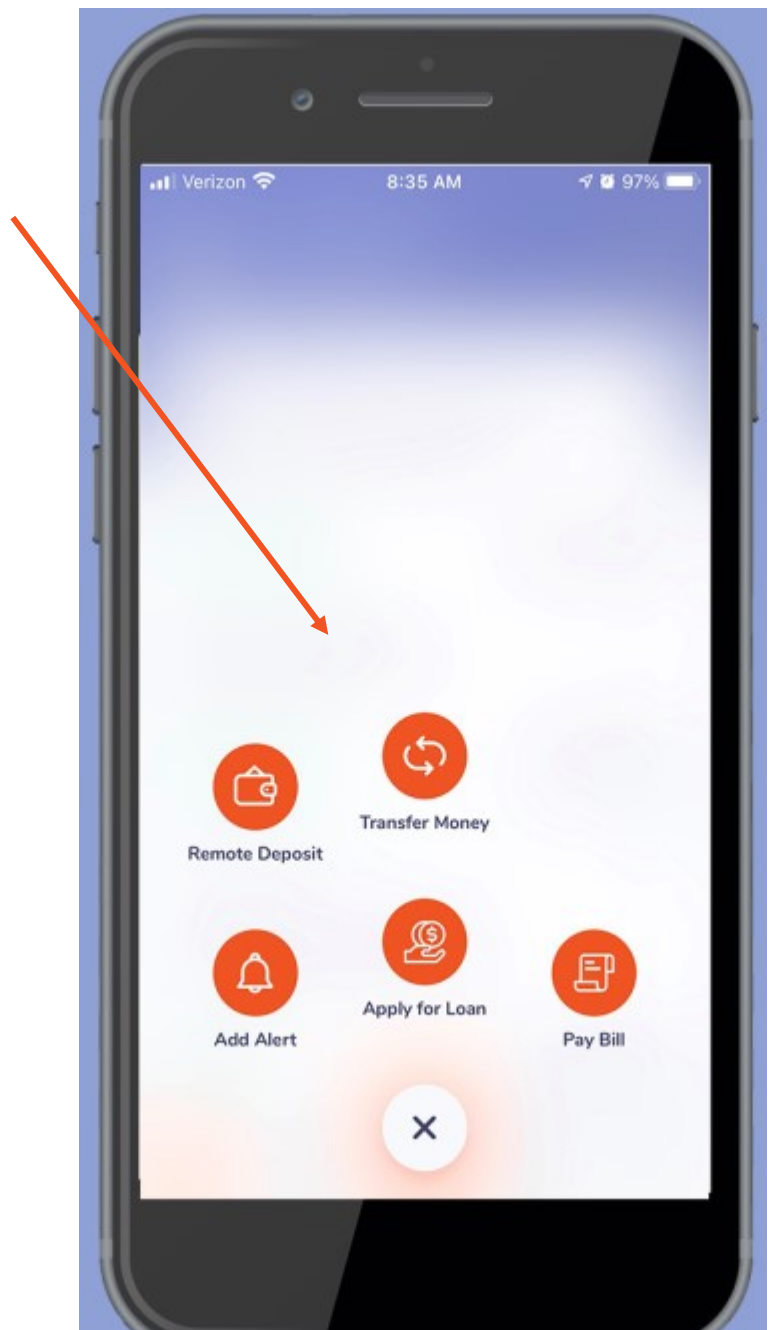
Remote Deposit Instructions: Select the remote deposit icon and you will have the option to view pending, rejected, and posted remote deposits. Select the deposit check button and begin the process to remotely deposit a check.
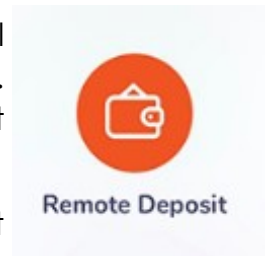

Remote Deposit

Deposit a check: First, select the account you want to make the deposit to. Be sure to read, follow and check the boxes next to each of the remote deposit guidelines.

☑ The amount of the check should be $3,000 or less. If the check amount is higher, please send a secure message in online/mobile banking to request an increase in your daily deposit limit.

☑ The payable to name should match a name listed on your account.

☑ The date of the check should not be older than 180 days.

☑ Deposits made through mobile banking will be subject to holds at our discretion and are not subject to our funds availability policy. You are responsible for verifying the status of a mobile deposit after you have made the deposit and before using the funds.

☑ Place the check on a flat surface with a dark background for best results. Then snap the photo.

Next follow the endorsement guidelines and check each box to continue.

☑Your signature.

☑For remote deposit with Trius Federal Credit Union.

☑Your account number. Take the photo.

Next enter the amount of the check and click continue. On the next screen review the information you have entered. If your check photo does not meet the requirements you will be alerted to retake the photo. Once complete, click confirm. It is important to securely store your check for at least 60 days after your deposit.
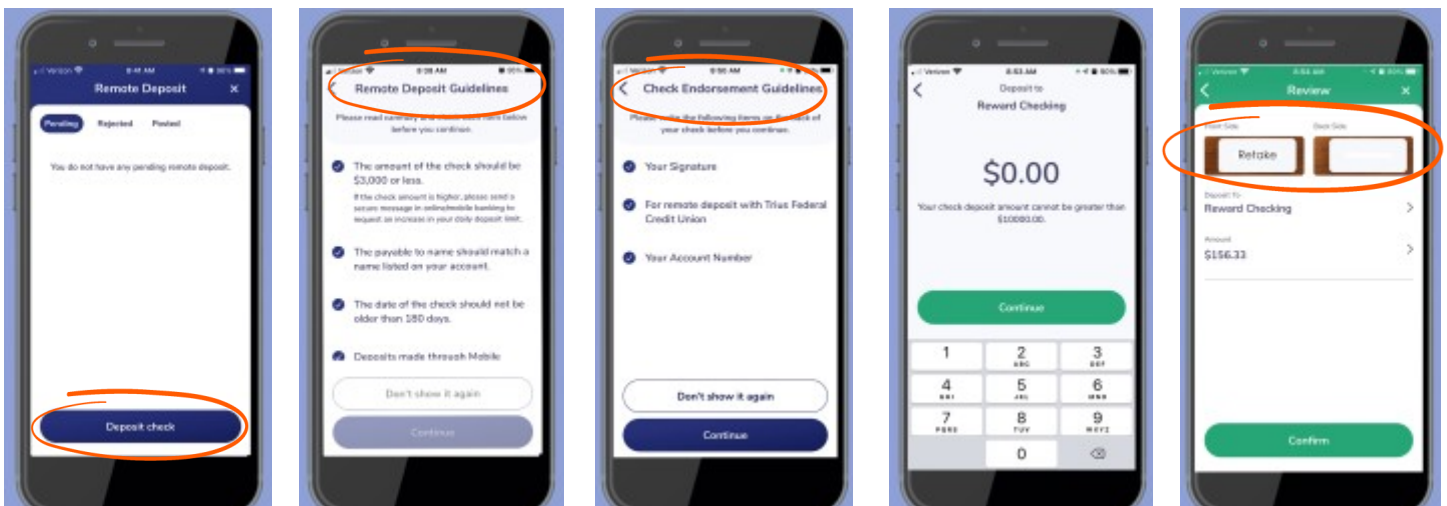
Transfer Money icon: Select the **transfer money** icon

Transfer Money

from the menu screen. Now you can transfer money between your accounts at Trius or to other Trius member accounts. The first screen will prompt you to select the account you would like to send the money **from**.
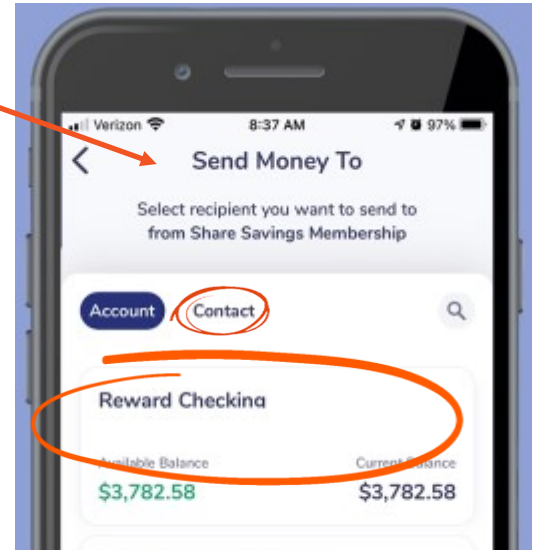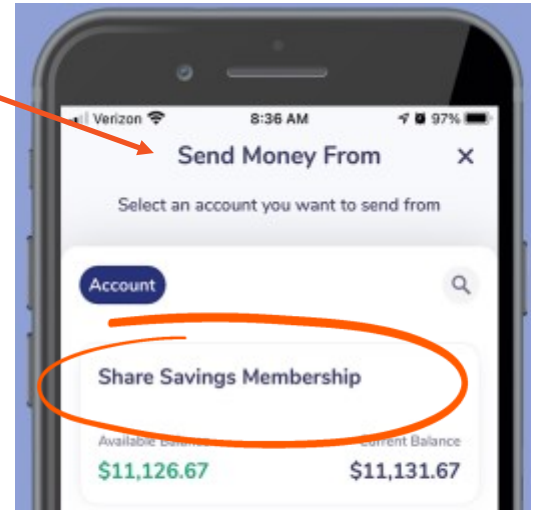

Once your select the account you would like to transfer from, you will be taken to the next screen to select the account or contact you want to transfer the money **to**. Select from the accounts listed. Next a confirmation screen will appear for you to review your transfer information. Once reviewed, click continue to complete the transfer.

Transfer Money to a Contact: You have the option to transfer funds to other Trius member accounts. To complete this transaction, first you must add them as a contact. Select **contact** on the **send money to** screen.


Next you will be prompted to enter the name and email or mobile number of the contact you want to add.
Then click **send invite**.

The Trius member will receive an email or text with your message. Your contact must click the link and follow the prompts in order to be added as a contact on your account. Currently this option is only available to Trius members. Enhancements to this option may be made in future releases.
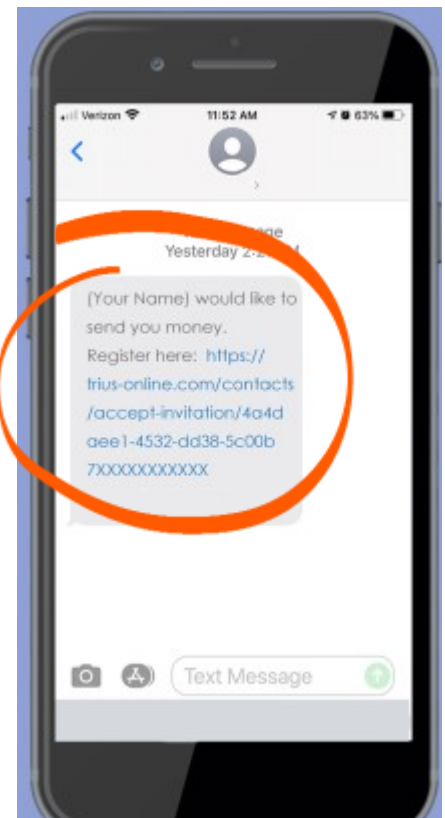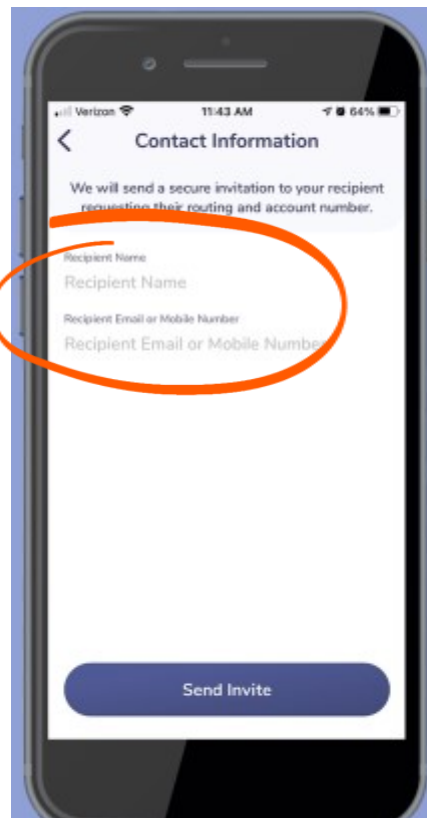
Add Alerts icon: You can add alerts to any of your accounts or to your debit card from the add alerts icon. Once selected, a screen of accounts will appear. Click on the account (or click on the cards button to select your debit card account), to setup an alert. Follow the instructions, choose your preferred notification (email or text) and then click save.
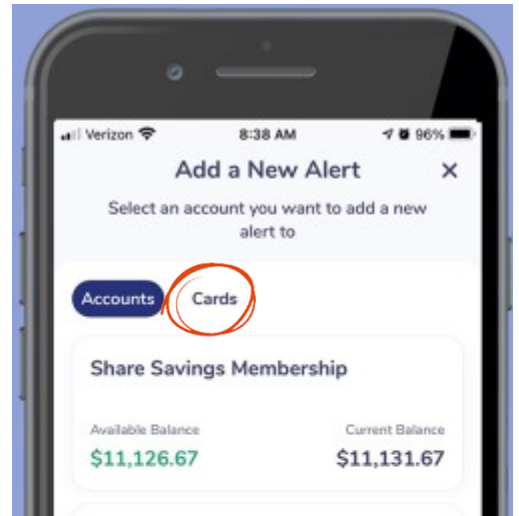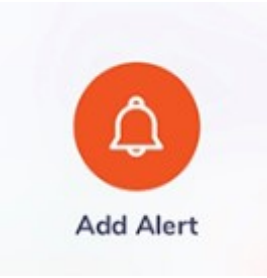
Available Alerts
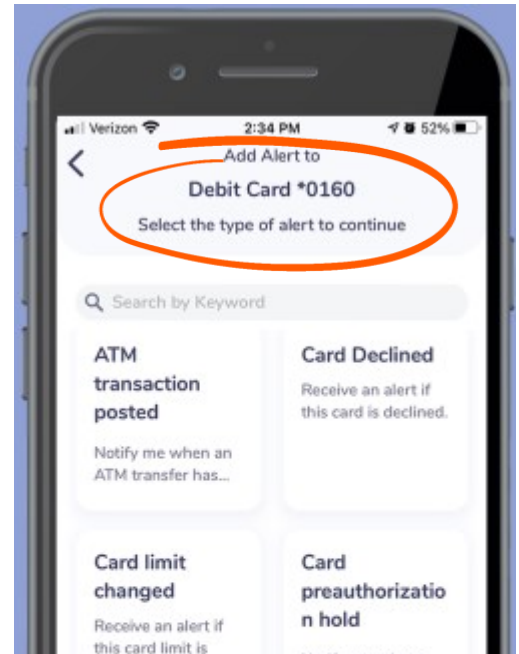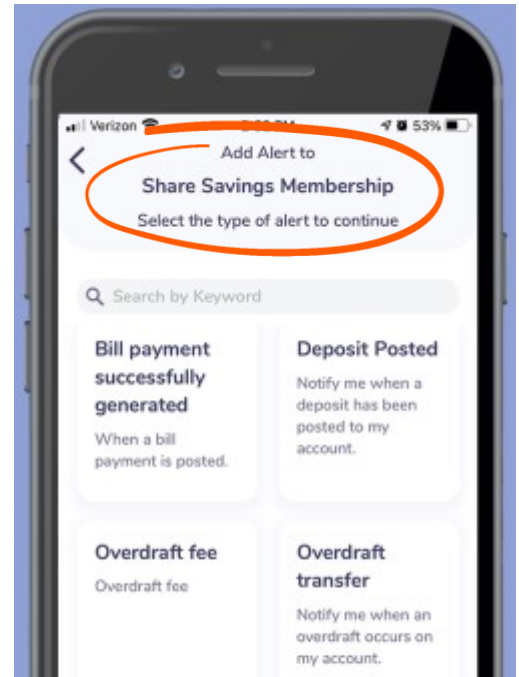
Checking & Savings Accounts

- Posting of bill payment

- Balance below amount

- Overdrafts & fees

- Notification of deposit to account

- And more

Loans

- Payment due

- Payment not received

- Payment received

- And more

Debit Cards

- ATM transaction posted

- Card purchases posted

- Card declined

- And more

Create Share icon: Click on the create share and you are take to the Trius online account opening site. Follow the prompts on your screen to begin the account opening process.
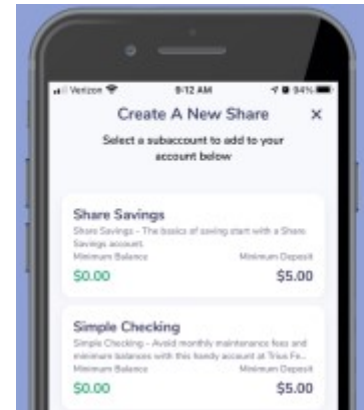
Apply for Loan icon: Click here for our online loan application. It's here to make your next loan as convenient as possible! Select the items based on your situation and follow the on screen prompts to complete your application. Once the application has been submitted a loan officer will be in contact with you. For any questions or concerns please contact us.
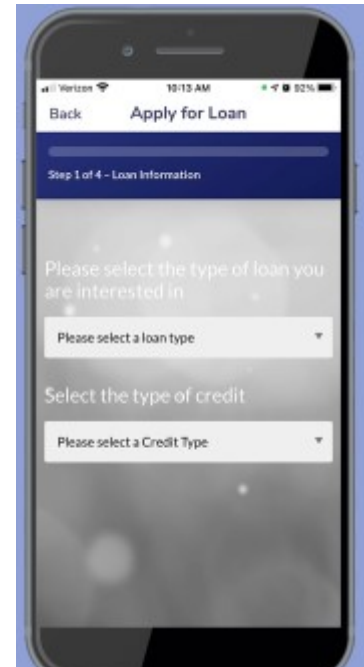
Pay Bill icon: View and manage your bill payments and payees. The first time you use bill pay you will need to register your default account. Select the account from the list. Select a challenge questions, then accept the terms and conditions. Your bill pay information will appear.
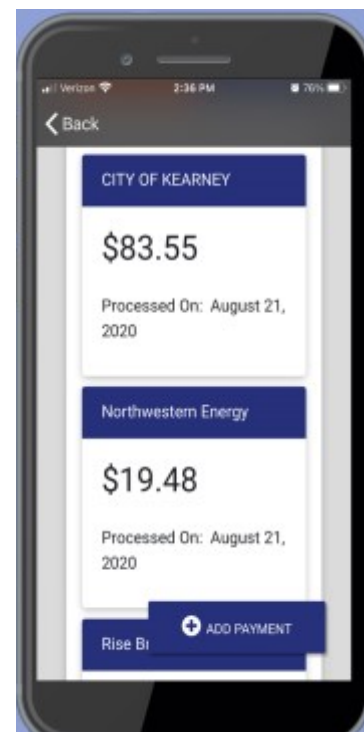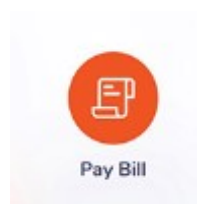
You may register more that one account. When processing a payment your default account is automatically selected. If you want to pay from a different account select it from the pay from drop down menu.

If you are a new bill pay member, begin by adding a payee. See bill pay demo.

My Finance icon: The my finance icon from the bottom menu includes several convenient features.

Recipients
- View & manage your other Trius member contacts
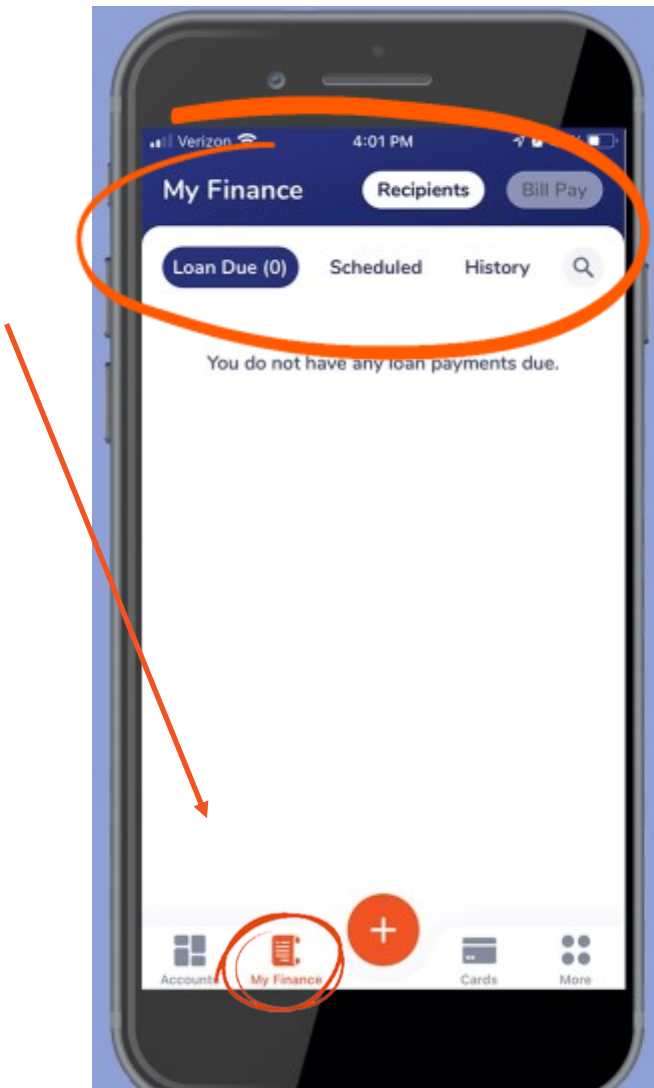
Bill Pay
- View eligible bill pay accounts

Loan Due
- See loan payments due

Scheduled
- See scheduled payments

History
- See transaction history
- Search transaction history by amount or detail

Cards icon: The cards icon from the bottom menu will provide you with the ability to manage your card accounts, both your Trius Visa debit card and your Trius Visa Platinum credit card. First click on the cards icon from the bottom menu and select the card account you want to view.

Debit Card Options: When you select your debit card, you will have the option to block your card or make changes to the settings. You can also add alerts from this screen.
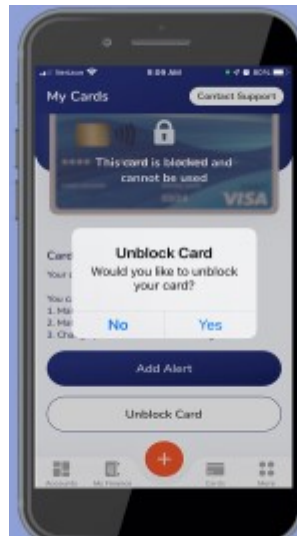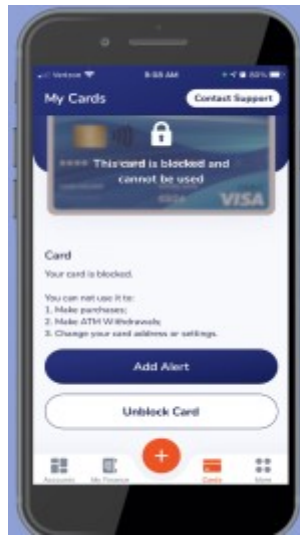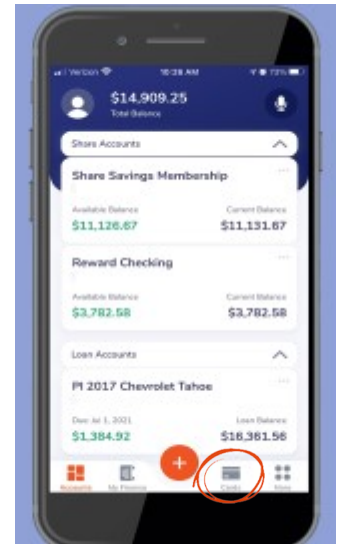
Credit Card Options: When you click on your Trius Visa credit card you have the option to click on manage card which will take you to the **ecad** management portal. Here you can view transactions, your statement, make a credit card payment, set alerts, check your rewards, and more.
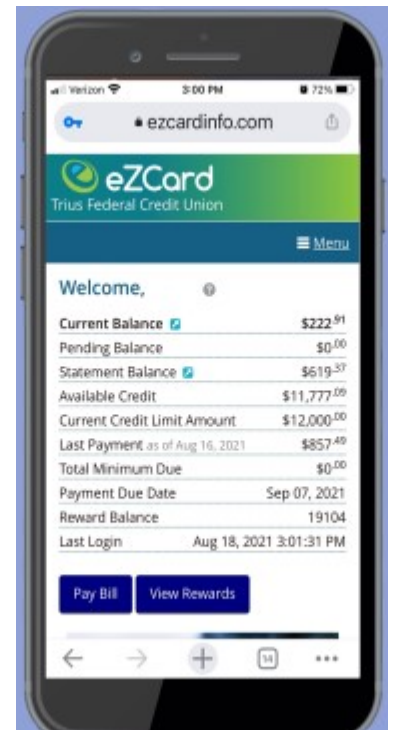
More icon: The more icon at the bottom menu will open a variety of options to help personalize your mobile banking experience.

App Setting: Create and enable face ID, touch ID or PIN ID depending on the functionality of our smart phone. You will also have the option to change your password.

Alerts: Add alerts to any account or Trius debit card.

E-Documents: View electronic statements and notices, or enroll in e-statements and e-documents.

Secure Message: Send Trius a secure message with any questions you may have.

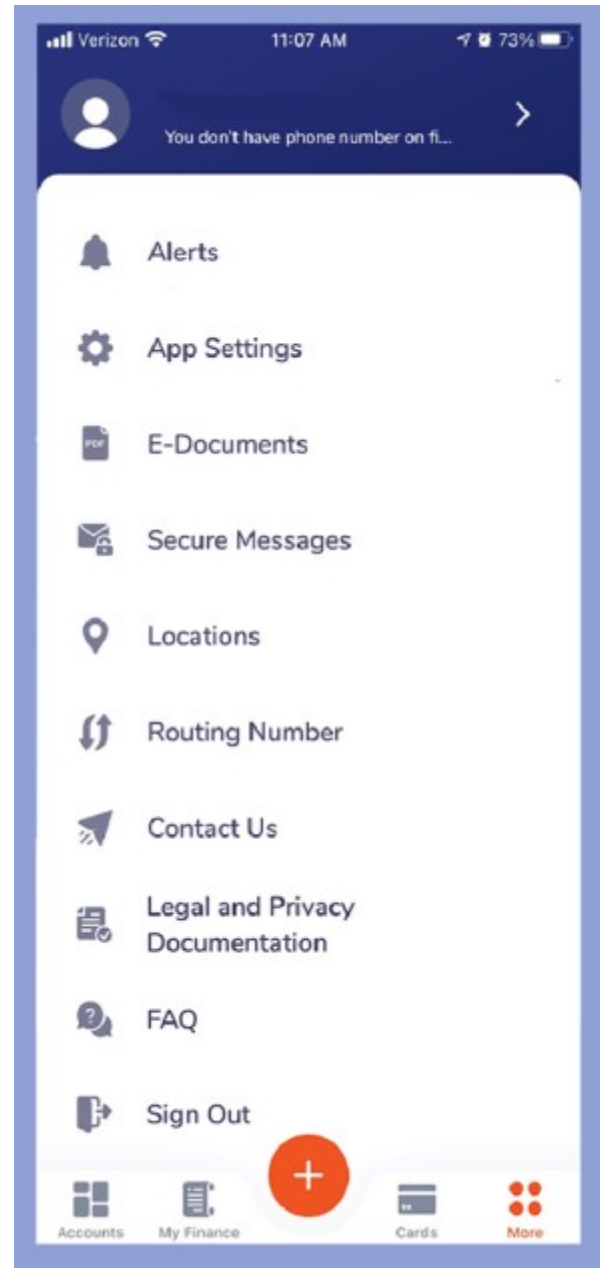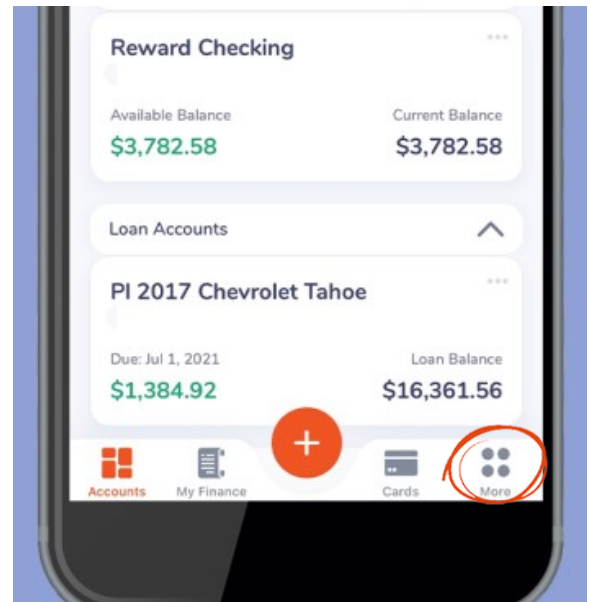**Locations:** View our location addresses, and find local Shared Branching locations.

Routing Number: A pop-up box appears with the Trius Federal Credit Union routing number.

Contact Us: A pop-up box appears with an option to click to call or email Trius.

Legal and Privacy Documentation: View our privacy policy and terms of service.

FAQ: You are taken to the general frequently asked questions on our website.

Sign Out: You will be logged out of the app.