

Online Access– PC/Laptop

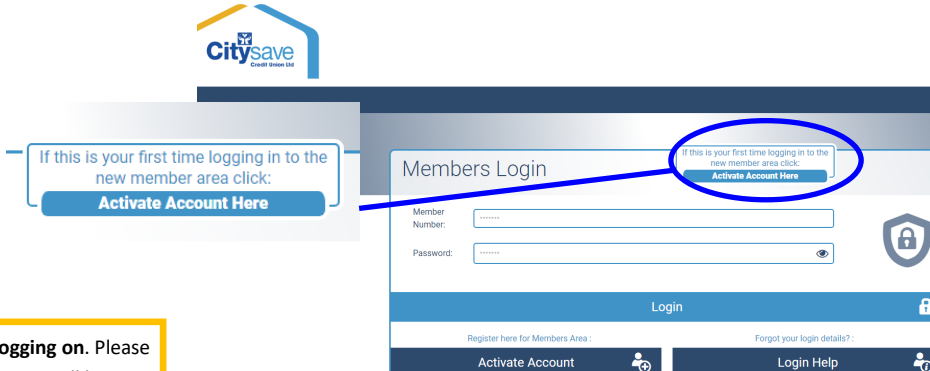
To log onto the online area via PC, please go to <https://www.citysave.org.uk/>

This will take you to our main home page which you will then need to go to the “Log in” button as shown.

Once you have clicked log on page, please go to

“**Activate account here**” to fill out the

registration. You will need to do this as the old online area registrations are no longer valid for the new mobile app/ online are.



You will need to fill out the registration **before logging on**. Please have your membership to hand when doing this. You will be asked the following:

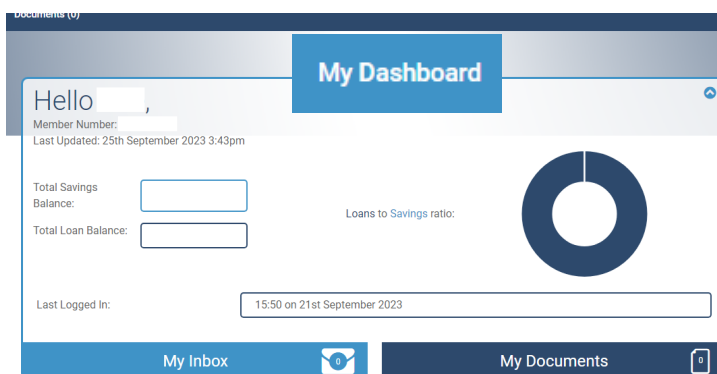
- ◇ Your membership number
- ◇ Your first name
- ◇ Create a password

There will also be a Two factor authentication code with you can choose to have sent to either your phone or email -

If you are not receiving the code please call the office on 0121 616 6200 to check the details we hold for you.

Once you have registered once you will not need to do it again for the mobile, the one registration will be used for both.

Once you have registered please log in—this will take you to you “Dashboard “ which is an overview of your account as seen below:



Click “**My Profile**” to access and edit the following:

Personal information

Payees (the bank account linked to your savings where you make withdrawals to)

Contact information

Communication Preferences

Change password

*Please note any changes made regarding personal details and bank details will be requested to go back to the office for the necessary checks to be completed, from here the changes will either be accepted or declined. If the changes are declined we will get in touch with you regarding this.



My Profile

Once you log onto the online area and go to “ My Profile “ this is what should come up.

Hello
Member Number: [redacted]
Last Updated: 25th September 2023 3:43pm

Total Savings Balance: [input]
Total Loan Balance: [input]
Loans to Savings ratio: [donut chart]

Personal Information
Personal information **cannot** be changed here on the website. To change any of these details please call our branch during office hours on 0121 616 6200, or go to your inbox to message us.

Title [input] Gender [input]
First Name [input] Date of Birth [input]
Middle Name(s) [input]
Last Name [input]

Payees
Set up accounts you wish to pay into regularly

Account Holder	Account No.	Sort Code	Reference

Change Password
To change your password please enter your old password and confirm your new password below:

Old Password [input] Confirm New Password [input]
New Password [input] [Change Password]

Contact Information
Contact information can be changed here on the website. Changes to an address may take up to 72 hours to verify and update.

House Name/Number [input] Email Address [input]
Address Line 2 [input] [Update Email]
Address Line 3 [input] Home Telephone Number [input]
Town [input] Mobile Number [input]
City [input] [Update Telephone]
Postcode [input] [Update Address]

Communication Preferences
Let us know how you would like us to communicate with you by updating your communication preferences.
[Update Communication Preferences]

On this page you will be able to view and edit the following:

- Contact information
- Bank details
- Address
- Password

Accounts

Hello
Member Number: [redacted]
Last Updated: 25th September 2023 3:43pm

Total Savings Balance: [input]
Total Loan Balance: [input]
Loans to Savings ratio: [donut chart]

Your Shares/Savings Accounts

Name	Balance	Options
Free balance	£1,114	[View] [Withdraw]

Your Loan Accounts

Name	Balance*	Options
Payroll Gold		[View]

* Balances do not include any accrued interest

The “Accounts” tab is where you can view the balances of your savings and loans account.

This is where you can also withdraw from your account by selecting the “withdraw” button; this will bring up the box below where you will select where you would like the authentication code to be sent to which can be either be sent via SMS or email.

Once you have received the authentication code you will be able to withdraw the funds on a two working day transfer .

Account Withdrawal

Send verification code to my:
[Select one] [Send Code]
Verification code: [input]
[Submit Code]

Account Statement

Account Holder: [redacted]
Account Type: Payroll Gold
Opening Balance: £0.00
Outstanding Balance: £2,159.01

Date Range: [input] [No Dates Selected] [Print Statement]

Show 25 entries

Date	Description	Credits (£)	Debits (£)	Interest (£)	Interest (£)

In addition to this, you can also view and print your account statements, search specific dates, check the interest you are paying each month and more!

Inbox (0)

Documents

Our Documents [Upload Documents] [Upload]

Show 10 entries [Search]

Date	Filename	Description	Actions

Showing 0 to 0 of 0 entries

Under the inbox tab you will be able to send and receive messages from the Citysave team. You can also access the documents which you have uploaded. Please note you will not have access to the documents we have placed on your account.

Inbox

13/07/2023 09:57 Subject: Message from Mobile App [Read Messages] [New Message]