Getting Started

BROWSER AND DEVICE SUPPORT

You can manage your account online via desktop, tablet, or mobile devices at any time and from anywhere. For optimal experience, make sure your devices are using the most updated versions of software available.

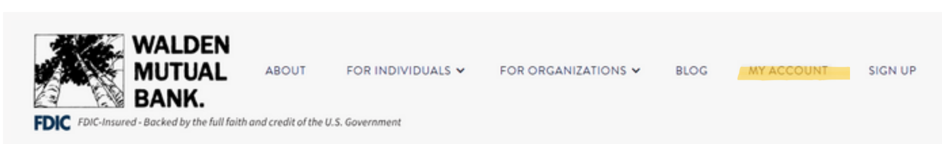
Browser Support: Browsers should be within the latest 2 versions (Safari, Chrome, Edge, Firefox). Internet Explorer 11 is not a supported browser.

Device Support

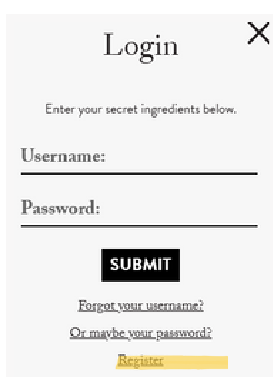
·Windows: Versions still supported by Microsoft & support a browser listed above
·OS X: Versions still supported by Apple & support a browser listed above
·Android: Version 9.0+
·iOS: Last 2 major releases

REGISTER (ADMINISTRATORS ONLY)

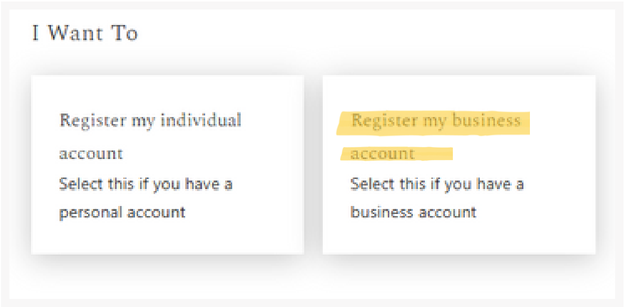
Register by going to www.waldenmutual.com. In the upper right corner of the screen click **My Account** to open the login screen. This will also be the same way to login once the account has been registered.



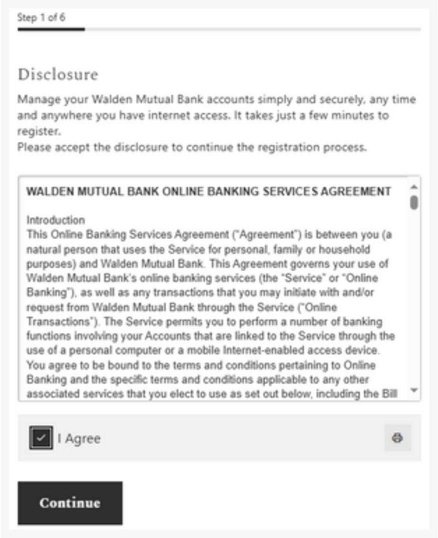
Click **Register**.



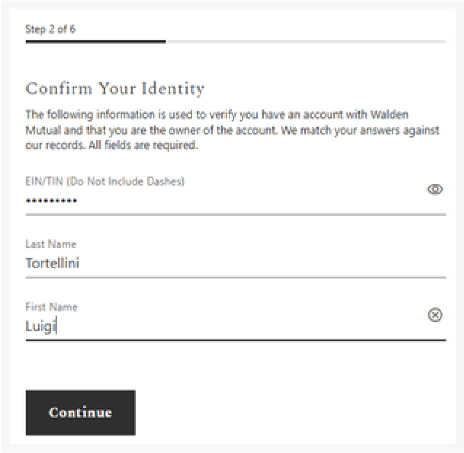
Select **Register my business account.**



Read through our disclosures, place a checkmark to agree to them, then click **Continue.**

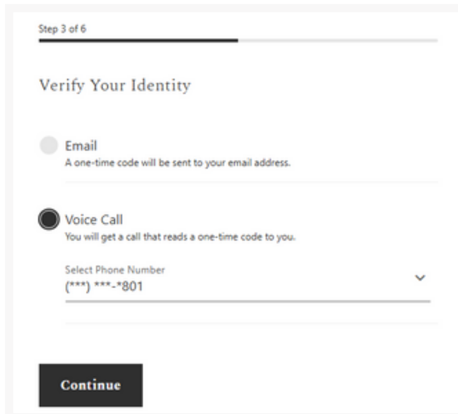


Confirm your identity by entering your **Organizations EIN,** your **Last Name and** your **First Name.** Click **Continue.**

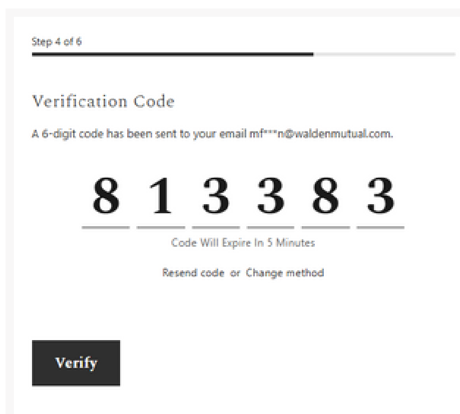


NOTE: If you receive an "Unable to locate your record based on the information you provided", please make sure you are entering your information that correlates with your application submitted. If the problem persists, reach out to the Partner Experience team.

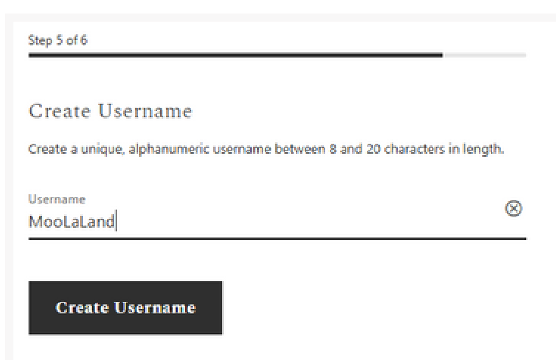
Select email or phone call verification method then click **Continue.**



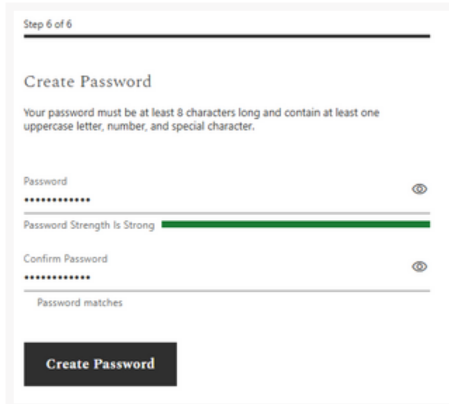
Enter verification code received then click **Verify.**



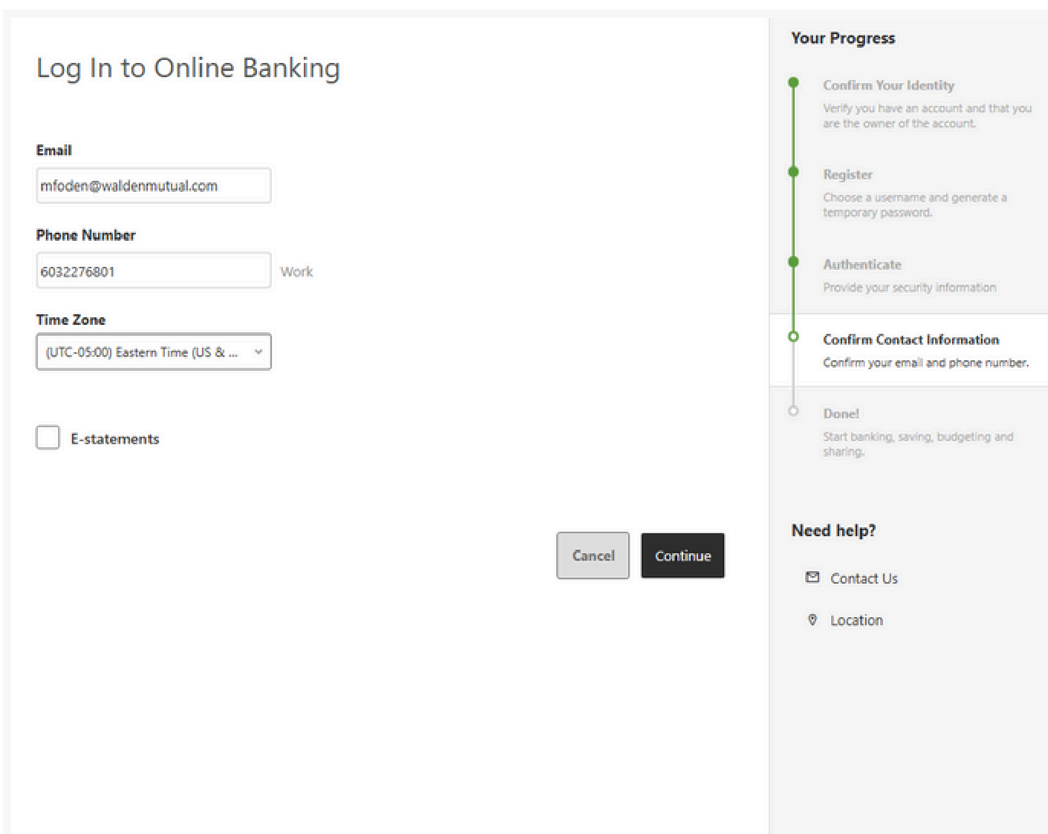
Create username then click **Continue.**



Create your password then click **Create Password.**



The final step of registering is confirming your **Contact Information**, and enrolling in **E-Statements**. Enroll by placing a checkmark next to E-Statements. Click **Continue** to be brought to your new account's Dashboard.



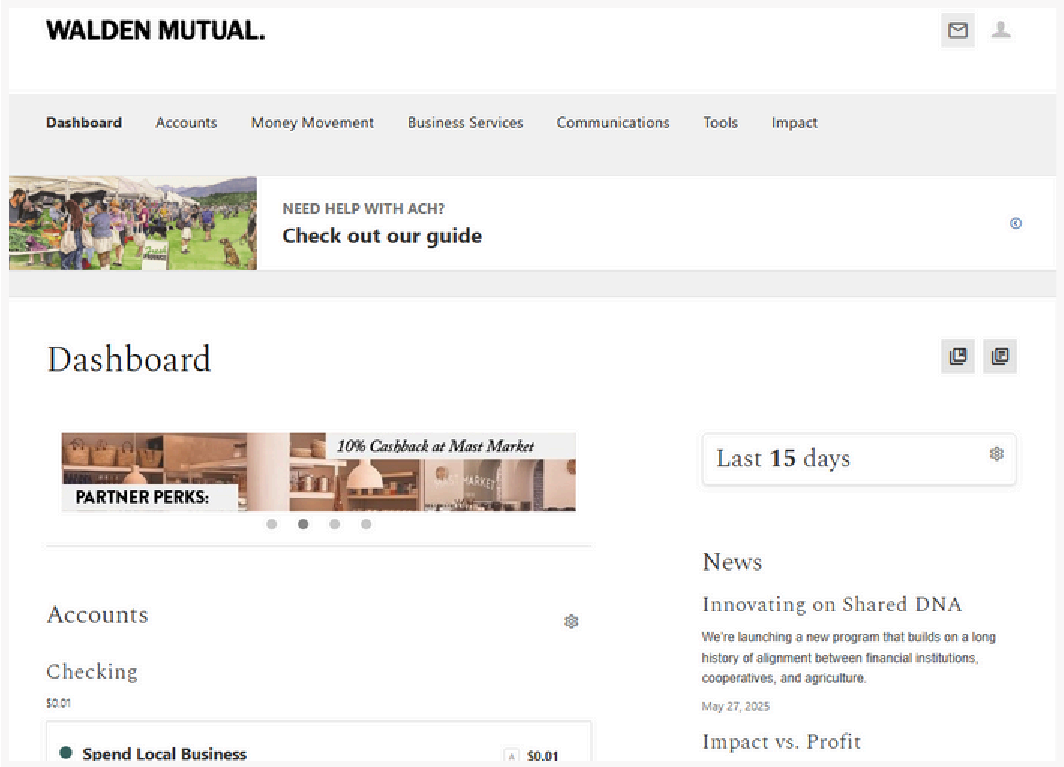
DASHBOARD

Upon logging in, you will be directed to the dashboard screen. The dashboard allows you to view the following items:

Accounts: Full account number and available balance are shown. Accounts are grouped by account type (e.g. checking, savings, and loans).

Activity: Provides a quick glance of recent and future activities.

What's going on with Walden: Partner stories, helpful guides, and important reminders (e.g. closed for Federal Holiday or internal events) will be communicated on this page.



OVERVIEW

We're focused on providing a digital banking experience that makes it easy to review, monitor, and manage your finances on your terms.

Here is an overview of some of the available features.

ACCOUNTS

The **Accounts** menu allows you view your account information, transactions, or open additional accounts.

NAME	DESCRIPTION
Accounts	View transactions, account details and analytics.
Open New Account	Open a Spend Local, Save Local or Local Impact CD.
Statements	View and download statements and other important account documents

MONEY MOVEMENT

The **Money Movement** menu allows you to send or pull money from external accounts.

NAME	DESCRIPTION
Internal Transfers	Move money from one Walden account to another.
External ACH	Create ACH Templates, add payees, and submit ACH transfers.
Wires	Create, manage, and send domestic wires.
Bill Pay	Create, manage, and send payees payments via checks or electronically (if vendor allows).
Check Deposit	Remotely deposit checks made out to your business via our mobile app or desktop scanner (additional set up and fees for desktop scanner).

BUSINESS SERVICES

The **Business Services** menu allows organizations to access our specialized business banking features.

NAME	DESCRIPTION
Admin Configuration	Admins and users can create/modify users. Users can create payees and approve authorizations.
Reports	View Daily Reconciliation Reports or create Custom Reports of ACH details, transaction history, and user activity.
Fraud Prevention	Create and manage fraud preventions services such as Check Positive Pay and ACH Debit/Credit Blocker (additional set up and fees for this service).

COMMUNICATIONS

The **Communications** menu allows for you to directly communicate with the Partner Experience team.

NAME	DESCRIPTION
Account Service Requests	Requests such as changes, inquiries or actions for accounts can be submitted here.
Message Center	Securely send and receive messages from our Partner Experience team.

TOOLS

The **Tools** menu allows you to update your profile and further manage your accounts.

NAME	DESCRIPTION
FAQs	Access our Frequently Asked Questions page.
Alerts	Create specialized account or activityalerts, sent via text message or email.
Settings	Manage settings for your profile.
Stop Payment	Create a check stop payment.
Book An Appointment	Need extra help? Book a virtual, phone or in person appointment with a Partner Experience team member.

IMPACT

The **Impact** menu links to recent partner stories and information about the impact generated by your partnership with Walden.

NAME	DESCRIPTION
Annual Report	Access our most recent Annual Report.
Our Blog	Access to our blog ,where we cover topics such as Partner Stories, Sustainable Banking and Governance.
Partner Perks	Access our Partner Perks page to learn more about our local food ecosystems and other partner businesses. Interested in participating in Partner Perks? Contact Partner Experience.