



Frequently Asked Questions by Microsoft® Money Users about West Coast Bank Personal Finance Manager (PFM)

Question: What system requirements are necessary to use PFM?

Answer: You must be enrolled in Online Banking with West Coast Bank, and have Microsoft Money for Windows 2005-2007 installed on your computer.

Question: How do I register for West Coast Bank's Online Banking?

Answer: Go to wcb.com , and click on the drop down arrow under online Banking login or the “Need to enroll in Online Banking CLICK HERE link” and complete the registration form .

If you have any questions or concerns, please contact the WCB Customer Support Center for assistance at 800/895-3345 or homebanking@wcb.com.

Question: How do I register for PFM?

Answer: If you are a registered Online Banking customer and would like to download transactions to your Personal Finance Product Microsoft Money software please contact WCB Customer Support at 800-895-3345 or homebanking@wcb.com.

Question: What do I do if I get a message that West Coast Bank is not a valid institution when setting up online accounts in Microsoft Money?

Answer: Your Microsoft Money files need to be updated on your computer. From the Tools menu choose Update Internet Information. You should connect to Microsoft over the Internet and download files. Please note this may take up to several minutes depending on how long it has been since your last update. Make sure you allow enough time to complete the update before trying to set up account and online services.

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Question: If I already have Microsoft Money 2005-2007 installed on my computer, how do I set up my account(s) with West Coast Bank for Online Account Access?

Answer: Once you have received your registration confirmation and are registered with West Coast Bank to use PFM, follow the instructions in Money to set-up account.

1. From the **Accounts & Bills** menu, choose **Account Setup**.
2. Click on the **Add a new account** link
3. Enter **West Coast Bank** in the institution field and click **Next**.
4. Select **West Coast Bank** in the list and click **Next**.
5. Provide the information in the Account Setup wizard.
6. Click **Finish** to create your online accounts.
7. You will return to the Online Service Manager, click to **Setup online services**.
8. Confirm **West Coast Bank** is selected and click **Next**.
9. Enter your **usercode and PFM password** (Entered when completing the Personal Finance Registration form) and click **Next**.
10. Confirm account information downloaded and click **Next**.
11. Select the amount of transactions to be downloaded and click **Next**.
12. Click **Done**.
13. Click **Done** a second time.
14. Your account information is now updated into your register.

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Question: If I have Microsoft Money, and my account setup is already completed, how do I now edit it for Online Account Access?

Answer: From the **Accounts & Bills** menu, choose **Account Setup**. Click to **Setup online services** and follow the displayed instructions.

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