

Digital Banking Guide

Statement and Documents



capitalbankmd.com

User Guide- Statements and Documents

Introduction to Statements and Documents

Statements and Documents functionality offered by Digital Banking simplifies the process of viewing Statements and Documents. You can view electronic versions of your account statements. It provides a clear summary of account activity, including deposits, withdrawals, and balances. Users can choose how they want to receive their account statements, either by mail or electronically.

Overview:

This user guide will explain the process of downloading statements and documents, setting up statement delivery preferences and PDF verification for first time users.

Section 1: Viewing Statements and Documents

Navigation:

- Click on ‘Statements and Documents’ tile under ‘Services’ tab.
- Click on ‘Select on account’ dropdown and select one or multiple accounts.

Please Note: After selecting an account, you may see a message asking you to opt in to view a statement. Navigate to Statement Preferences to update your settings.

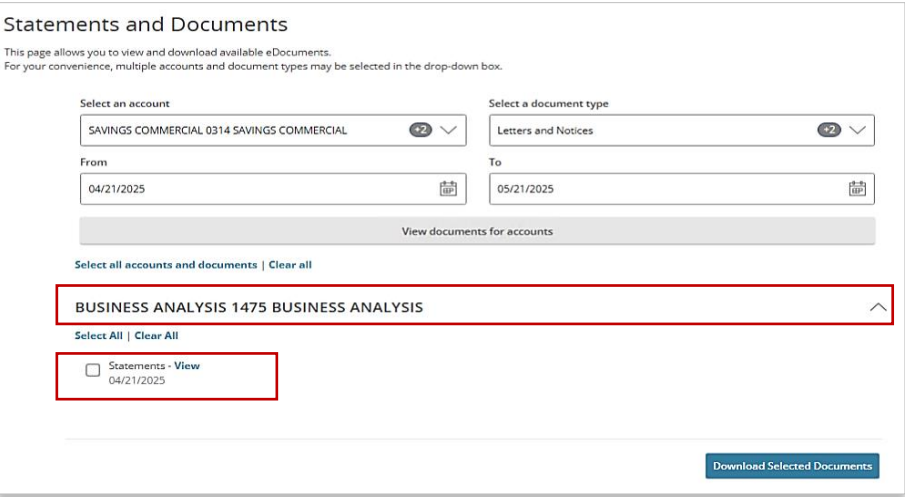
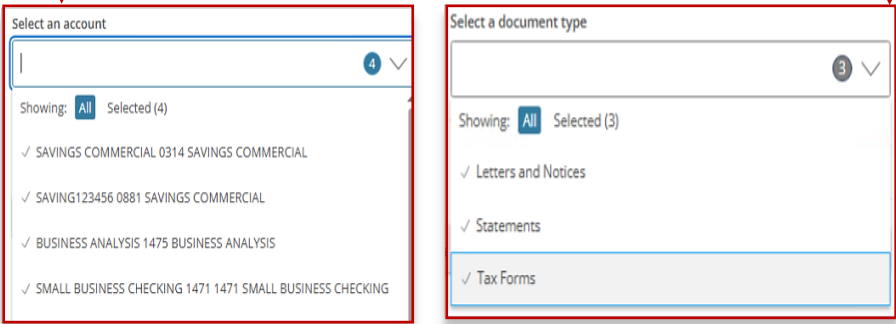
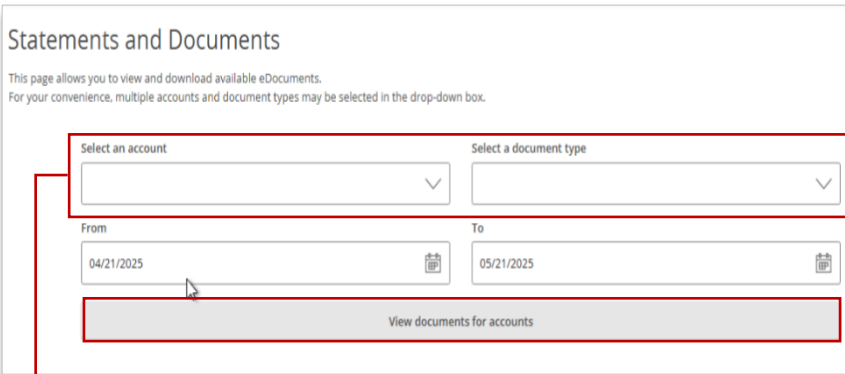
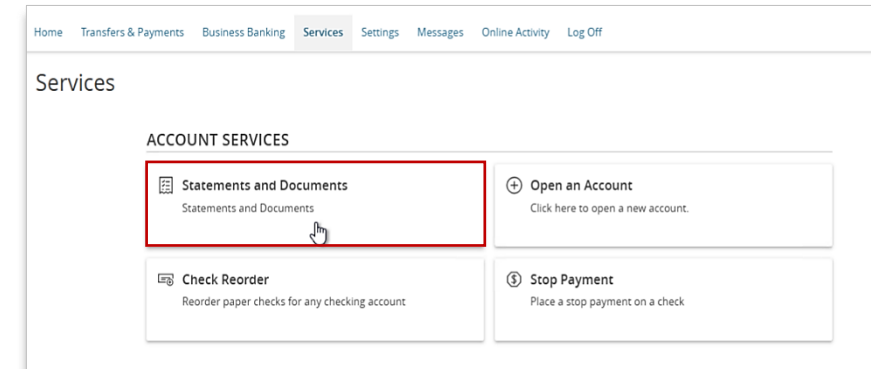
- Click on ‘Select a document type’ dropdown and select one or multiple document types.

Documents available for download are:

- Letters and Notices:** These are messages sent by your bank to inform you about important updates, actions, or account-related events. This includes Loan Billing Statements.
- Statements:** Monthly or quarterly account statements that summarize your account activity.
- Tax forms:** Tax documents provided by your bank that report interest income or other tax-related information.

- Enter the ‘From’ and ‘To’ dates to view the document for the required time period.
- Click on ‘View documents for accounts’ button to generate the documents for accounts.
- Click on the Account name or up- down arrow to expand and collapse the generated documents details under the account.
- View Documents:** Click on the ‘View’ link near the generated document you want to download and click on ‘Download Selected Documents’ button. The system will display the pdf in the new tab.

Please Note: In digital banking, statements may open in a new browser tab or window. Make sure pop-up blockers are turned off for the digital banking site. New users will get prompted to perform PDF verification.



View documents for accounts

Select all accounts and documents | Clear all

BUSINESS ANALYSIS 1475 BUSINESS ANALYSIS

Select All | Clear All

☒ Statements - View
04/22/2025

SMALL BUSINESS CHECKING 1471 1471 SMALL BUSINESS CHECKING

Select All | Clear All

☒ Letters and Notices - View
04/22/2025

☒ Statements - View
04/22/2025

Download Selected Documents

✓

Pending

Please wait while your documents are retrieved. This may take several minutes. You may navigate to another screen during the process and then return to this screen to download the .zip file. Once the documents have been retrieved they will be available for 3 days.

Close

Statements and Documents

This page allows you to view and download available eDocuments.
For your convenience, multiple accounts and document types may be selected in the drop-down box.

Your Requested Account Document is Pending

Your previous request will be available for download shortly. The download will be available for the next 3 days once it becomes available.

Cancel download request | Download .zip file

Select an account

Select a document type

From
04/22/2025

To
05/22/2025

View documents for accounts

Statements and Documents

This page allows you to view and download available eDocuments.
For your convenience, multiple accounts and document types may be selected in the drop-down box.

Your Requested Account Document is Available

Your previous request is available for download. The download will be available for the next 3 days, until Friday, May 23, 2025 at 01:21 AM.

Download .zip file

Select an account

Select a document type

From
04/22/2025

To
05/22/2025

View documents for accounts

8. Download Documents: You can download single or multiple documents together.
- a. To download all the documents for all the accounts, click on ‘Select all accounts and documents’ link and click ‘Clear all’ link to deselect.
 - b. To download all the documents for desired account, click on ‘Select All’ link under the account name and click ‘Clear all’ link to deselect.
 - c. Click on ‘Download Selected Documents’ button.
 - d. The System will prepare for the download and will display an overlay with ‘Pending’ status. You can navigate to any other page or click close button on the overlay while the system prepares download.
 - e. System will display ‘Download .zip file’ button on ‘Statements and Documents’ screen Once the download file is prepared.
 - f. Click on ‘Download .zip file’ button to download the files. Please Note: The ‘Download .zip file’ button will download only the latest requested documents and will be available for next 3 days.

Please Note: Pulling documents for more than 5 accounts at a time may result in significant retrieval delays. It is highly recommended to pull documents in smaller batches for more expedited retrieval time.

PDF Verification

The E-Sign Act requires us to verify that you are able to view PDFs. Please help us by following these two steps:

1

Press "Get Code"—you will see a PDF with a code for you to copy and paste.

Get Code

2

Paste the code exactly as it appears into this field and click Verify.
(Can't see a PDF?)

Enter Code | Verify



PDF Verification

The E-Sign Act requires us to verify that you are able to view PDFs. Please help us by following these two steps:

1

Press "Get Code"—you will see a PDF with a code for you to copy and paste.

Get Code

2

Paste the code exactly as it appears into this field and click Verify.
(Can't see a PDF?)

TWHB | Verify

✓

PDF Verification Success

Close

Section 2: Verifying PDF

The first time you try to view an online statement; you may need to make sure your device can open PDF files. If you're unable to view PDFs, you might need to install a PDF reader like Adobe Reader. You can download it for free here: <http://get.adobe.com/reader>. It works on most devices.

Please Note: In digital banking, statements may open in a new browser tab or window. Make sure pop-up blockers are turned off for the digital banking site.

Navigation:

- 1. Click on ‘Statements and Documents’ tile under ‘Services’ tab.
- 2. The system will display PDF Verification screen.
- 3. Click or tap ‘Get Code’ button. A new tab or window will open.
- 4. Then,
 - a. If the PDF opens: Find the code in the PDF and enter it exactly as shown in the Verification Code box. Then click ‘Verify’ button. A success message will appear. Click ‘Close’ to go back to the Statements page.
 - b. If the PDF does not open: Click on ‘Can't see a PDF’. An error message will appear. Click on Close to go back to the Home page. Make sure you have a PDF reader installed on your device.