

User Dashboard

Once you have logged into your H&R Online account, you will have access to all of your accounts (both Savings & Mortgages) held with the Society.

You will have the ability to view your transactions, make Faster Payment requests (to your nominated bank account, as per your account T&Cs), send and receive secure messages, view previous interest rates and so on.

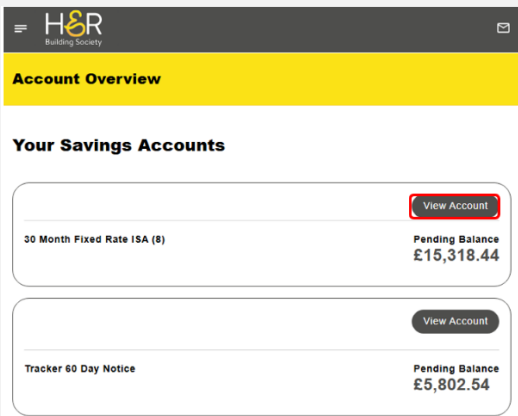
Account Overview & View Transactions

Step 1

Once you have signed in, you will be presented with an overview of your accounts. You will be able to see the Balance of each account and can choose to view more information about your accounts individually by clicking “**View Account**”.

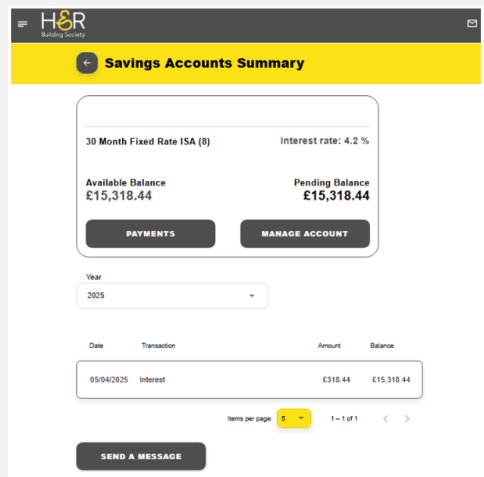
Step 2

You can view the transactions of your individual accounts by clicking “**View Account**” on the relevant account from the “**Account Overview**” screen.



Step 3

Transactions can be seen underneath the account information. You can navigate between years if required.



Quick Access to Guides

[Account Overview & View Transactions](#)

[View Interest Rate History](#)

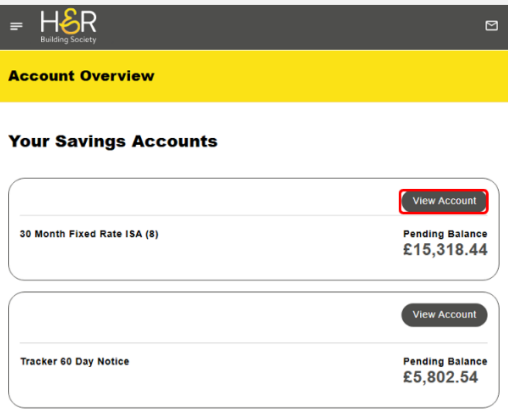
[Amending An Account Nickname](#)

[View/Amend a Savings Goal](#)

View Interest Rate History

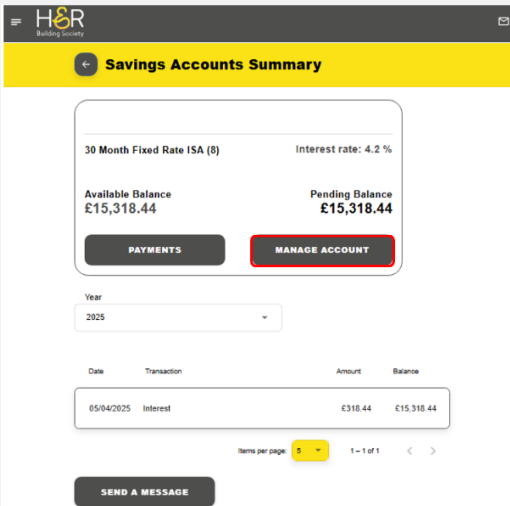
Step 1

You can view the previous interest rates for each of your accounts by clicking **“View Account”** on the relevant account from the **“Account Overview”** screen.



Step 2

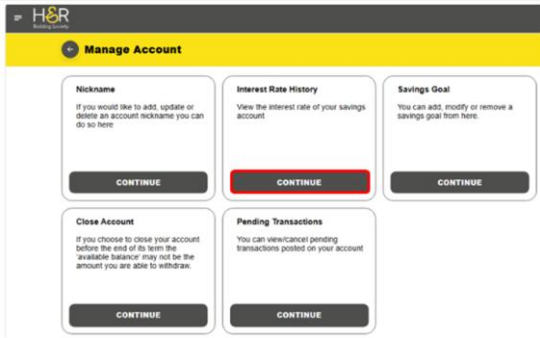
You will then need to click on **“Manage Account”**.



Step 3

You will then need to click **“Continue”** under **“Interest Rate History”**.

You will then be able to view the previous interest rates on your account and navigate between pages if required.



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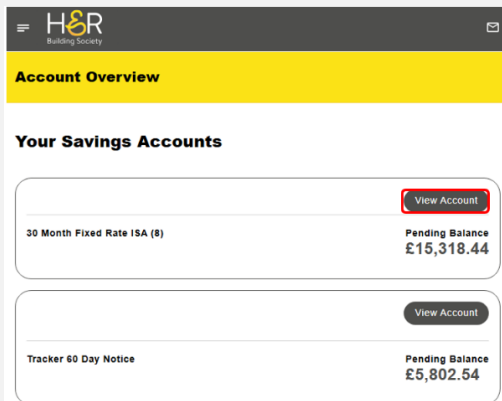
[View/Amend a Savings Goal](#)

Amending An Account Nickname

Step 1

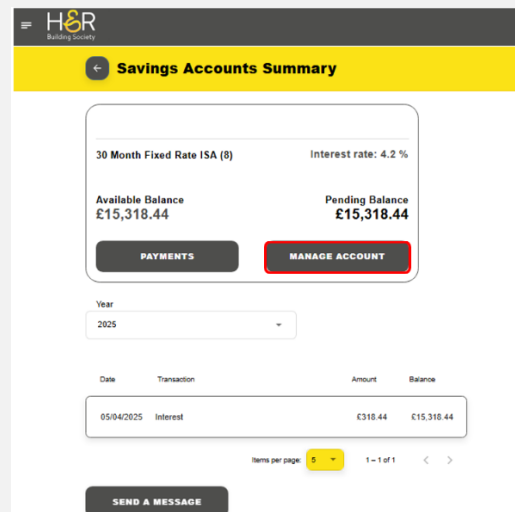
You can create or change the nickname of your account. You may have multiple accounts that you wish to distinguish between, or you could be using the account to save for a specific purpose.

You will need to click on “**View Account**” for the account you wish to amend.



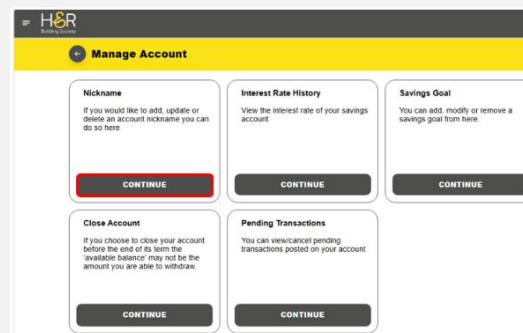
Step 2

Then click on “**Manage Account**”.



Step 3

Then need to click on “**Continue**” under “**Nickname**”.



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[View Interest Rate History](#)

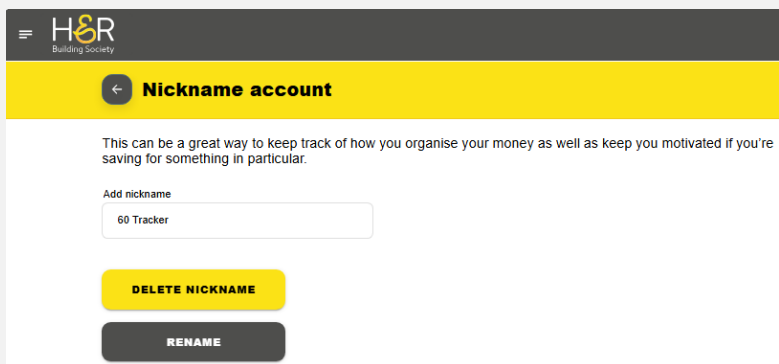
[Amending An Account Nickname](#)

[View/Amend a Savings Goal](#)

Amending An Account Nickname

Step 4

You will then be able to add a relevant nickname before clicking “**Rename**”.



H&R Building Society

← Nickname account

This can be a great way to keep track of how you organise your money as well as keep you motivated if you're saving for something in particular.

Add nickname

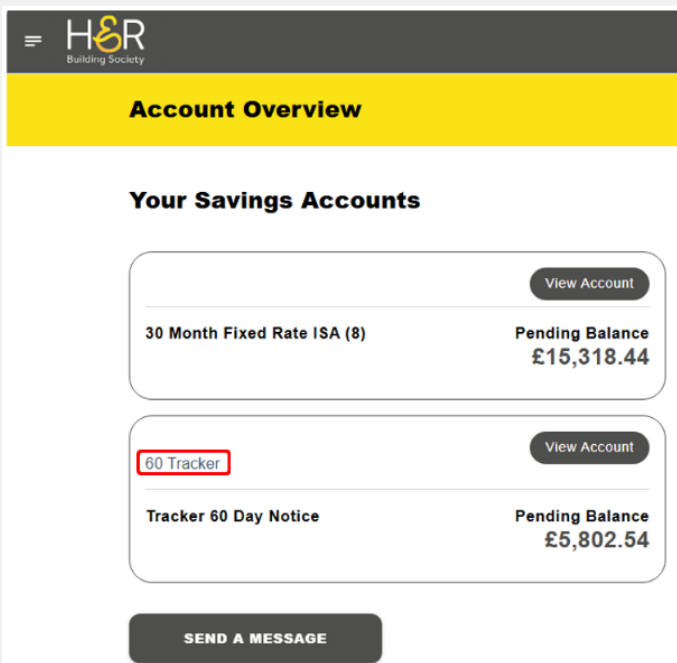
60 Tracker

DELETE NICKNAME

RENAME

Step 5

The nickname will then be visible on the “**Account Overview**” and “**Account Summary**” screens and can be deleted at any time by going back into the “**Nickname account**” screen.



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Account Overview

Your Savings Accounts

30 Month Fixed Rate ISA (8)	Pending Balance £15,318.44
60 Tracker	Pending Balance £5,802.54

SEND A MESSAGE

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[View/Amend a Savings Goal](#)

View/Amend a Savings Goal

Step 1

You can create or amend a Savings Goal.

To do this, you will need to click on **“View Account”** for the relevant account.

H&R Building Society

Account Overview

Your Savings Accounts

30 Month Fixed Rate ISA (8)	Pending Balance £15,318.44
Tracker 60 Day Notice	Pending Balance £5,802.54

Step 2

Then click on **“Manage Account”**.

H&R Building Society

Savings Accounts Summary

30 Month Fixed Rate ISA (8) Interest rate: 4.2 %

Available Balance £15,318.44 Pending Balance £15,318.44

PAYMENTS MANAGE ACCOUNT

Year 2025

Date	Transaction	Amount	Balance
05/04/2025	Interest	£318.44	£15,318.44

Items per page: 5 1 - 1 of 1

SEND A MESSAGE

Step 3

You will then need to click **“Continue”** under **“Savings Goal”**.

H&R Building Society

Manage Account

Nickname
If you would like to add, update or delete an account nickname you can do so here

Interest Rate History
View the interest rate of your savings account

Savings Goal
You can add, modify or remove a savings goal from here

Close Account
If you choose to close your account before the end of its term the 'available balance' may not be the amount you are able to withdraw

Pending Transactions
You can view/cancel pending transactions posted on your account

Quick Access to Guides

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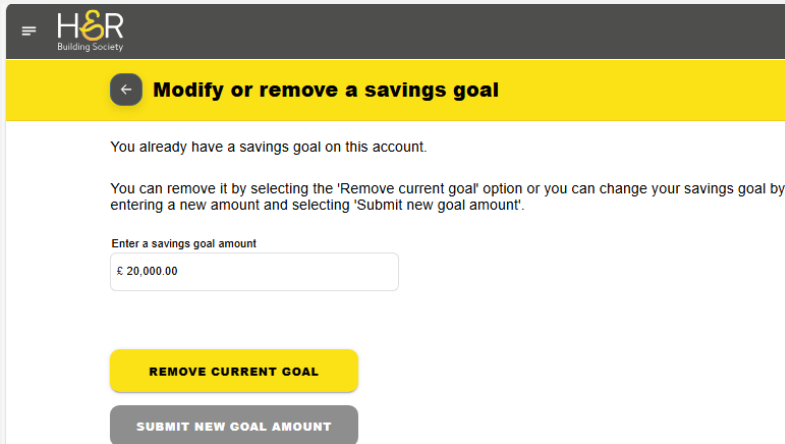
[Amending An Account Nickname](#)

[View/Amend a Savings Goal](#)

View/Amend a Savings Goal

Step 4

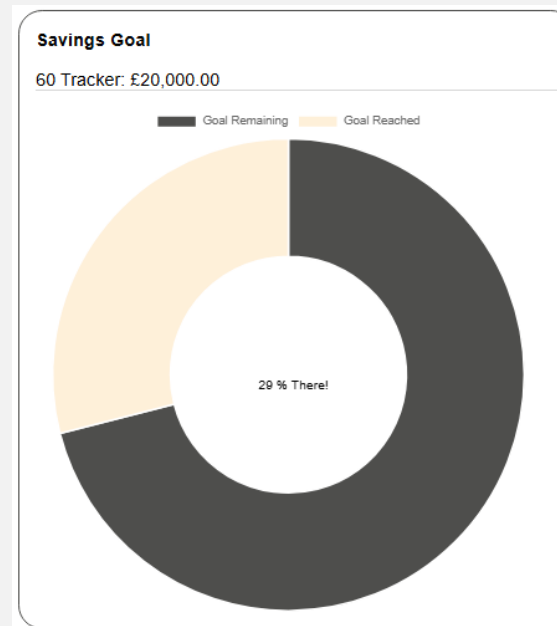
You can add, remove or amend a savings goal by inputting the amount and clicking “**Submit New Goal Amount**” or clicking “**Remove Current Goal**” to delete the current goal.



The screenshot shows the 'Modify or remove a savings goal' screen. At the top, there's a yellow header with a back arrow and the title. Below the header, a message states: 'You already have a savings goal on this account. You can remove it by selecting the 'Remove current goal' option or you can change your savings goal by entering a new amount and selecting 'Submit new goal amount'.' There is a text input field labeled 'Enter a savings goal amount' with the value '£ 20,000.00'. At the bottom, there are two buttons: a yellow 'REMOVE CURRENT GOAL' button and a grey 'SUBMIT NEW GOAL AMOUNT' button.

Step 5

The goal and progress will then show on the “**Savings Accounts Summary**” screen.



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