

Preferences

Security Options

Customer Preferences

Preferences → Security Options → Customer Preferences

The Customer Preferences screen displays basic information regarding the customer along with the additional applications the customer has access to.

CUSTOMER PREFERENCES	
PREFERENCE	CURRENT VALUE
Customer	****0001
Login Name	SusanBanker
Email Address	*****@*****.com
Email alert for new message	Enabled
Mobile Phone #	* Not Activated *
Secondary Users	Allowed
Cash Management	Enabled

Contact/Authorization Method

Preferences → Security Options → Change Security Contact

The Contact/Authorization Method screen displays contact methods that have been created.

Contact / Authorization Method			CONTACT METHOD
These are the contact methods you have previously entered. When signing into Online Banking, you may be asked to select a contact method to have your security code sent to.			New Contact Method
CONTACT LIST			
			SEARCH
NAME	VERIFYDATE	CONTACTDISP	
Brandi	12/28/2016 8:55:18 AM	bhobbs@datacenterinc.com	X
Brooke Fuller	1/17/2018 1:38:54 PM	bfuller@datacenterinc.com	X

1. Click **New** or *New Contact Method* to create a new contact method.
2. Indicate the method for contact in the Contact Type field.
3. Enter a name in the Name field. This is only used to reference the contact method.
4. Enter the Phone Number, Email or Google Authenticator information.
5. Click **Submit**.

ADD CONTACT

CONTACT TYPE
 SMS ▼

After entering in your contact information, a confirmation code will be sent to the phone number provided. You must enter this code on the 'Contact Method' page prior to use.

NAME
 Bobby Banker

PHONENUMBER
 555-555-5555

Cancel
Submit

6. Enter the verification code received via email or text message. If needed, click **Resend** to receive a new code.
7. Click **Submit**.

VERIFY CONTACT

Please enter the confirmation code that was sent to the phone number you provided. (555-555-5555) If you did not receive the code click 'Resend'. Please note that it may take several minutes to receive the confirmation text.

CODE

Cancel
Submit

If **Cancel** was selected, the contact method can still be verified on the Contact/Authorization Method screen. Select  to be returned to the Verify Contact screen.

Contact / Authorization Method
CONTACT METHOD

These are the contact methods you have previously entered. When signing into Online Banking, you may be asked to select a contact method to have your security code sent to.

CONTACT LIST

New Contact Method

SEARCH

NAME	VERIFYDATE ▲	CONTACTDISP		
Bobby Banker		555-555-5555	 Validate	✕
Brooke Fuller	1/17/2018 1:38:54 PM	bfuller@datacenterinc.com		✕

Click  to delete the contact method.

Click  to enter the verification code for the contact method.

Edit Login Name

Preferences → Security Options → Change Login Name

The Edit Login Name screen is used to edit your login name.



EDIT LOGIN NAME

For security reasons, your Login Name may not be the same as your Customer number. The Login Name you create may be up to 15 characters in length. The next time you sign in to Online Banking, you must use this Login Name.

LOGIN NAME
SusanBanker

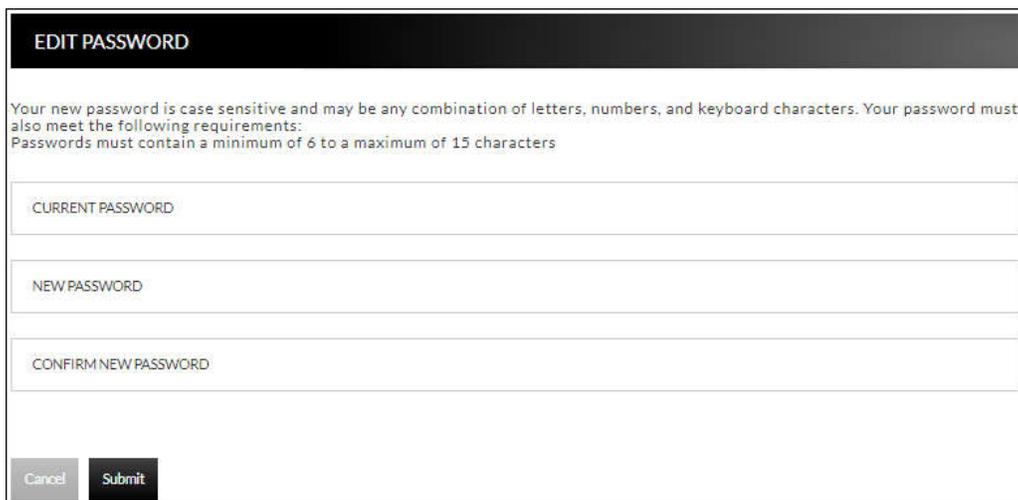
Cancel Submit

Change Password

Preferences → Security Options → Change Password

The Edit Password screen is used to edit your password.

1. Enter the current password used to login to Online Banking.
2. Enter the new password in the New Password field.
3. Re-enter the password in the Confirm Password field.
4. Click **Submit**.



EDIT PASSWORD

Your new password is case sensitive and may be any combination of letters, numbers, and keyboard characters. Your password must also meet the following requirements:
Passwords must contain a minimum of 6 to a maximum of 15 characters

CURRENT PASSWORD

NEW PASSWORD

CONFIRM NEW PASSWORD

Cancel Submit

Internet Options

Edit Email Info

Preferences → Internet Banking Options → Update Email Address

The Edit Email Info screen is used to edit the email address utilized within Online Banking. This is the address notifications will be sent to regarding correspondence within the Online Banking system.

EDIT EMAIL INFO

Changing your email address will invalidate the email address previously registered.

EMAIL ADDRESS
bbanker@none.com

SEND AN ALERT TO THIS ADDRESS WHEN I RECEIVE A SECURE MESSAGE.

Cancel Submit

Friendly Names

Preferences → Internet Banking Options → Friendly Account Names

The Friendly Account Names screen is used to create and edit user defined names for the displayed accounts. Once a name has been created, that name will display throughout Online Banking instead of the account number.

NOTE: *If your bank offers remote deposit capture and there is duplication of names or useage of special characters in these fields, this will cause errors during the registration process.*

Use the sort order column to indicate the order the accounts should display. Sorting will only take effect per account type. For example, you cannot sort checking and loan accounts so they display in a mixed order.

FRIENDLY NAMES				
Checking				
ACCOUNT # 1	AVAILABLE BALANCE \$152,442.69	BALANCE \$152,442.69	ACCOUNT NAME Charles Checking	SORT ORDER
Loan				
ACCOUNT # 100	AVAILABLE BALANCE \$6,000.00	BALANCE \$7,000.00	ACCOUNT NAME	SORT ORDER 1
ACCOUNT # 1	AVAILABLE BALANCE \$0.00	BALANCE \$0.00	ACCOUNT NAME	SORT ORDER 2
ACCOUNT # 20	AVAILABLE BALANCE \$13.25	BALANCE \$40,349.06	ACCOUNT NAME Mazda Loan	SORT ORDER 3
Cancel	Submit			