

# QUICK START GUIDE

## Online Banking Services Menu



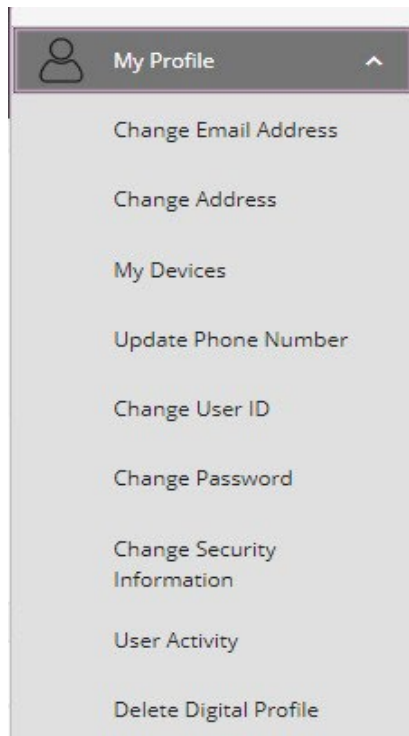
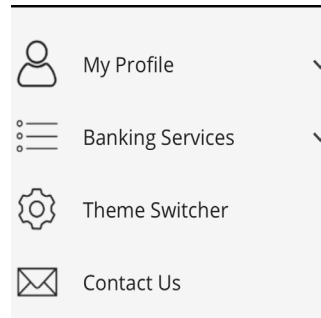
Member FDIC

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## MY PROFILE

My Profile allows you to change your Email, Address and User ID. You can also update your phone number, security information and view User activity. The My Profile link is located on the home page User ID menu dropdown.



Click on the appropriate option to update Email, Address, User ID, Phone Number or review specific User Login Activity.

## MY PROFILE

### Update Email Address

- Click on change email address from the My Profile menu. Your current email address will display.
- Enter new email address and confirm new email address.
- Click the update button.

## Update Email Address

---

Primary Email:

New Email Address:

Confirm Email Address:

For security purposes, you will then receive the Identity Verification screen and choose to receive either a text or a call to verify your identity.

### Identity Verification

As a security precaution, we need to verify your identity before you can proceed. This quick process helps us keep your account safe.

Please choose one of the following options.

**Send me a text message**

We will send you a text message with a confirmation code.

508-123-4567

Send me a text message

**Call my phone**

We will call you and ask you to enter a confirmation code into your phone.

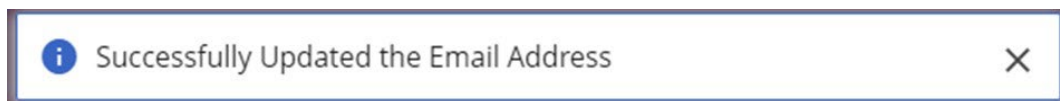
508-123-4567

Call my phone

I can't be reached at any of these numbers

Cancel

Once you have verified your identity, you will receive a confirmation message that your email address has been updated.



## MY PROFILE

### Update Address

- Click on change address from the My Profile menu. Your current address will display.
- Enter new address.
- Click the update button.

### Address Change Module

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Mailing Address:

Address Line 1:

Address Line 2:

...

City:

Country:

State:

ZIP Code:

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### Call my phone

We will call you and ask you to enter a confirmation code into your phone.



508-123-4567

Call my phone

I can't be reached at any of these numbers

Cancel

Once you have verified your identity, you will receive a confirmation message that your email address has been updated.

 Your address has been updated successfully. Your updated address will appear upon your next login. 

## MY PROFILE

### Update Phone Number

- Click on update phone number from the My Profile menu. Your current phone numbers will display.
- Add or edit phone numbers.
- Click the update button.

## Change Phone Number

---

Primary Phone Number

Secondary Phone Number

Work Phone Number

For security purposes, you will then receive the Identity Verification screen and choose to receive either a text or a call to verify your identity.



## Identity Verification

As a security precaution, we need to verify your identity before you can proceed. This quick process helps us keep your account safe.

Please choose one of the following options.

### Send me a text message

We will send you a text message with a confirmation code.

508-123-4567

Send me a text message

### Call my phone

We will call you and ask you to enter a confirmation code into your phone.

508-123-4567

Call my phone

I can't be reached at any of these numbers

Cancel

Once you have verified your identity, you will receive a confirmation message that your phone number has been updated.

 Your profile has been updated successfully.



## MY PROFILE

### Change User ID

- Click on change User ID in the My Profile menu. Your current User ID will display.
- Enter New User ID and Confirm User ID.
- Click the update button.

### Change User ID

Your user ID and password are used to log in to this site. This page allows you to change your user ID. Your user ID must be between 8 and 32 characters in length and may be made up of both letters and numerals. Your user ID is not case sensitive.

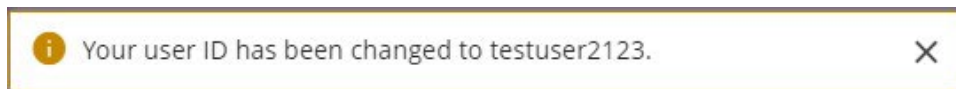
Existing User ID: **USER ID**

New User ID:

Confirm User ID:

You will receive a confirmation message that your User ID has been changed.



## MY PROFILE

### Change Password

- Click on Change Password in the My Profile menu.
- Enter your current password.
- Enter new password and confirm new password.
- Click the update button.

### Change Password

---

Current Password:

New Password:

Confirm Password:

Cancel

Update

You will receive a confirmation message that your Password has been changed.



## MY PROFILE

### Change Security Information

- Click on Change Security Information in the My Profile menu.
- Choose your security questions.
- Enter new answers.
- Click the update button.

### Security Questions

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For your protection, you can establish new security questions and answers. Just like changing your password frequently, changing your security questions and answers helps to ensure the security of your accounts.

As a reminder, if we note unusual activity concerning your account, we will ask some of the questions below to verify your identify and maintain the security of your account. If you share this account with someone else, please make sure to share your updated questions and answers with them as well.

For your protection, from time to time we will ask you to establish new security questions and answers. Just like changing your password frequently, this quick process helps to ensure the security of your accounts.

What was the name of your High School?

What is the first name of the best man at your wedding?

In what city was your mother born? (Enter full name of ..)

After clicking the update button, you will be directed to the Review Questions and Secret Answers page.

**You can either edit your answers or Submit.**

## Please review your Questions and Secret Answers

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### Your Questions and Secret Answers

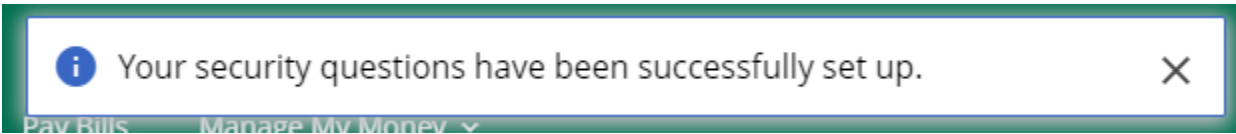
1. What is the name of the first company you worked for?
2. In what city is your vacation home? (Enter full name of city only)
3. What is your mother's middle name?

Edit

Submit

To protect your account, you will be asked to re-enter your password.

You will receive a confirmation message that your security questions have been changed.



## MY PROFILE

### User Activity

Click on User Activity from the My Profile menu.

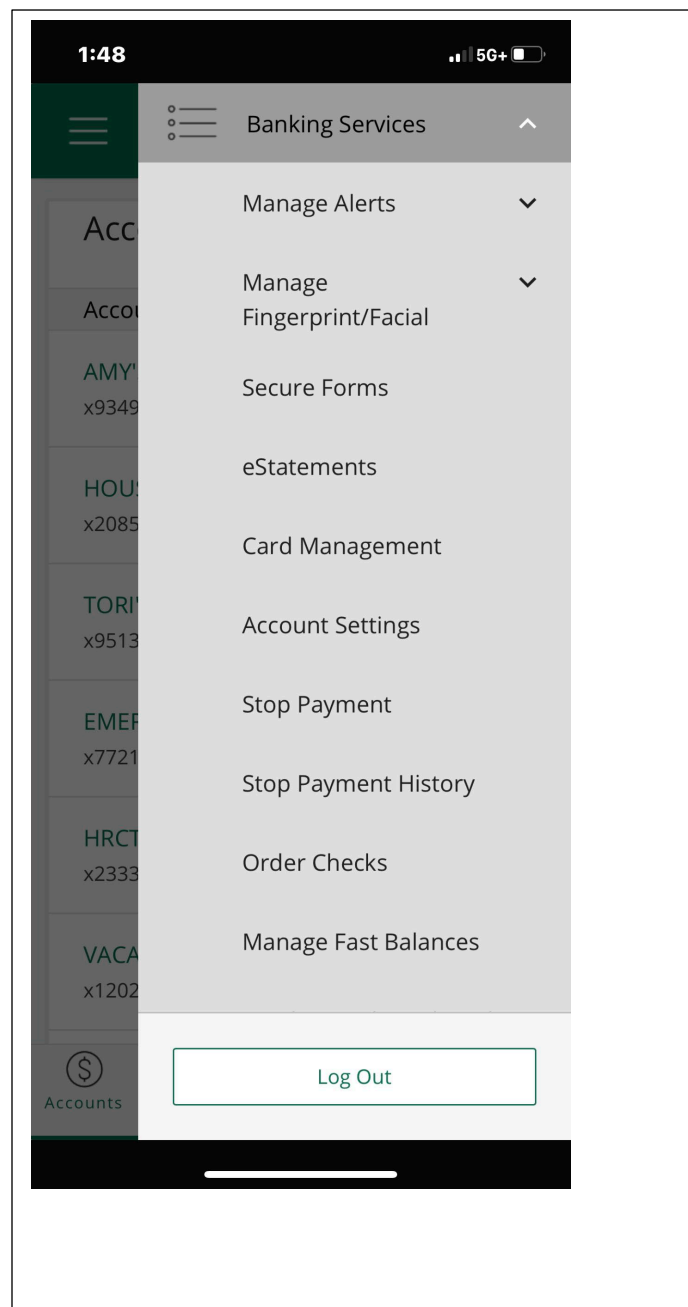
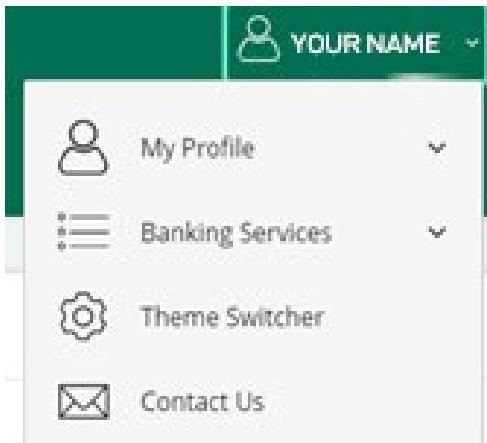
The user activity report will allow you to keep track of any activity on your profile.

#### User Activity

Date	Action
09/20/2022 11:52 AM	Logged in
09/16/2022 3:38 PM	Logged out
09/16/2022 3:37 PM	Logged in
09/16/2022 1:39 PM	Logged in
09/16/2022 1:12 PM	Logged out
09/16/2022 1:04 PM	Changed Login Name
09/16/2022 1:03 PM	Logged in
09/16/2022 1:03 PM	Logged out

## BANKING SERVICES

The Banking Services menu allows you to place stop payments, add alerts, process ATM and Debit card requests and edit your profile and security information. The Banking Services link is located on the home page User ID menu dropdown.



## BANKING SERVICES

### Alerts

Alerts allow you to Create, Change or View Alert activity.

#### Creating an Alert

- Click on create an alert from the menu box.
- Click on the appropriate radio button.
- Click Add Subscription.

#### Add/Edit Notification Subscription

---

Please select an alert type:

- ACH Participant Alert
- ACH Return Available
- ACH Whitelist Alert
- Any Account Activity Alert
- Available Balance Below Limit
- Available Balance Daily Snapshot
- Card Alert
- Current Balance Above Limit
- Current Balance Below Limit
- eNotices Alert
- Insufficient Funds Charge Alert
- Large Check Cleared Alert
- Large Debit Card Purchase Posted
- Large Electronic Check Posted
- Large Electronic Deposit Posted
- Large Withdrawal Posted
- Reminder Alert
- Secure Message Alert
- Specific Check Cleared
- Wire Payee Alert

**Add Subscription**

Enter required information on add notification subscription page and click submit.



## Add Notification Subscription

### Large Electronic Check Posted

Account:

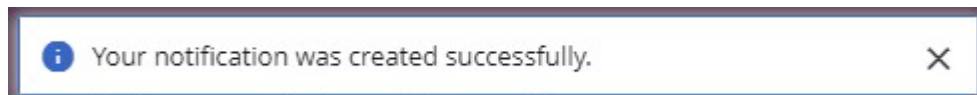
Amount:

### Email Addresses

- email@gmail.com
- email@gmail.com
- email@gmail.com

### Mobile Device

You will receive an acknowledgement at the top of the page stating that your notification was created successfully.



## BANKING SERVICES

### My Alerts

#### Change or View an Alert

Active alerts will be displayed.

#### Current Alerts

Description	Created Date	
Notify me when the current balance on x17 7 is below \$200.00.	02/25/2019 10:52:17 AM	
Notify me when there is an alert for a card: x0043 -	11/02/2019 9:31:18 AM	

Edit the current alerts by selecting the pencil icon located on the right side of the screen. Enter required information and click update.

## Add Notification Subscription

Note: Alerts for each card must be set individually. Edit alerts for existing cards in the Current Alerts section.

### Send me an alert for

All Transactions

Transactions Over

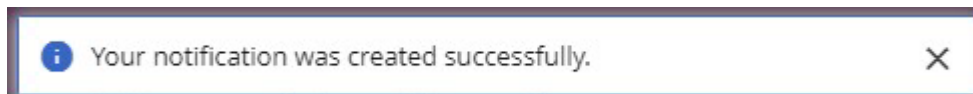
International Transactions

### Merchant Types

Department Stores

Entertainment

You will receive an acknowledgement at the top of the page stating that your notification was created successfully.



Delete current alerts by selecting the trash basket icon on the right side of the screen.

## BANKING SERVICES

### Secure Forms

Provides the ability to notify Bristol County Savings Bank of travel plans or replace ATM/debit card. \*

## Secure Forms List

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### ATM/Debit Card Forms

**Debit Card Replacement Request Form** Please utilize this form to inform us that your card is damaged beyond repair, lost, or stolen and needs to be replaced.

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**Debit/ATM Card Application** Request a Debit/ATM Card linked to a current checking account.

---

**Travel Notification** Let us know about your travel plans and Debit/ATM Card use by using this form.

---

### Replace ATM/Debit Card

***\*Please Note: You may visit any of our Branch location and receive a replacement card instantly.***

### Travel Plans

Click on travel Notification in the menu. Enter required information and hit submit.

Submit Request

---

**Travel Notification**

\* Fields are required

Enter the Debit/Credit Card Number of the card you wish to use, dates you are traveling and enter the Trip Destination in the text box below.

Card Number:\*

Start Date:\*

End Date:\*

Trip Destination:\*

# BANKING SERVICES

## eStatements

To enroll in eStatements select View eDocuments. A new window will open to the Account eStatement Enrollment page. Follow prompts add the Disclosure Acceptance Code to complete the eStatement enrollment.

### eStatements

Account	Description	
STMT SAVS	Statement Savings (x1122)	<a href="#">View eDocuments</a>
Statement Savings	Statement Savings (x6021)	<a href="#">View eDocuments</a>
-E-CHECKING	eChecking (x1737)	<a href="#">View eDocuments</a>
- STMT SAV	Statement Savings (x4489)	<a href="#">View eDocuments</a>

### Tax Documents

Tax Document	
1098	<a href="#">View Document</a>
1099-Int	<a href="#">View Document</a>
1099-Q	<a href="#">View Document</a>
1099-R	<a href="#">View Document</a>
1099-SA	<a href="#">View Document</a>
5498	<a href="#">View Document</a>
5498-ESA	<a href="#">View Document</a>
5498-SA	<a href="#">View Document</a>

### Statement Delivery Preferences



- "Disclosure Acceptance Code" is a required field.

Your current account statement delivery method is listed below. To update your delivery method select All Paper, All Electronic, or you can select the desired Enrollment Preference for individual accounts from the drop down menu.

In order to confirm your changes to your Enrollment Preference, click [HERE](#) to read the ELECTRONIC STATEMENT AGREEMENT. When reading the Electronic Statement Agreement, please locate the Disclosure Acceptance Code at the bottom of the page, enter the code into the box below, and select 'Accept & Update Preferences' button. By completing this process you will agree to the terms and conditions of this Agreement as well as your ability to view eStatements.

\* Disclosure Acceptance Code

All Paper

All Electronic

Account

Enrollment Preference



**Please note: As a business or municipality, if you wish to unselect eStatements, you will need to contact your Banking Relationship Manager.**

## BANKING SERVICES

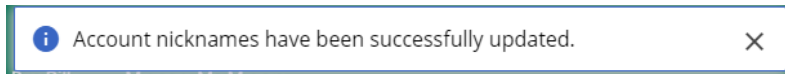
### Manage Account Nicknames

To adjust account Nicknames, click on Account Settings from the Banking Services Menu. Scroll to Manage Nicknames to input the nickname of the account.

#### Manage Nicknames

Account 	Account Name 	Nickname
x1122	Statement Savings	<input type="text" value="JMA STMT SAVS"/>
x1737	eChecking	<input type="text" value="E-CHECKING"/>
x4489	Statement Savings	<input type="text" value="VACATION- STMT SAV"/>

You will receive an acknowledgement at the top of the page stating that your delivery preferences was updated successfully.



## BANKING SERVICES

### Stop Payment/Stop Payment History

#### Stop Payment on a Check:

- Click on Stop Payment link located in the Service Center menu.
- Fill out the necessary fields.
- Click on Submit to verify Stop Payment details.

Stop Payments

Stop Payment Account:  
x1737 - E-CHECKING (Available \$ 53.69) ▼

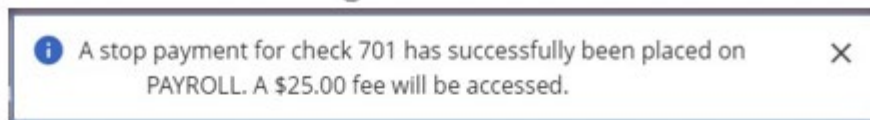
Stop Payment Type:  
 Single Check  
 Range of Checks

\* Check Number:

Check Amount:  
\$

Reason:  
— Select a Reason — ▼

You will receive an acknowledgement at the top of the page stating that your stop payment was created successfully. You will also have the ability to print the stop payment confirmation screen.



#### Stop Payments

Tracking ID: 701  
Account: x580  
Amount: \$1.00  
Check(s): 701  
Scheduled Date & Time: 09/15/2022 10:27:42 AM

Click on Continue to proceed.

## BANKING SERVICES

### Stop Payment/Stop Payment History, continued

Click on Stop Payment History link located in the Banking Services menu and your stop payment history will be displayed.

#### Stop Payment History

---

Account:	E-CHECKING - x1737
Date:	12/02/2022
Starting Check Number:	101
Ending Check Number:	101
Amount:	\$1.00

---

Account:	E-CHECKING - x1737
Date:	12/02/2022
Starting Check Number:	102
Ending Check Number:	105

## BANKING SERVICES

### Quicken® and QuickBooks®

**IMPORTANT INFORMATION: QuickBooks and other account aggregators that use your account credentials: **With the updates to the Online and Mobile Banking experience, there will be an interruption in connectivity that may last up to 48 hours. If the problem persists beyond that timeframe, please contact us at 508-828-5420.****

#### Quicken/QuickBooks

We are happy to provide you with two options to assist you in downloading your account data to your Quicken program. Bristol County Saving Bank has the following connection options for your Quicken software: Quicken/QuickBooks Web Connect and Quicken/QuickBooks Direct Connect

- Select Quicken/QuickBooks from the Banking Services menu.
- Complete self- enrollment by selecting software type and clicking Enroll.

## Direct Connect Self-Enrollment

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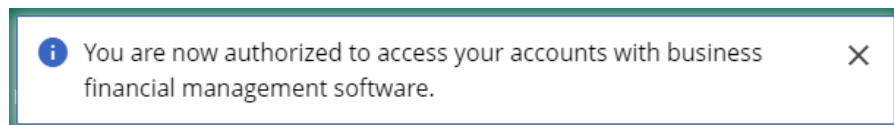
Choose 'Quicken' if you use personal software such as Quicken. Choose 'QuickBooks' if you're a QuickBooks user.

Quicken®

QuickBooks®

Enroll

You will receive a confirmation that you are now authorized to access your accounts with the software.





Select Quicken/QuickBooks from the Banking Services menu to complete download. Select Account, Number of Days and Software type then hit Download.

## Web Connect Download

---

Account:

Download:

30 Days  60 Days  90 Days  120 Days  Other

Software:

## Card Management

Activate/Deactivate

Click Card Management. A list of current cards will be displayed. Click the Activate or Deactivate toggle to process your request.

# Card Management

---

Card Number (.... )



Activate

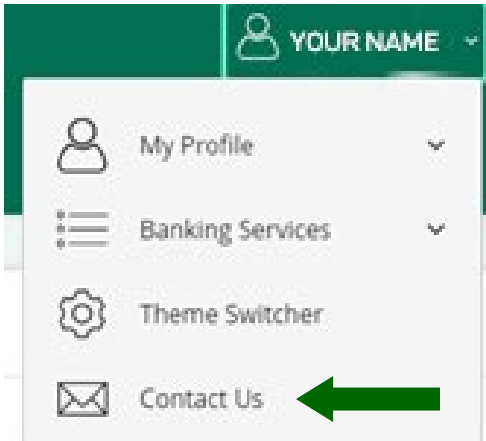
Card Number (.... )



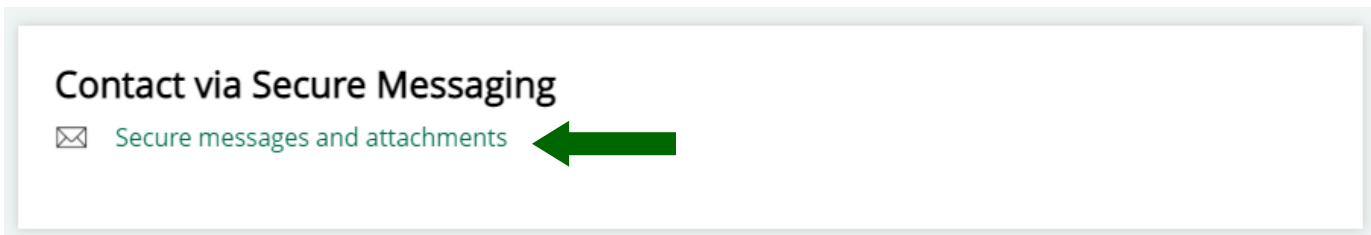
Deactivate

## Messages

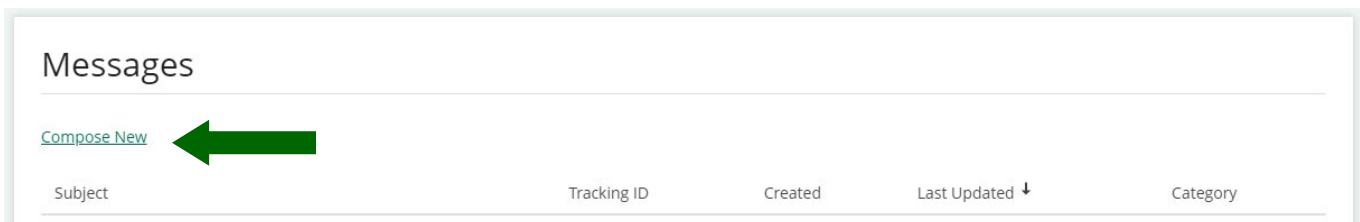
The Contact Us link is located on the home page User ID menu dropdown.



To send a secure message through the Contact Us link, click on Contact via Secure Messaging



Click on Compose New.



Select the appropriate Category, Account (if applicable), and enter a Subject, Message and attachment if available. Check off the box to receive notifications regarding the message. Click on Send.

## Message Detail

Category

— Select a Category —

Status

**New**

Account (if applicable):

— Select an Account —

Subject

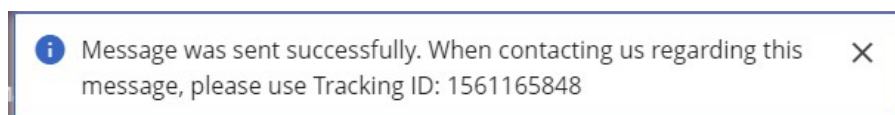
Message

Add Attachment

Send notification on receiving a response to this message.

[Back](#) [Send](#)

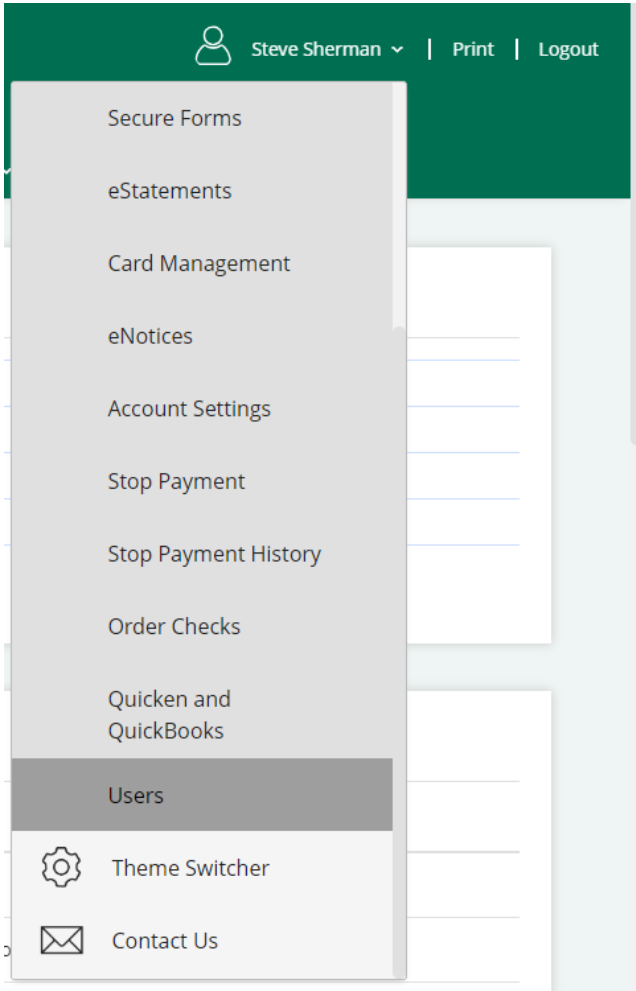
A confirmation will appear on the upper section of the screen to alert you the message was sent.





## BANKING SERVICES FOR BUSINESS AND MUNICIPALITY USE ONLY


### Users

To add, modify or delete user access, you will navigate to the Banking Services screen then, Users and scroll towards the bottom of the page.



 Edit User Details by selecting the pencil icon located on the specific user profile. You can also unlock a disabled user from this screen.

 Edit User Entitlements by selecting the key icon location on the specific user profile.




 Delete users by selecting the trash basket icon. You will be prompted to verify if you would like to delete the specific user. Click on OK or Cancel.

## Adding a User

From the home page User ID menu dropdown, click on the Banking Services, then click on Users.

Click on Add User.

### Users

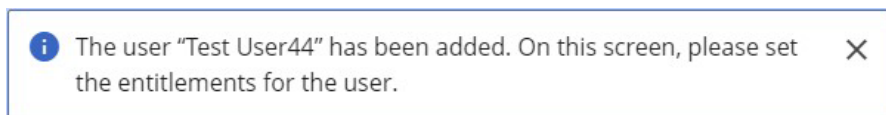
Name ↑	User Type	User ID	Status	Last Login		User Type
Test User22	Business User (Manager)	Test22	Active	09/15/2022 12:54:33 PM		Administrator
Test User33	Business User (Manager)	test33	Active	09/15/2022 12:54:21 PM	  	Administrator

Add User

## User Details

* User ID	Contact Information
<input type="text"/>	* Email Address
* Temporary Password	<input type="text"/>
* Confirm Password	* Home Phone
<input type="text"/>	{ } { } { } <span>Saved to this PC</span>
Status	Mobile Phone
<input checked="" type="radio"/> Active <input type="radio"/> Disabled <input type="radio"/> Locked	{ } { } { }
Personal Information	Work Phone
Title	{ } { } { } ext. { }
<input type="text"/>	Home Address
* First Name	Address Line 1
<input type="text"/>	<input type="text"/>
Middle Name	Address Line 2
<input type="text"/>	<input type="text"/>
* Last Name	City
<input type="text"/>	<input type="text"/>
Suffix	State
<input type="text"/>	<input type="text"/>
Birth Date	ZIP Code
MM/DD/YYYY	<input type="text"/>
Social Security Number	
<input type="text"/>	
<input type="button" value="Cancel"/>	<input type="button" value="Save"/>

Enter necessary User Details.  
Click on Save.



After saving user details, entitlements can be selected. Depending on the type of access you wish to give the user, click on the box  next to the specific access which will expand entitlement options.

Entitlements:

If you want to enable Administrator access for the new user, check off the Manager Users box.  
*Important: Administrators can Add, Edit and Delete other users.*

## Copy Entitlements

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Please select a user you want to copy the entitlements from below.

Entitlements will be copied from User ID: **user** to User ID: **test44**.

ACH and/or Wire access can be added to new users only if it is an existing function for the organization. To add ACH and/or Wire access or increase your limits, contact your Relationship Manager.

Please Note: When assigning entitlements for ACH and/or Wires, limits may be set equal to or lower than the current established limits.

After you have assigned ACH or Wire access to a user, please contact your Relationship Manager or support team to request an RSA Secure Token.




## Entitlements for Test User44

Entitlement	Limit	<input type="checkbox"/>
Accounts		<input checked="" type="checkbox"/>
BAI2 Export		<input checked="" type="checkbox"/>
Positive Pay		<input type="checkbox"/>
Stop Payments		<input checked="" type="checkbox"/>
ACH		<input checked="" type="checkbox"/>
Maximum Transaction Credit	\$ 10.00	<input type="text" value="10.00"/>
Maximum Transaction Debit	\$ 10.00	<input type="text" value="10.00"/>
Maximum Batch Credit	\$ 10.00	<input type="text" value="10.00"/>
Maximum Batch Debit	\$ 10.00	<input type="text" value="10.00"/>
Number of Approvals Required		<input type="text" value="1"/>

Accounts	All Entitlements	Stop Payments	View	ACH From	ACH To	eStatements	eNotices	Transfer From	Transfer To	Wires
Select All Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
x5802 - TEST ACCOUNT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
x5810 - TEST ACCOUNT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Entitlements

- Review Entitlements.  
Click Save to accept entitlements or Cancel if you do not want to grant the entitlements.

To Edit Entitlements, click the Key Icon 

- Make changes by checking/unchecking appropriate boxes.
- Click Save.
- Review the changes.
- Click Confirm to accept changes.

### Entitlements for Test User44

Please review the following changes.

Entitlement	Limit	Old	New
Accounts			
Stop Payments			
Stop Payments			
x5802 - TEST ACCOUNT		X	<input type="checkbox"/>
x5810 - TEST ACCOUNT		X	<input type="checkbox"/>
View			
x5802 - TEST ACCOUNT		X	<input type="checkbox"/>
x5810 - TEST ACCOUNT		X	<input type="checkbox"/>
Transfers			
Maximum Transaction Limit	\$ 20000000.00	0.00	20,000,000.00
Maximum Daily Limit	\$ 20000000.00	0.00	20,000,000.00

Cancel

Edit

Confirm

## Exporting User Entitlements

This feature will allow you to view and/or export the current entitlements for each user within the organization.

- Select Users under the Banking Services Menu – Scroll down to Entitlement Export section and a list of current users will appear.
- Check the box of the individual user(s) you wish to export. To select all users, check the box next to Name.
- Select the export format (Excel or PDF) in the drop-down box and select Export.
- Exported document will be available to view/save and print.

### Entitlement Export

<input type="checkbox"/> Name	User Name
<input type="checkbox"/> Test User22	Test22
<input type="checkbox"/> Test User33	test33
<input type="checkbox"/> Test User44	test44

**Export**

## **Agreements and Disclosures**

Contact your Relationship Manager to request a copy of your specific Account Agreements & Disclosures.

### **Contact**

For assistance, please contact your Relationship Manager or Bristol County Savings Bank at 508-828-5420.