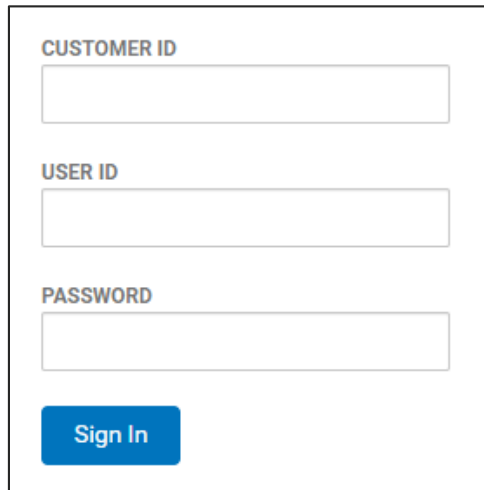


Quick Reference Guide – Login

Signing in for the first time

You will need a Customer ID, a User ID and a Temporary Password to log into the application. Your Customer ID and User ID are delivered to you directly by an administrator. You may receive your temporary password via a system generated mail to your email address on file or also directly from an administrator, depending on your financial institution's settings.

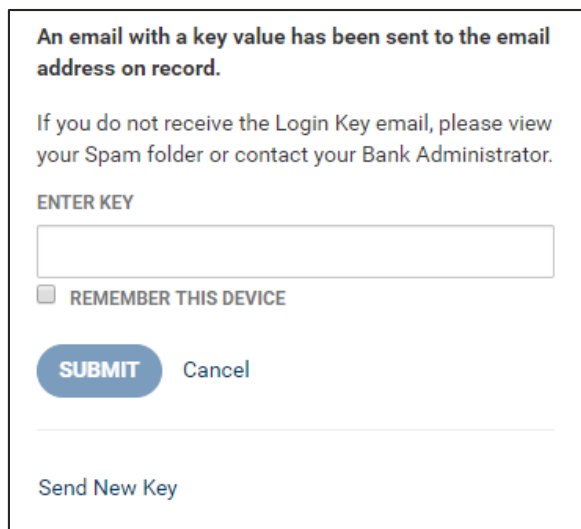
On the login screen enter required information accordingly:



A login form with three input fields and a button. The first field is labeled 'CUSTOMER ID', the second 'USER ID', and the third 'PASSWORD'. Below the fields is a blue button labeled 'Sign In'.

For enhanced security, you will next be asked to retrieve a Login Key sent to your email address on file. If this is not a public or shared device, you can select REMEMBER THIS DEVICE option for future login to bypass the Login Key challenge.

There is also the option to request a New Key to be sent if necessary.



A form for entering a Login Key. It includes a message: 'An email with a key value has been sent to the email address on record.' Below this is a note: 'If you do not receive the Login Key email, please view your Spam folder or contact your Bank Administrator.' There is an input field labeled 'ENTER KEY'. Below the field is a checkbox labeled 'REMEMBER THIS DEVICE'. At the bottom, there is a blue button labeled 'SUBMIT' and a text link 'Cancel'. At the very bottom, there is a text link 'Send New Key'.

Quick Reference Guide – Login

Terms and Conditions, when required by the financial institution, will need to be viewed and accepted. You are provided the ability to email a copy of the Terms and Conditions to your email address on file and to print a copy.

Terms and Conditions

LegalT&C Email Print

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[DECLINE](#) [ACCEPT](#)

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Set up your Security Profile information:

- ① Security Questions (for a forgotten password)
- ② Security Contact Information for login passcode delivery, if required by your financial institution.

In addition to the contact method of email (for future security validation), you can set up additional contact methods – text message and indicate which is the preferred default method.

- ③ Set a new password as the temporary password is no longer valid

① To update your security questions, select 3 questions, type your answers and then Save. Leaving the page without saving will clear current questions and answers.

- Three questions must be selected and answered.
- Answers are not case-sensitive and must be unique.
- Answer should have at least 3 characters.
- Special characters are allowed.

Mask Answers

QUESTION 1

In what city did you meet your spouse/significant other? ▾

ANSWER

QUESTION 2

In what city does your nearest sibling live? ▾

ANSWER

QUESTION 3

In what city is your vacation home? (Enter full name of city only) ▾

ANSWER

NEXT Cancel

Security Contact Information
For Passcode Delivery

TEXT MESSAGE

EMAIL ADDRESS

DemoAdmin@demobank.com [Remove](#) [Make Default](#)

NEXT [back](#) Cancel

③

NEW PASSWORD

REPEAT NEW PASSWORD

- ✘ The password is required, all characters are allowed.
- ✘ Password cannot contain Customer ID, or User ID.
- ✘ Length must be between 6 and 24 characters
- ✘ The password fields must match

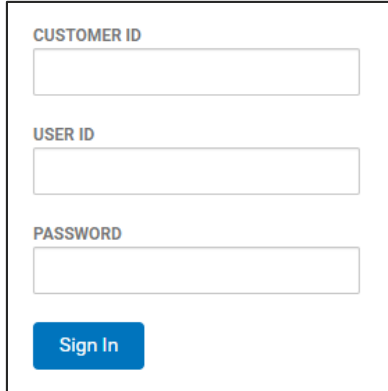
COMPLETE **BACK** Cancel

Hereafter, you are logged in and Home page displays.

Quick Reference Guide – Login

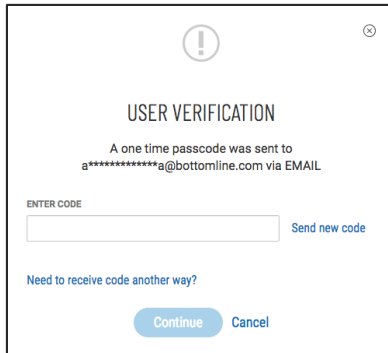
Signing in as a returning user

Enter your Customer ID, User ID and Password:



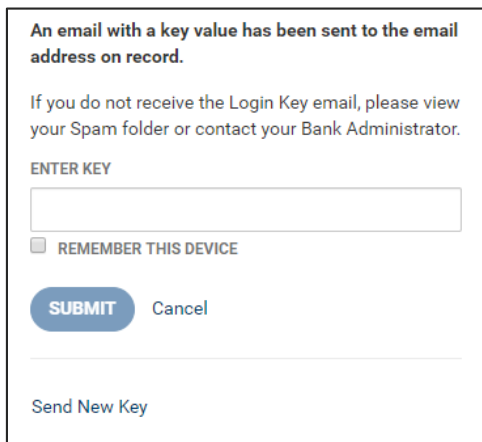
A login form with three input fields and a button. The fields are labeled 'CUSTOMER ID', 'USER ID', and 'PASSWORD'. Below the fields is a blue button labeled 'Sign In'.

Depending your financial institution's requirement, you may also need to retrieve a One Time Passcode:



A user verification screen with a warning icon at the top. The text reads 'USER VERIFICATION' and 'A one time passcode was sent to g*****@bottomline.com via EMAIL'. Below this is an 'ENTER CODE' input field with a 'Send new code' link. At the bottom, there is a 'Need to receive code another way?' link and two buttons: 'Continue' and 'Cancel'.

If you are using a device that has not previously been set in the designation to "REMEMBER THIS DEVICE", you will be prompted to retrieve a Login Key from your email address on file.



A screen for entering a login key. It starts with the text 'An email with a key value has been sent to the email address on record.' followed by instructions: 'If you do not receive the Login Key email, please view your Spam folder or contact your Bank Administrator.' Below is an 'ENTER KEY' input field, a checkbox for 'REMEMBER THIS DEVICE', and two buttons: 'SUBMIT' and 'Cancel'. At the bottom, there is a 'Send New Key' link.

Hereafter, you are logged in and Home page displays.

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Forgot password self help

In the event that you cannot remember your password, fill in your Customer ID and User ID then click on the Forgot Password link in the Sign In box. You will be asked to provide correct answers to previously established Security Questions. A temporary password will then be sent to your email address on file. You will be prompted to set a new password immediately after log-in. This temporary password must be used same day.

CUSTOMER ID

USER ID

PASSWORD

SIGN IN [Forgot Password?](#)