

Onsite Banker Plus

Quick Reference Guide



Login

Signing in for the first time

Some alert types are general, not related to any particular bank account. For example, you might want to be notified when any ACH Payment requires approval.

The majority of alert types are account-specific: they are keyed to actions or situations in particular accounts. For example, you might want to be notified when checks clear against an Accounts Payable account, or perhaps against several accounts that require close monitoring.

The screen for every account-specific alert uses the same control to let you select one or more accounts:

A screenshot of a login form. It contains three input fields: 'CUSTOMER ID', 'USER ID', and 'PASSWORD'. Below these 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 by-pass the Login Key challenge.

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

A screenshot of a 'Login Key' challenge screen. It displays the message: 'An email with a key value has been sent to the email address on record.' Below this, it says: '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 input field is a checkbox labeled 'REMEMBER THIS DEVICE'. At the bottom, there is a blue 'SUBMIT' button and a 'Cancel' link. At the very bottom, there is a link that says 'Send New Key'.

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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

EmailPrint

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DECLINE

ACCEPT

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Set up your Security Profile information:

1. Security Questions (for a forgotten password)

The screenshot shows the 'Security Questions' setup screen. At the top, there are three tabs: 'Security Questions' (active), 'Security Contacts', and 'New Password'. Below the tabs, the title 'Security Questions' is followed by instructions: 'Please complete all security questions and answers to continue. These questions will be used to validate your identity and provide an extra layer of protection.' Under 'Answer Criteria', there are three bullet points: 'All answers must be unique', 'Answers are not case-sensitive and must be unique', and 'Special characters are allowed !@#%&*~.-_~+=/'. There is a checkbox for 'Mask Answers'. Below this, there are three sets of 'SECURITY QUESTION' dropdown menus and 'ANSWER' text input fields. At the bottom, there are 'NEXT' and 'Cancel' buttons.

2. Security Contact Information for one time passcode delivery, if required by your financial institution.

In addition to the contact delivery method of email, you can set up additional methods – text message and voice. You can indicate which is the preferred default method.

The screenshot shows the 'Security Contact Information' setup screen. At the top, there are three tabs: 'Security Questions', 'Security Contacts' (active), and 'New Password'. Below the tabs, the title 'Security Contact Information' is followed by instructions: 'The default contact details below will be our delivery point to verify your identity or send you important information regarding your account security.' Under 'Contact Detail', there is a box showing 'Email Address' as 'janice.cheung@bottomline.com' with a 'Default' label. Below this, there are two warning messages: 'For extended security, we recommend using a phone number for SMS Delivery.' and 'For extended security, we recommend using a phone number for Voice Delivery.' Each warning has a corresponding 'Add Mobile Number' or 'Add Voice Number' link. At the bottom, there are 'NEXT', 'BACK', and 'Cancel' buttons.

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

The screenshot shows a three-step progress bar at the top: 'Security Questions' (completed), 'Security Contacts' (completed), and 'New Password' (current step). Below the progress bar, the title 'Create New Password' is displayed. There are two input fields: 'PASSWORD' and 'RETYPE PASSWORD'. Below the input fields, there are five validation rules listed with icons: a blue 'X' for the first rule, and green checkmarks for the others. At the bottom, there are three buttons: 'COMPLETE' (highlighted in blue), 'back', and 'Cancel'.

Security Questions Security Contacts **New Password**

Create New Password

PASSWORD

RETYPE PASSWORD

- ✗ Password requires at least one letter, one number and one special character
- ✓ New Password must be different than the Current Password
- ✓ Password cannot contain Customer ID, User ID or any personal information
- ✗ Length must be between 6 and 8
- ✓ The password fields must match

COMPLETE back Cancel

Hereafter, you are logged in and Home page displays.

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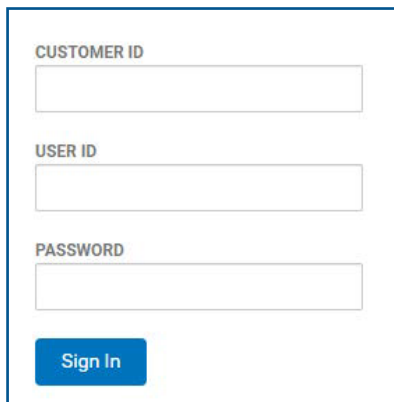
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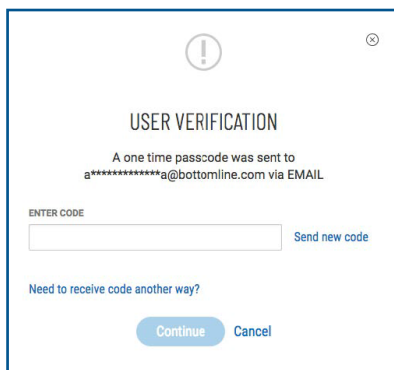
Signing in as a returning user

Enter your Customer ID, User ID and Password:



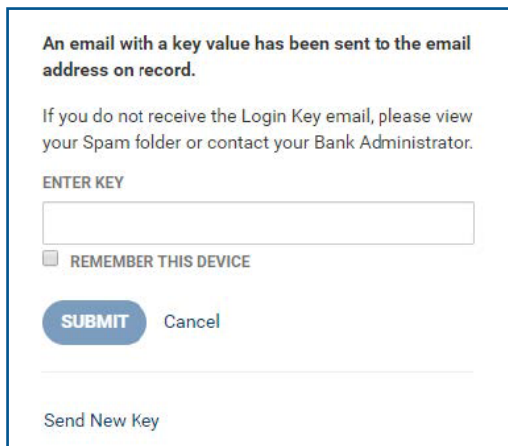
A login form with three input fields: 'CUSTOMER ID', 'USER ID', and 'PASSWORD'. Below the fields is a blue 'Sign In' button.

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. It says 'USER VERIFICATION' and 'A one time passcode was sent to a*****a@bottomline.com via EMAIL'. There is an 'ENTER CODE' input field and a 'Send new code' link. At the bottom, it asks 'Need to receive code another way?' with 'Continue' and 'Cancel' buttons.

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 retrieving a login key. It says 'An email with a key value has been sent to the email address on record.' and 'If you do not receive the Login Key email, please view your Spam folder or contact your Bank Administrator.' There is an 'ENTER KEY' input field, a 'REMEMBER THIS DEVICE' checkbox, a 'SUBMIT' button, and a 'Cancel' link. 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?](#)

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Contact Information



Electronic Services

1-800-829-8629

www.westamerica.com/business/onsite-banker-plus/upgrade-resources/

