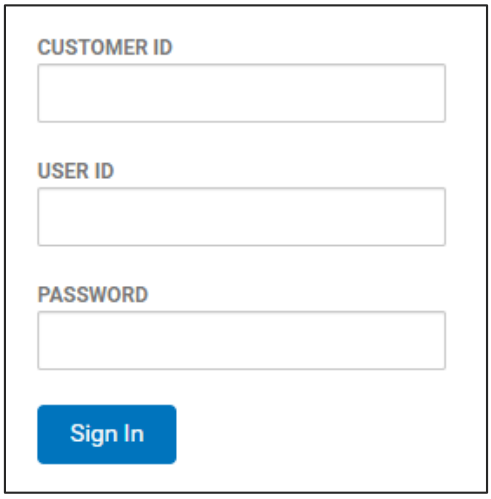
Quick Reference Guide – Login

Signing in for the first time

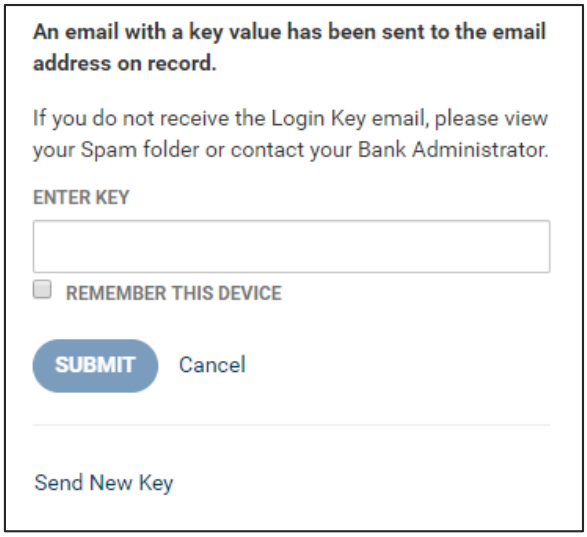
You will need a Customer ID, a User ID and a Temporary Password to log into the application. Your Customer ID and User ID are delivered to you directly by an administrator. You may receive your temporary password via a system generated mail to your email address on file or directly from your company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

On the login screen enter required information accordingly:



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.



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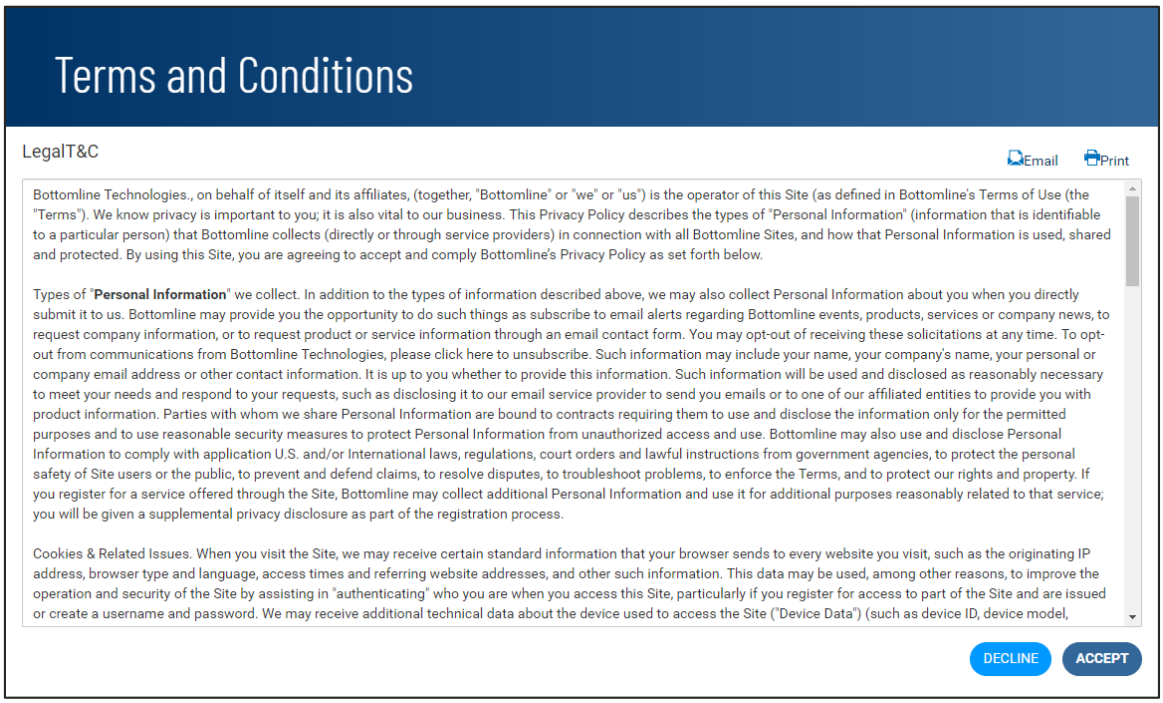
Quick Reference Guide – Login

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.



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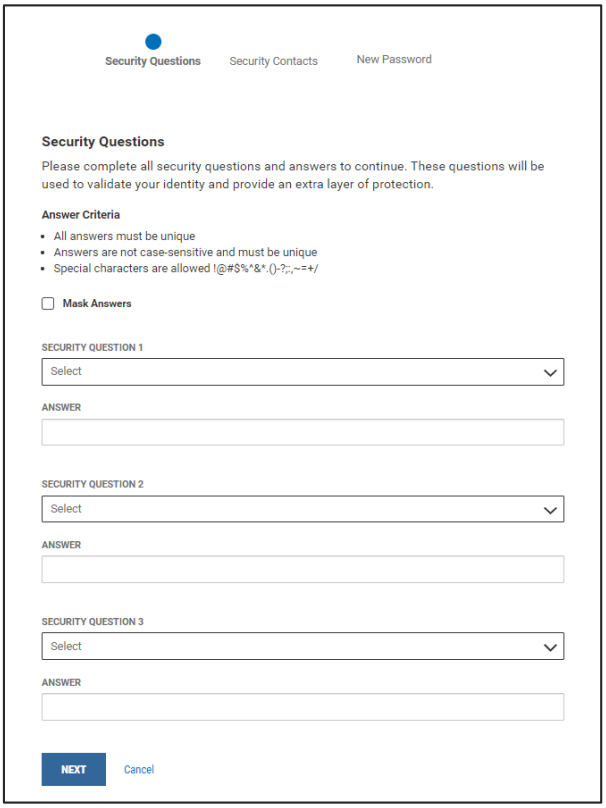
Quick Reference Guide – Login

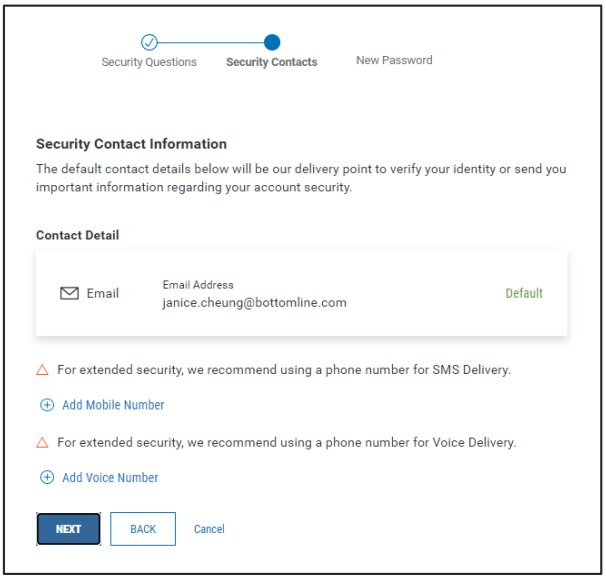
Set up your Security Profile information:

① Security Questions (for a forgotten password)



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.



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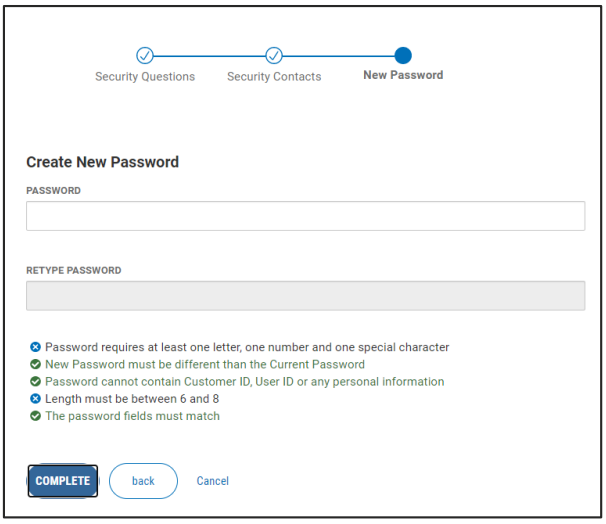
③ Set a new password as the temporary password is no longer valid



Hereafter, you are logged in and Home page displays.

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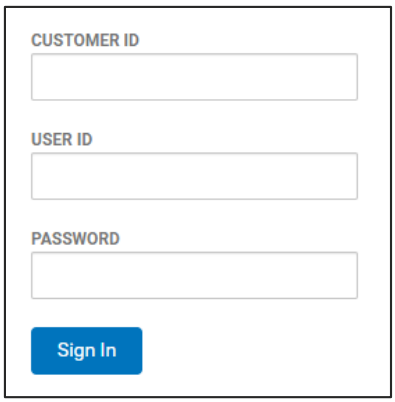
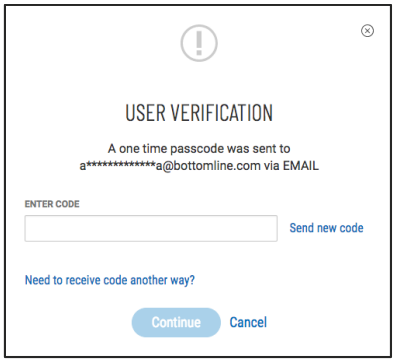
Quick Reference Guide – Login

Signing in as a returning user

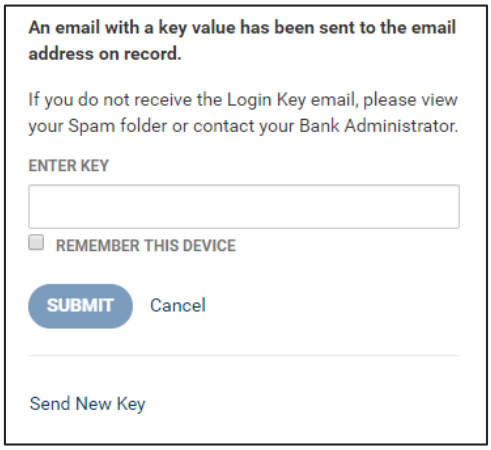
Enter your Customer ID, User ID and Password:



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



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.



Hereafter, you are logged in and Home page displays.

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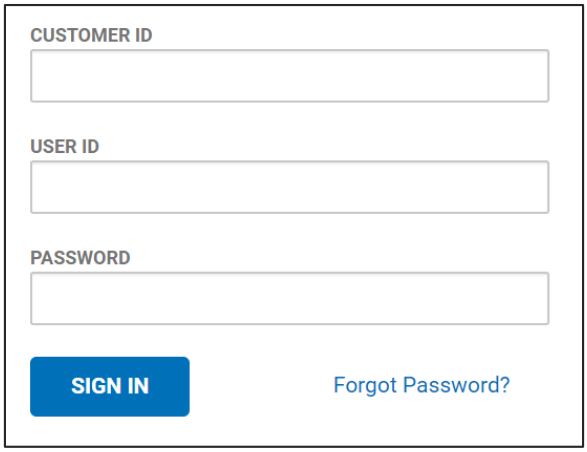
Forgot password self help

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.



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