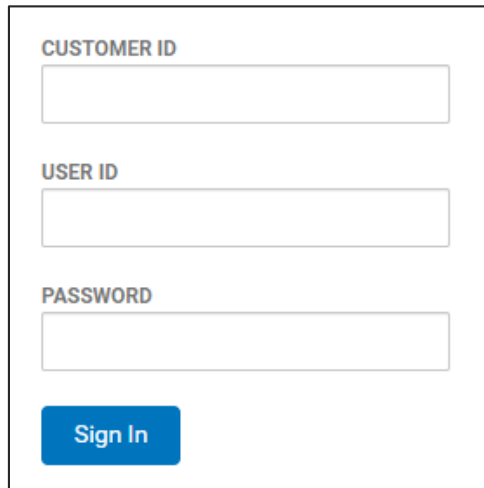


## Quick Reference Guide – Login

### 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.

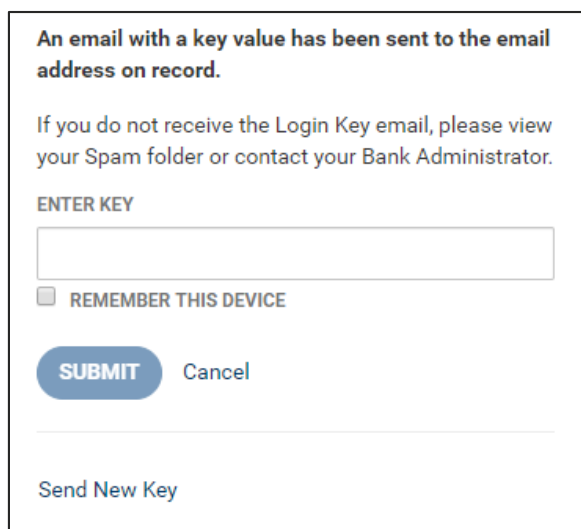
On the login screen enter required information accordingly:



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 are two buttons: 'SUBMIT' and 'Cancel'. Below the buttons is a link labeled '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**

# Quick Reference Guide – Login

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 heading 'Security Questions' is followed by a paragraph: '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.' Underneath, there is a section for 'Answer Criteria' with three bullet points: 'All answers must be unique', 'Answers are not case-sensitive and must be unique', and 'Special characters are allowed !@#%\*&\*.()~?;,-=+/'. A checkbox labeled 'Mask Answers' is present and unchecked. The form contains three identical question blocks. Each block has a dropdown menu labeled 'SECURITY QUESTION 1', '2', or '3' with 'Select' as the current selection, and a text input field labeled 'ANSWER'. At the bottom, there are two buttons: 'NEXT' and 'Cancel'.

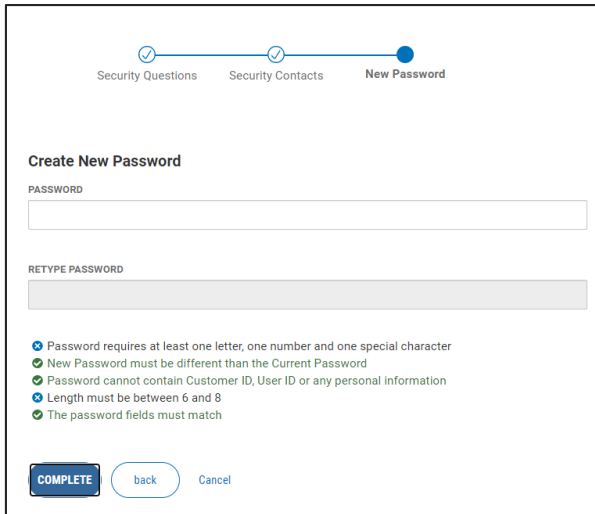
② Security Contact Information for one time passcode delivery, if required by your financial institution.

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 heading 'Security Contact Information' is followed by a paragraph: 'The default contact details below will be our delivery point to verify your identity or send you important information regarding your account security.' Underneath, there is a section for 'Contact Detail' with a table-like structure showing 'Email' as the selected method, with the address 'janice.cheung@bottomline.com' and 'Default' as the status. Below this, there are two warning messages with triangle icons: '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 three buttons: 'NEXT', 'BACK', and 'Cancel'.

## Quick Reference Guide – Login

- 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' (checked), 'Security Contacts' (checked), and 'New Password' (active). Below the progress bar is the 'Create New Password' section. It contains two input fields: 'PASSWORD' and 'RETYPE PASSWORD'. Below the fields are four validation rules, each with a green checkmark icon:

- 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

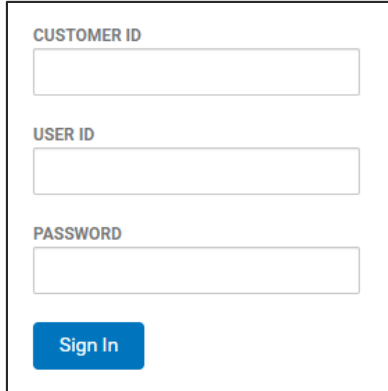
At the bottom of the form are three buttons: 'COMPLETE' (dark blue), 'back' (light blue), and 'Cancel' (light blue).

Hereafter, you are logged in and Home page displays.

# Quick Reference Guide – Login

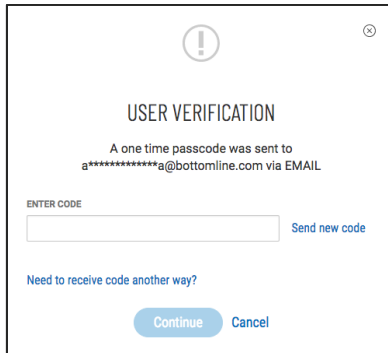
## Signing in as a returning user

Enter your Customer ID, User ID and Password:



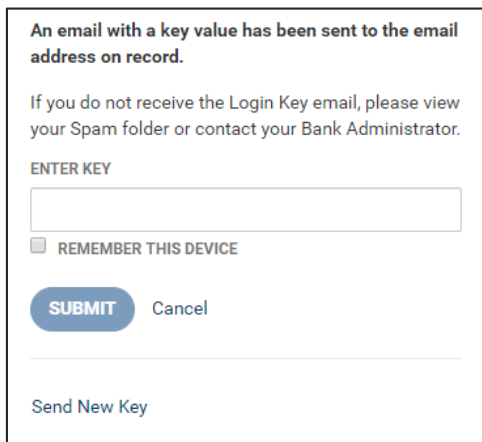
A login form with three input fields and a button. The fields are labeled 'CUSTOMER ID', 'USER ID', and 'PASSWORD'. Below the fields is a blue button labeled 'Sign In'.

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 retrieving 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 'If you do not receive the Login Key email, please view your Spam folder or contact your Bank Administrator.' Below this is an 'ENTER KEY' input field, a checkbox labeled '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.

## Quick Reference Guide – Login

### 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?](#)