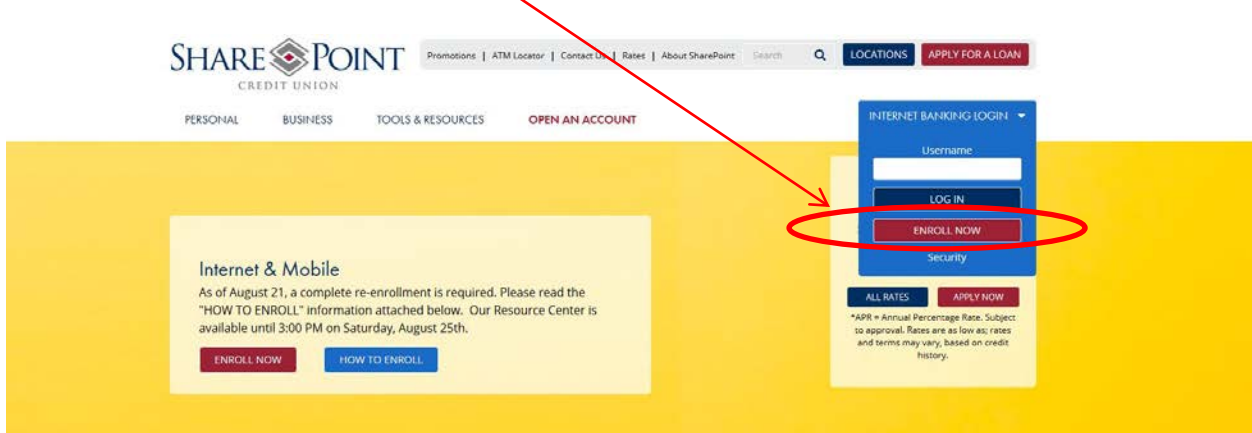


## 1. How do I enroll for my new Internet Banking and Mobile Banking?

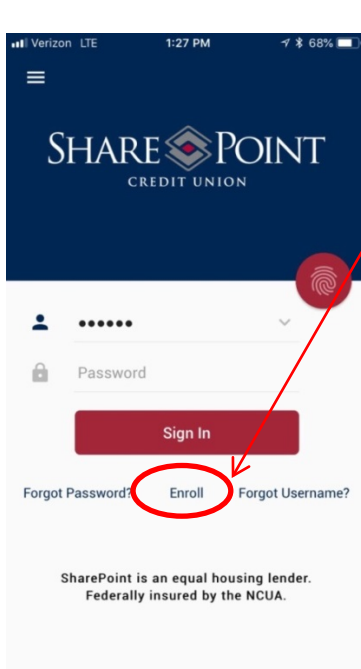
- To enroll, you can visit [sharepointcu.com](http://sharepointcu.com) and click on “ENROLL in Internet Banking”, or download our new Mobile Banking App and click on “Enroll”. Please note, you must UNINSTALL the current Mobile Banking App once you have downloaded the new version. The enrollment button will direct you to our new Internet Banking window and walk you through a five step enrollment process.

Whether you log in on your computer, tablet, or smart phone, Internet Banking will be screen-responsive for any screen, making the enrollment fully functional anytime, anywhere.

### Internet Banking enrollment on Desktop:



### Mobile Banking enrollment on New App:



## **2. What will I have to do to access my new Internet Banking account?**

- Re-enroll in Internet Banking
- Change your Username and Password
- Update your Challenge Questions
- Update your Security Phrase and Security Image
- Update your Contact Information

## **3. Can I use an existing Username?**

- No. All Internet Banking users will need to register for the new service. That includes changing your username and password.
  - Usernames must contain:
    - 6-20 characters
  - Usernames cannot contain:
    - Your Social Security Number
    - Your Member Number
    - Your Birthdate

## **4. Can I use an existing Password?**

- No. All Internet Banking users will need to register for the new service. That includes changing your username and password.
  - Passwords must contain:
    - 8-20 characters
    - At least one lowercase
    - At least one uppercase
    - At least one number
  - Passwords cannot contain:
    - Your Social Security Number
    - Your Member Number
    - Your Username
    - Your Birthdate

**You will need to validate your registration by going to a link that is included in the authentication email. If your email address is incorrect, call us to correct at (952) 930-0700.**

**5. In the enrollment process, you will see:**

- Step 1: Identity Establishment
  - Enter consumer user information and continue
- Step 2: Identity Verification
- Step 3: Contact Information
  - Ensure your email address is correct
  - Edit or confirm your mobile number
- Step 4: Login Information
  - Create a Username
  - Create a Password
  - Create a Security Phrase (a phrase you will recognize going forward)
  - Select a Security Image (an image you will recognize going forward)
- Step 5: Confirmation
  - Accept the Terms and Conditions

**6. Why is the new system asking me to choose a security image and phrase?**

- You will need to choose a new security image, a security phrase, and answer security questions the first time you log into your account on a new device. This is another form of security to protect your financial information.

**7. Who do I contact if I have questions or issues signing in for the first time?**

- Have you re-enrolled? Every Internet and Mobile Banking user must re-enroll the first time logging in.
- You can email [memberservices@sharepointcu.com](mailto:memberservices@sharepointcu.com)
- Or, if you continue to experience issues, you can call our Resource Center at: (952) 930-0700, and choose Option 4 for Account Services.

**8. Will I still be able to use my iPhone or Android Mobile App?**

- Your current Mobile App will prompt you to download your NEW Mobile Banking app. Once you have downloaded the NEW app, you can delete your current app. Once you re-enroll, you will use this Username and Password going forward to log in.
- **The NEW Mobile Banking App Icon (see below):**



**9. Will my online information look different when I sign in for the first time?**

- Yes. The new Internet Banking system is a more intuitive, modern, screen-responsive, and member-focused system. The consolidated account view allows you to see all of your accounts on one screen, with the ability to customize views and more.

**10. You can expect to see these great features upgraded:**

- SharePoint Visa Credit Card history and payment options
- Overview of your accounts
- Check balances
- View transaction history
- View check images
- Transfer funds or make loan payments
- eStatements
- Send us a secure message
- Set account alerts
- Stop check payments
- Apply for a loan
- Open an Account
- Order checks

**11. What has changed in the new online banking that allows me to manage my money more efficiently?**

- The new, intuitive navigation provides quick access to account information, transfers and payments, statements and more!

**12. You will benefit from many new enhancements, including:**

- New Menu buttons to improve navigation
- Touch ID login to enhance security and allow for a quick sign in (*Mobile App*)
- Friends and Family feature allows members to grant subuser access to other individuals of their choice (*Internet Banking*)
- Seamless integration with Mobile & Internet Banking platforms
- Modern, intuitive, screen-responsive site allows you to view on any device
- Track spending habits with enhanced financial tools
- Greater account detail, including Visa Credit Cards

**13. Will I need to set up by Payees again in BillPay?**

- No. you will not need to set up your Payees again; these will convert over with the new Internet Banking.

**14. If I have automated transfers or recurring payments that I initiated in the old Internet Banking, will I have to set them up again?**

- Yes. If you have set up automated transfers or recurring payments, you will have to set those up again manually.

**15. Do I need to re-enroll in eStatements?**

- No. You will not have to re-enroll. However, you will have to agree to the new Terms & Conditions the first time you log into eStatements.

**16. How do I enroll in eStatements?**

- In order to opt out of paper statements, or continue receiving eStatement notifications, you will have to agree to the new Terms & Conditions.
- Simply follow these steps:
  - Log in to your NEW Internet Banking account
  - Click “eStatements” on the left side menu
  - Check “I accept terms and conditions”
  - Click “Continue”
  - You’re all set! Once you are enrolled, your paper statements will automatically stop.


**17. Where can I find my Person To Person Payments?**

- Click on “BillPay” on the left side menu.

**18. Why didn’t my account nicknames carry over?**

- Some of the information from our old Internet Banking system (*such as account nicknames*) could not be transferred.

**19. Can I assign nicknames to my accounts?**

- Yes. Click on the specific account you would like to rename. In the left hand side, click on the  button.

**20. How will I access my SharePoint Credit Card transactions?**

- You can click on “Credit Card” on the left side menu in Internet Banking. On Mobile Banking, your Credit Card account should be listed on the main menu with the rest of your accounts.

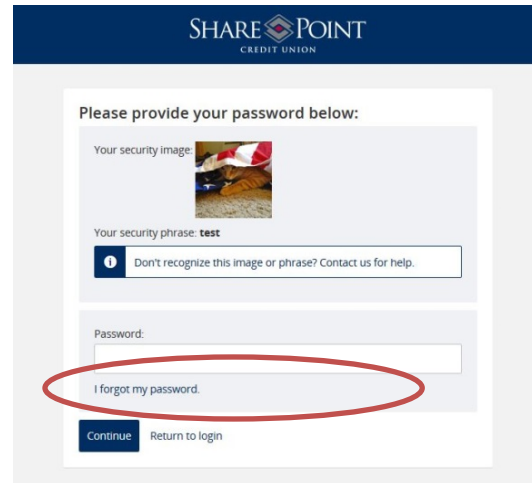
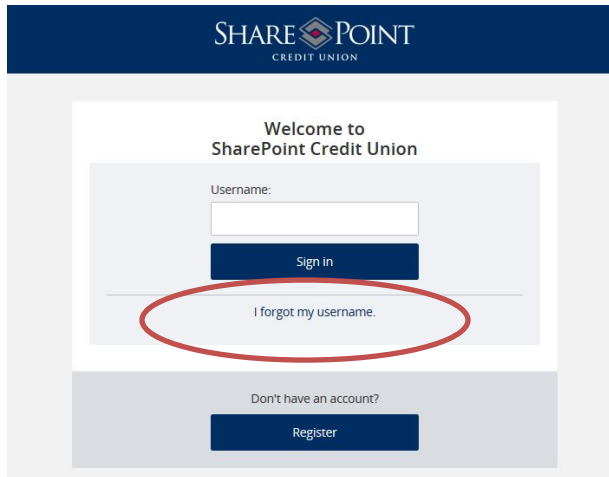
**21. How can I customize my sign in and profile settings?**

- Click “Settings” on the left side menu
- Click “Login Settings”
- There you can choose to change your Username, Password, or security information.

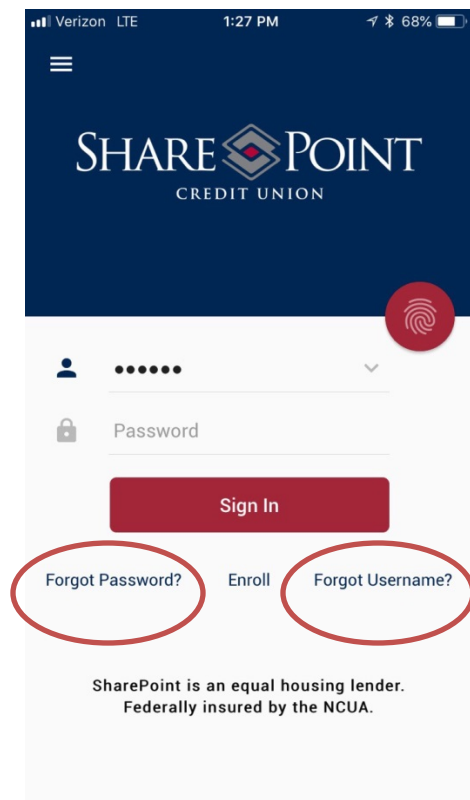
## 22. How do I gain access if I get locked out?

- The system will lock you out as a security measure after 4 failed sign in attempts. If you are experiencing issues and/or cannot remember your Username/Password, you can reset them by choosing “I forgot my Username” or “I forgot my password”. (See below)

### Internet Banking:

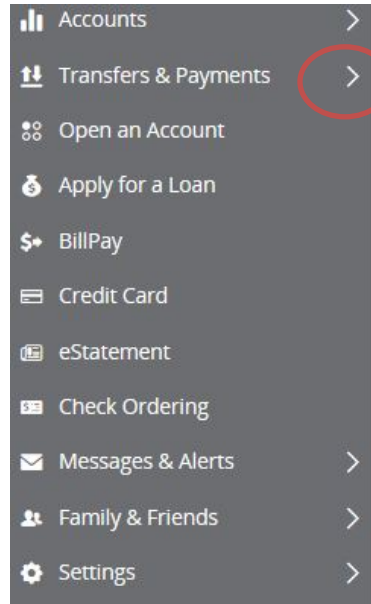


### Mobile Banking:



**23. There are some areas that should open a drop down and I can't figure out how to see the information. What should I do?**

- In this new Internet Banking system, there are navigation arrows that will expand and collapse menu items. *(See below)*



**24. Can I track my spending?**

- Yes. There are graphs within the account overview to help you manage and track your spending.

**25. The NEW Mobile App has the Finance Manager, which allow you to:**

- View your Cash to Debt Ratio
- Manage Expenses in Categories
- Create Budgets, categorizing your purchases
- View a Daily Cash Flow Agenda
- Create Goals to allocate money for a specific reason over a set period of time
- View your Net Worth and Assets

**26. The NEW Internet Banking has the Friends and Family feature, which allows users to grant subuser access to transfer money, view balances, etc. Currently, you may only add other members of SharePoint Credit Union.**

- To add a new user, follow these steps:
  - Go to Family and Friends > Add a User
    - Step 1: Set Account Permissions
    - Step 2: Transfers & Payments
    - Step 3: Additional Permissions
    - Step 4: Confirmation

**27. Will I still be able to view check images?**

- Yes. Simply follow these steps:
  - Click on “Accounts” navigation arrow
  - Click “History”
  - Click “View all Transactions”
  - Click on the check of choice
  - The check image will appear, and you will have the option to Print or Close the box. ***Only 6 months of checking account history will show in History, so please print copies of important checks to refer back to if needed.***

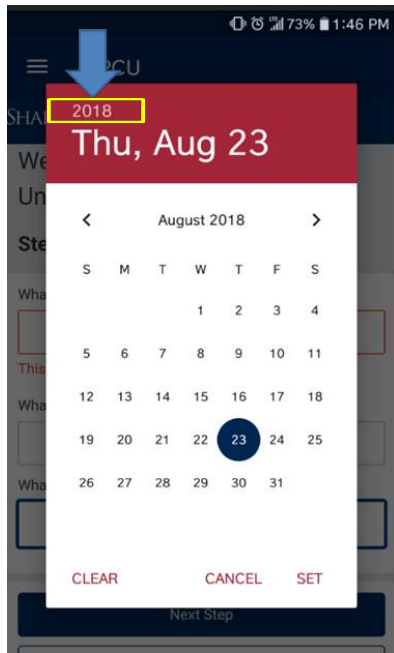
**28. How can I stay informed of account sign ins, password changes, deposits, transactions and balances on my account?**

- You can stay informed with Alerts. Simply follow these steps:
  - Click “Messages & Alerts” on left side menu
  - Click “Manage Alerts”
  - You can customize the Alert accounts, types, and notifications you receive.

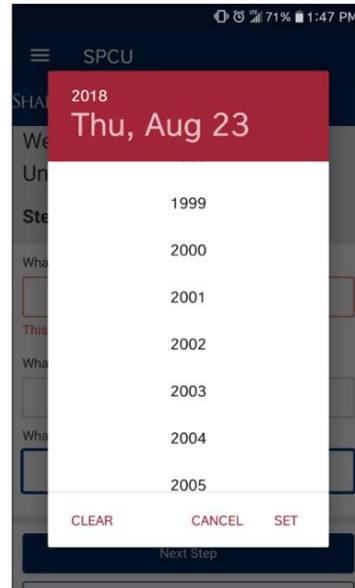


## How to choose your birthdate on an Android device.

1. Click on the year at the top of the screen.



2. Scroll back to birth year (typically by swiping down)



3. Once in the correct birth year, scroll back to the correct month and select the day.

