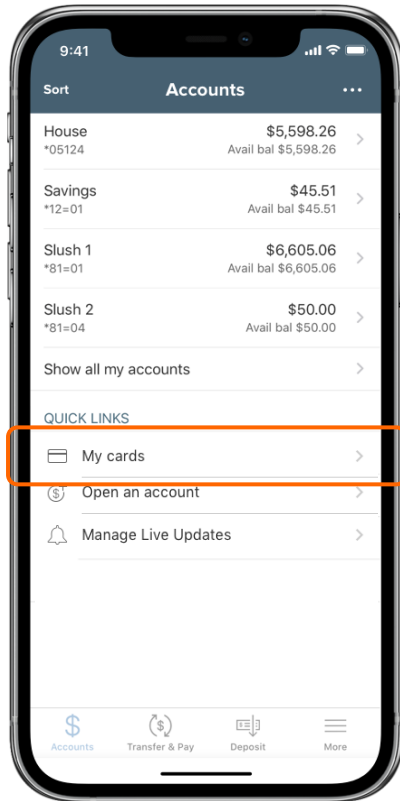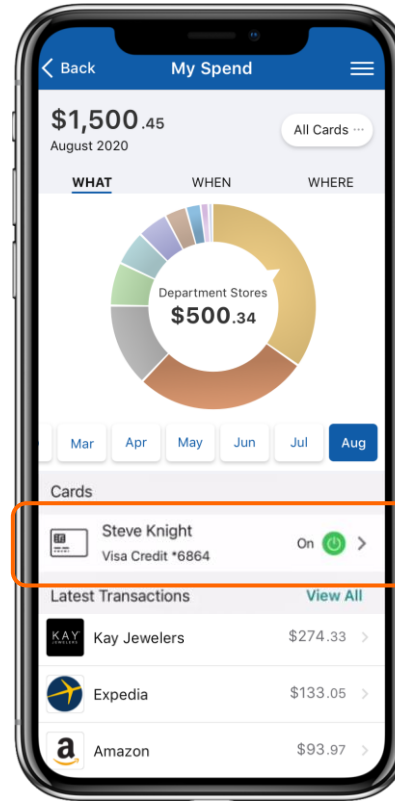# MOBILITI™ WITH CARD MGT CHEAT SHEET

Users now have powerful tools to manage their cards anytime, anywhere from mobile banking
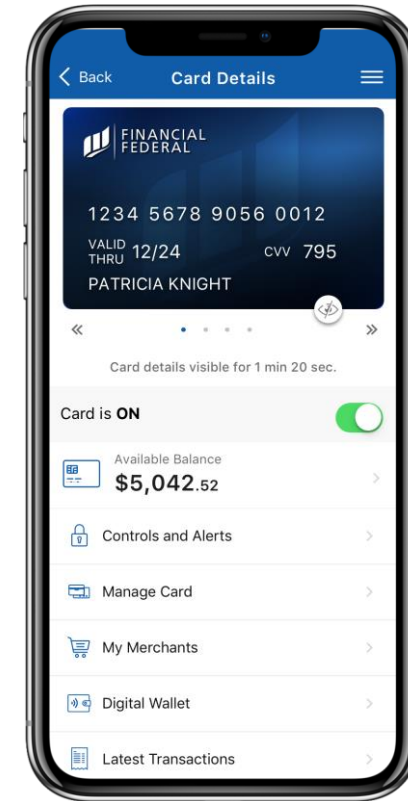
Getting started with card management

After logging in to your mobile banking app, you will be taken to the Accounts screen. Tap "**My cards**" to get started.

You will be brought to your card controls dashboard. Here you **can view your spending, transactions by type, date and location**, as well as a **list of your cards, most recent purchases, and a shortcut to your digital wallet**. Tap your card from the list to manage it and view more details.
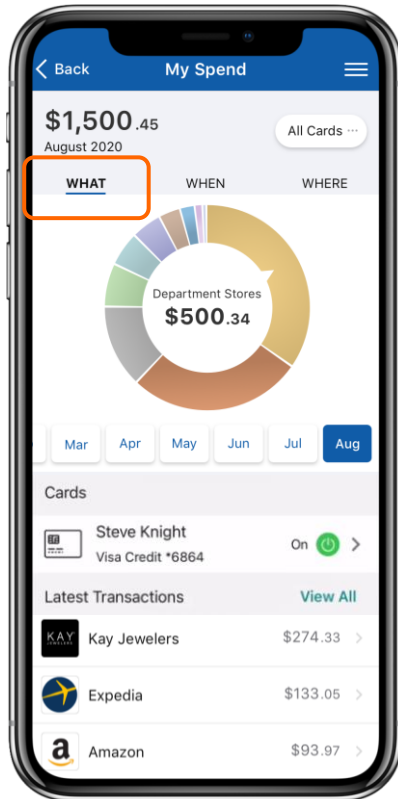

Here you can **turn the card on or off, configure controls and alerts, manage the card, see stored merchants, and view your latest transactions.** Control of your card(s) has never been so simple!
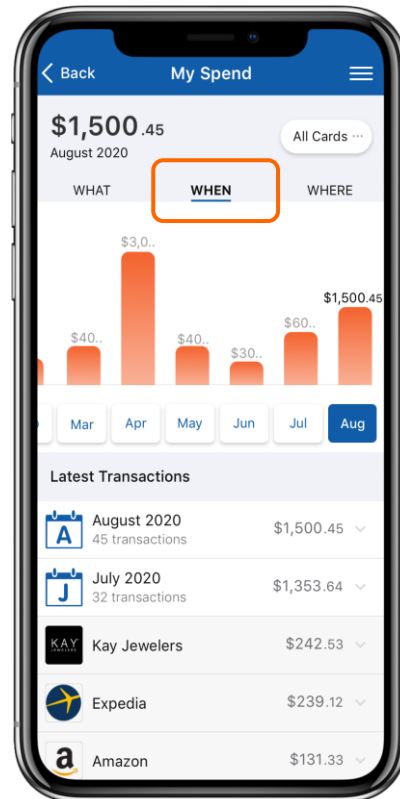
MOBILITI™ WITH CARD MGT CHEAT SHEET

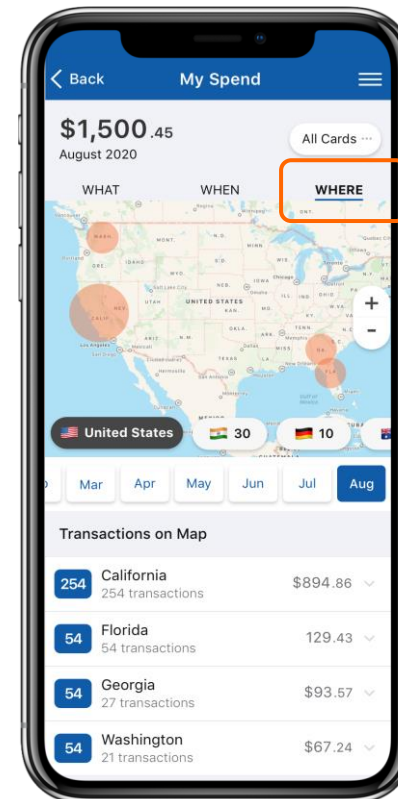## Users now have powerful tools to manage their cards anytime, anywhere from mobile banking
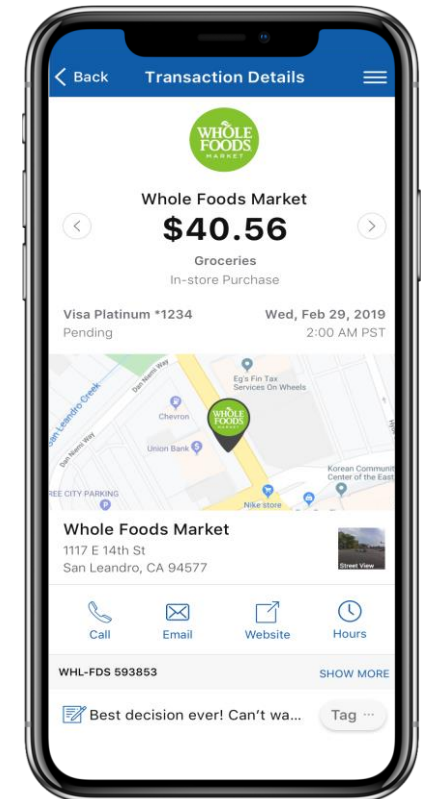
Viewing spend insights

From the card controls dashboard, you can gain insights into your spending habits on your cards. The screen above shows a breakdown of your **spending by category** under the "What" section.

By tapping "**When**", you can also view your **spending by day(s) and month(s)** to see trends in your spending habits.

By tapping "**Where**", you can view the **location** of your transactions on a map.
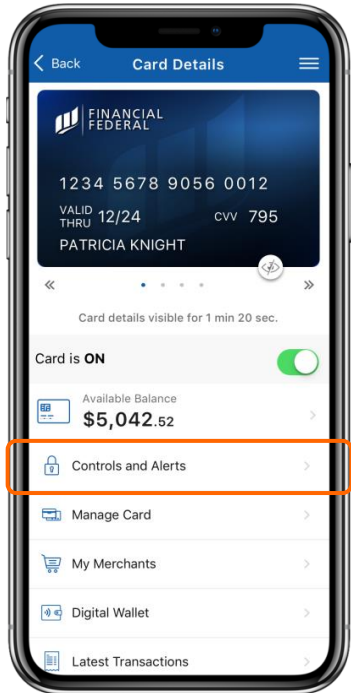
When you tap on a transaction, you can view the **merchant's name, logo, address, phone number, and exact location**! If you don't recognize a purchase, you can touch base with the merchant using the information provided.
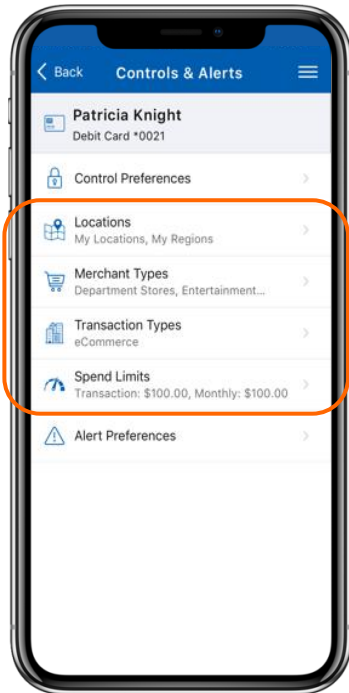
Screenshots are for illustrative purposes only. Exact functionality may vary by financial institution.

MOBILITI™ WITH CARD MGT CHEAT SHEET

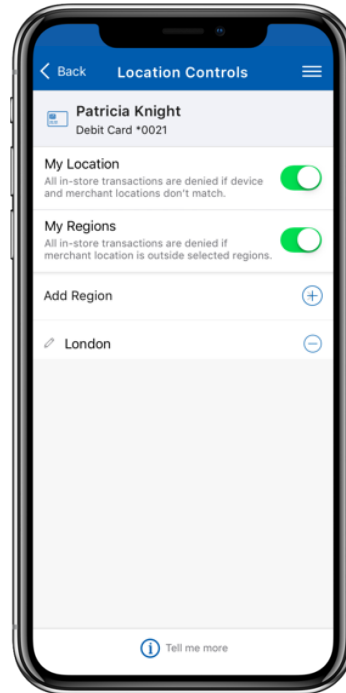## Users now have powerful tools to manage their cards anytime, anywhere from mobile banking
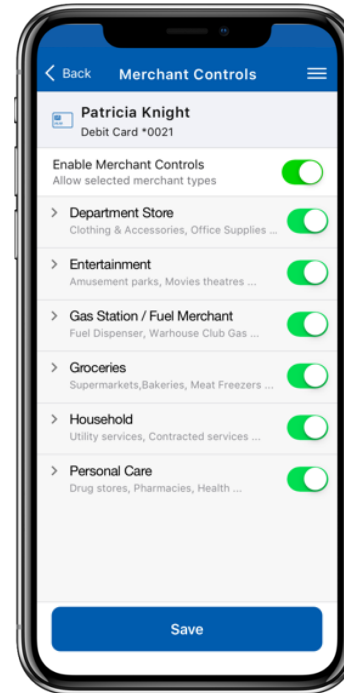
Setting up card controls

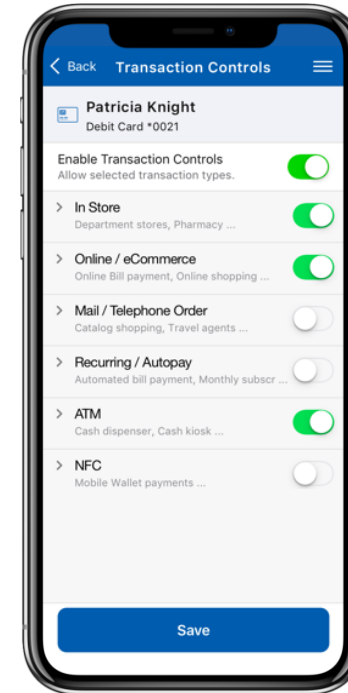To access card controls and alerts, tap "**Controls and Alerts**" under the Card Details menu.

Depending on the card control feature you'd like to enable, tap on either "**Locations**", "**Merchant Types**", "**Transaction Types**", or "**Spend Limits**".
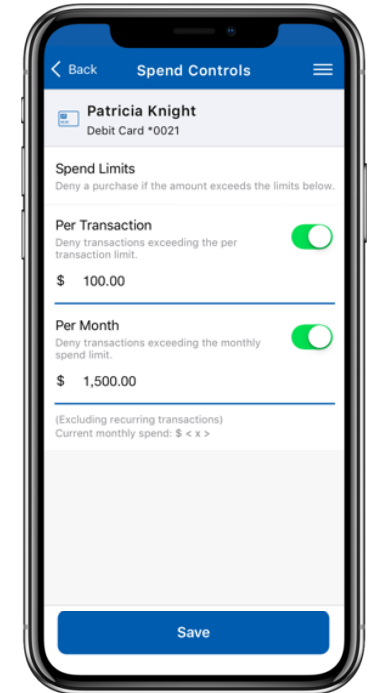
Under Location Controls, you can enable "**My Location**" which will check if you are in the vicinity of the merchant where the card is being used, and "**My Region**" for geographic boundaries. If the in-person transaction meets all your control preferences, it will go through!

Under Merchant Controls, you can select which **merchant types** are allowed for transactions on your card. To enable or disable a merchant type, toggle the green switch to the right of the merchant type and tap "Save".

Under Transaction Controls, you can select which **transaction types** are approved for your card (e.g., in store, online, and autopay). To enable or disable a transaction type, toggle the green switch to the right of the transaction type and tap "Save".
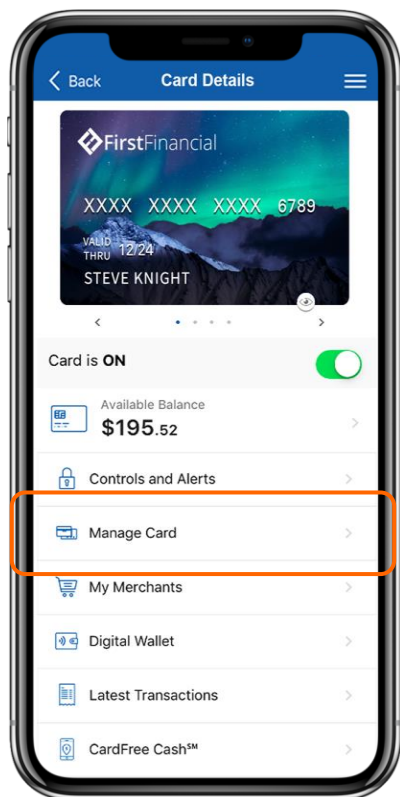
Under Spend Controls, you can cap your spending to stay on budget by setting your transaction and **spending limits**. Simply toggle the green switch next to the control, enter the amount, and tap "Save"!
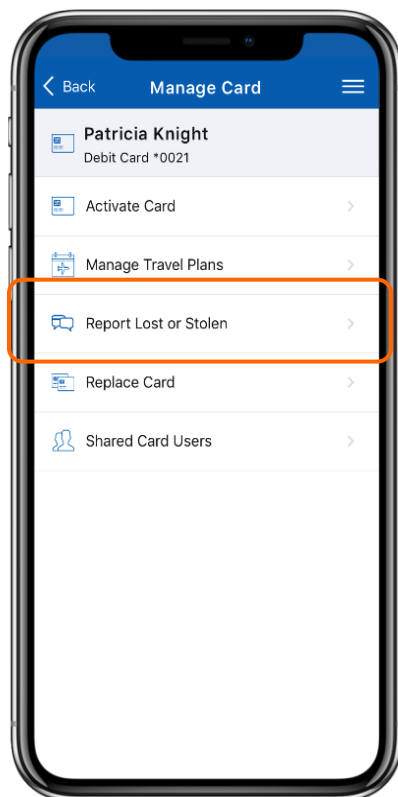
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MOBILITI™ WITH CARD MGT CHEAT SHEET

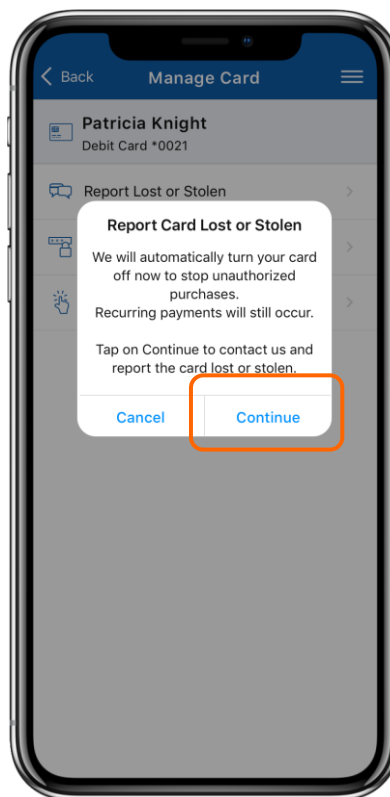## Users now have powerful tools to manage their cards anytime, anywhere from mobile banking

Reporting a lost or stolen card

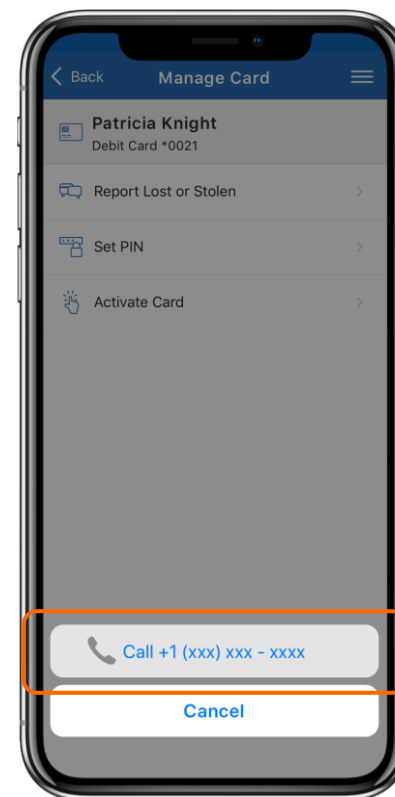
If your card goes missing, there is no need to panic! Simply tap "**Manage Card**" under the Card Details menu of the card that's gone missing.
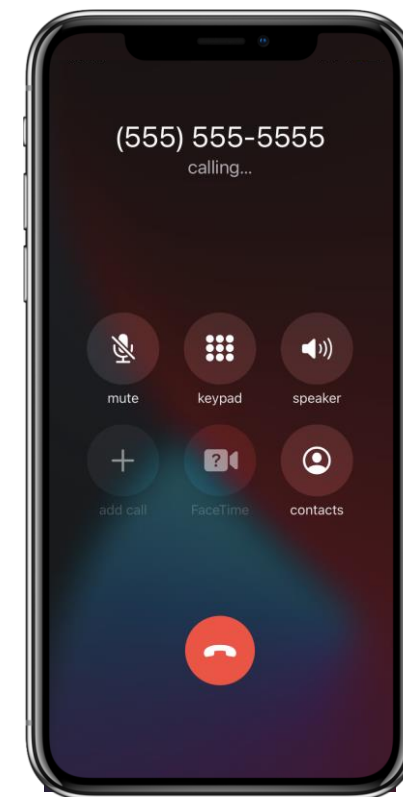
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Tap "**Report Lost or Stolen**".

You may need to specify whether the card was lost or stolen and add additional notes. Tap "**Continue**" to disable your card and have a replacement card sent your way.

After tapping "Continue", you will be prompted to call our customer service line for assistance. Simply tap our phone number to get everything squared away!
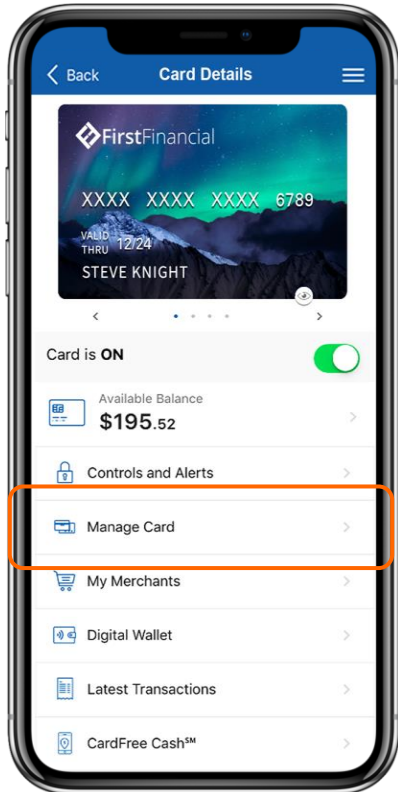
By calling us straight from your mobile app, this ensures a smooth and seamless user experience. Losing a card can be stressful, but with card management – you can stay in control!
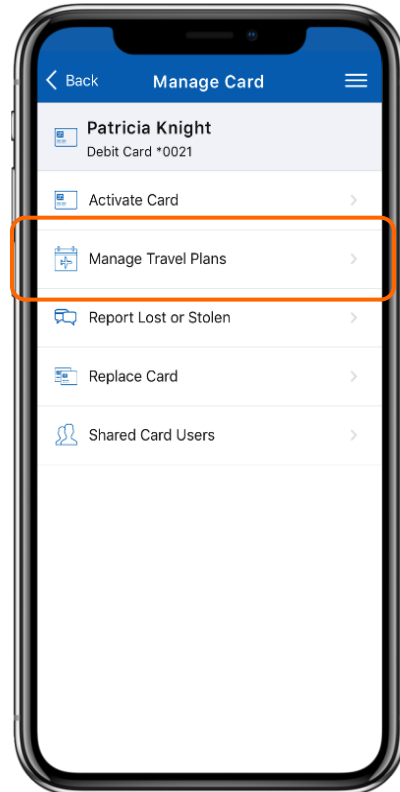
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Users now have powerful tools to manage their cards anytime, anywhere from mobile banking
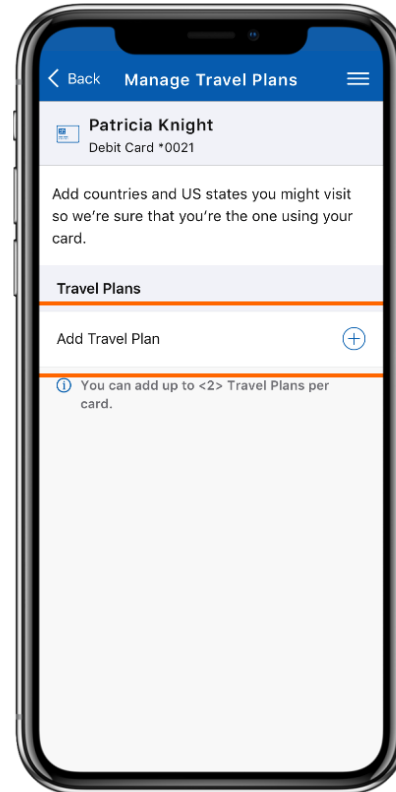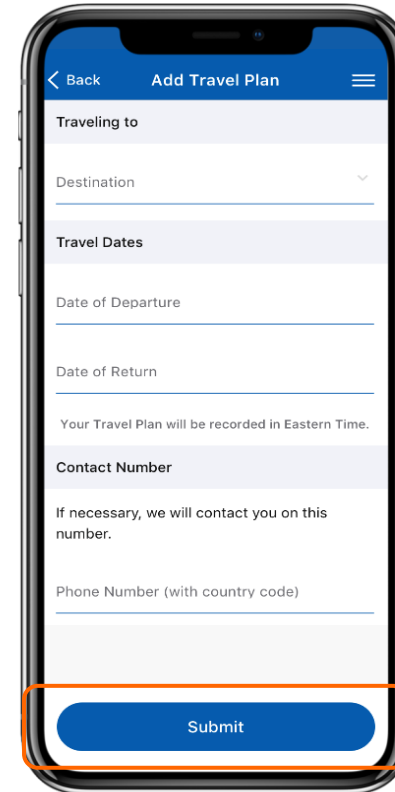
Adding travel plans

To add upcoming travel plans, tap "**Manage Card**" under the Card Details menu.
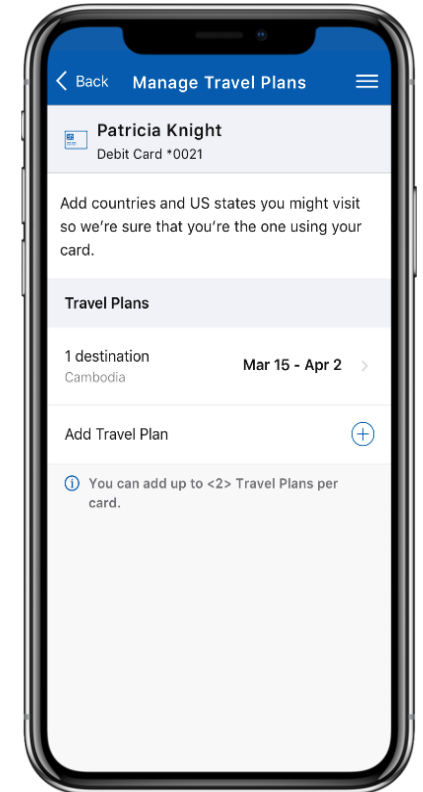
Tap "**Manage Travel Plans**" to continue.

Tap "**Add Travel Plan**" to add countries and U.S. states you may visit to ensure you can use your card without interruption and worry-free while traveling.

Enter your destination, date of departure and return, a preferred contact number, and tap "**Submit**".
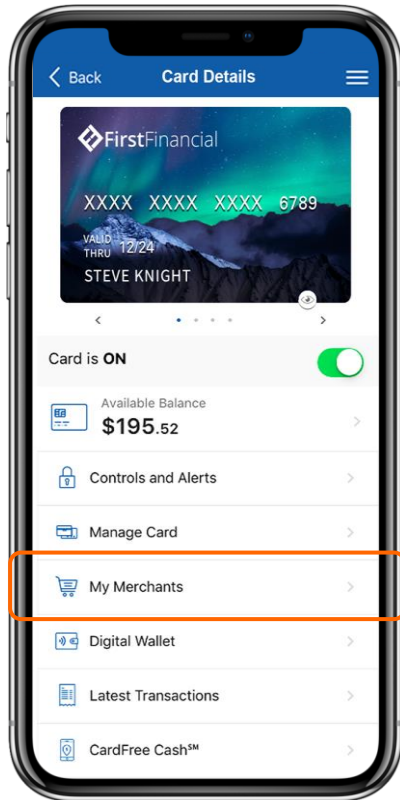
Once you've submitted your travel plan, it will display on the "Manage Travel Plans" screen. You're all set and ready to travel without a worry!
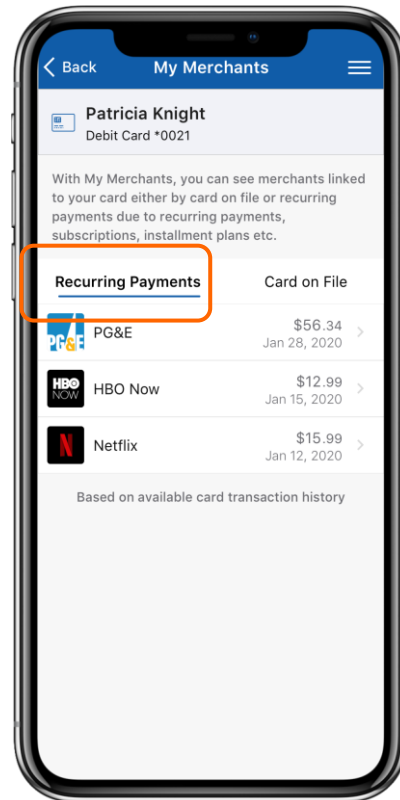
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MOBILITI™ WITH CARD MGT CHEAT SHEET

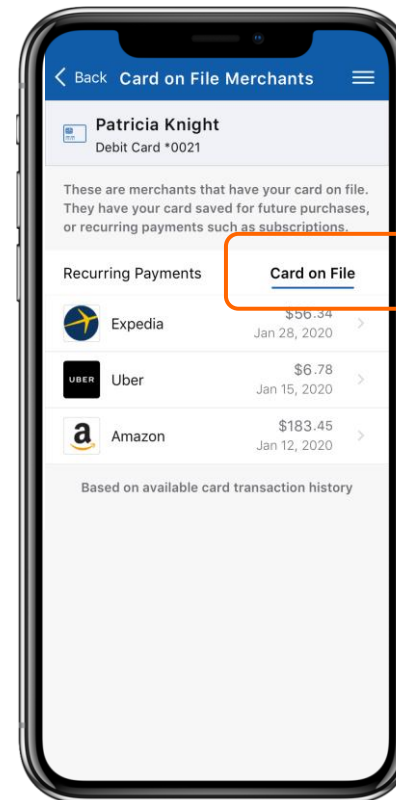## Users now have powerful tools to manage their cards anytime, anywhere from mobile banking

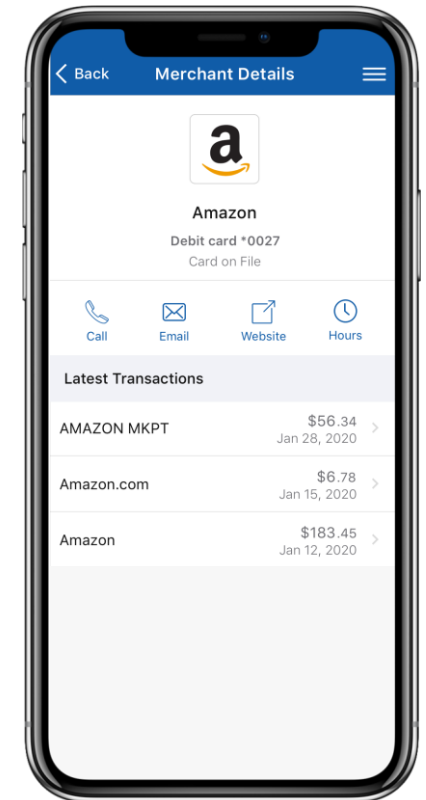Viewing merchants, recurring payments, and your card(s) on file

To see which merchants have stored your card(s), tap "**My Merchants**" under the Card Details menu.

Under "**Recurring Payments**", you can view all the merchants that have your card stored for a subscription service (e.g., video streaming and electrical services).

The "**Card on File**" tab showcases every merchant that has stored your card for future use (e.g., online shopping and ride share services). This ensures that only trusted merchants have your data!
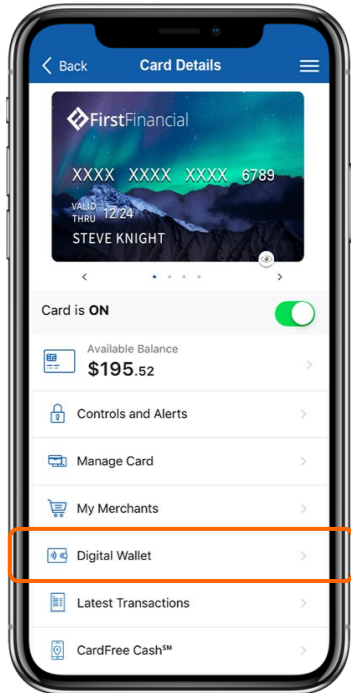

You can tap on a merchant to view "**Merchant Details**" including your latest transactions with the merchant and their contact information so you can quickly get in touch.
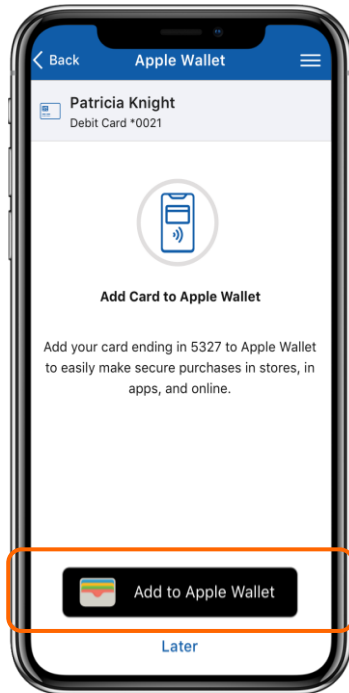
MOBILITI™ WITH CARD MGT CHEAT SHEET

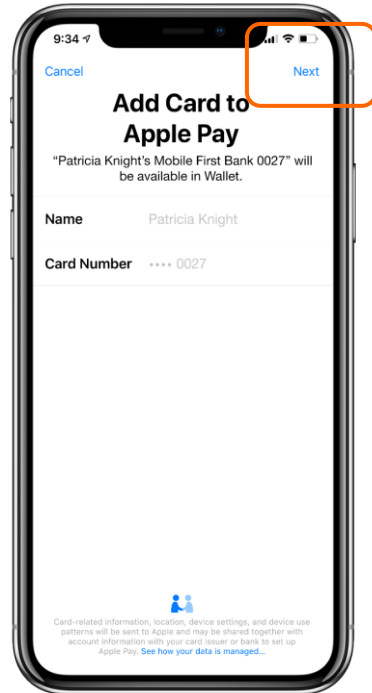## Users now have powerful tools to manage their cards anytime, anywhere from mobile banking

Adding cards to your digital wallet for iOS users

To add a new card to your digital wallet, select the card and tap "**Digital Wallet**" under the Card Details menu.
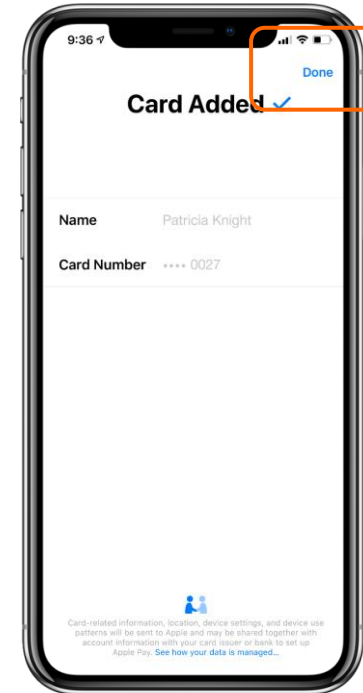
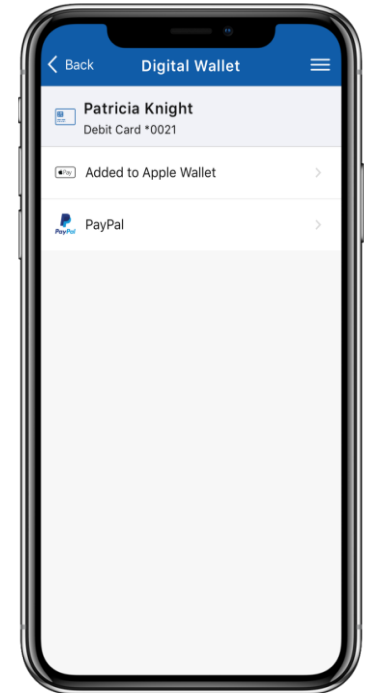For iOS users, tap "**Add to Apple Wallet**".

You will be brought outside of your mobile app to your operating system's interface where your card information is pre-filled. All you have to do is tap "**Next**" to add it to your digital wallet!

To set this as your default card for digital purchases, simply tap "**Use as Default Card**".

Once the card has been added, you'll see a confirmation screen similar to the one above. Tap "**Done**" to return to your mobile app.

Once you've added the card to your digital wallet, you'll see "**Added to Digital Wallet**" under the card you've added. You're all set and ready to use the card in your digital wallet!

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