



**Texas Security Bank** would like to welcome you to our New Digital Banking Platform. To assist with your first day in the system we would like to provide you with some helpful information. For more detailed information, visit our website. Don't worry, if you need a little help, call or email our HELP team at 469-398-4884 or [Help@TexasSecurityBank.com](mailto:Help@TexasSecurityBank.com). Enjoy!

### Commercial Clients:

- Verify that all your accounts are displaying on the home page
- Click on all accounts to ensure the history is showing along with any associated transaction/ check images
- Verify that you can view your account statements
- Reoccurring transfers between accounts will need to be reestablished
- **Very Important** - Due to the differences in the ACH & Wire platform we were not able to import existing templates. We were however able to import the recipient/payee information from those templates. **See information below on Payee Based Payments Platform.**
- **Very Important** - All reoccurring Wire or ACH Transactions will need to be reestablished
- If you are a QuickBooks user, you will need to deactivate/reactivate your online banking connection
- If you are a Bill Pay user, please verify that you can access bill pay Note: there were no changes to the Bill Pay provider so there were no changes with your payees or schedules
- We have replaced the need for Token devices and replaced it with newer "out of band technology" utilizing Secure Access Codes ~ SAC codes. Visit our website for more information
- Check out a few of the new commercial features:
  - Payee based Payments platform – you can now add payees to your payee list and use that information for wires or ach without having to input it every time. You can also set up email notifications for your payees every time you initiate a payment to them. – Located in the Payments menu
  - Link external accounts you have at other financial institutions for easy account to account transfers. – Located in the Services menu
  - Are you an approver for wire and ACH Transactions? Set up your specific approval notifications. – Located in the Settings menu
  - New "Robust" reporting module. – Located in the Services menu
  - Mobile banking w/full functionality now available for commercial clients. Download the app from your device specific app store

*These are just a few of the new and exciting features the system has to offer. We encourage you to dive in and look around. For a one on one demonstration send us an email to [CM@texassecuritybank.com](mailto:CM@texassecuritybank.com) and we will be happy to schedule.*

## Consumer Clients:

- Verify that all your accounts are displaying on the home page
- Click on all accounts to ensure the history is showing along with any associated transaction/check images
- Verify that you can view your account statements
- Reoccurring transfers between accounts will need to be reestablished
- Any account alerts you had established will need to be reestablished
- If you are a Quicken user, you will need to deactivate/reactivate your online banking connection
- If you are a Bill Pay user, please verify that you can access bill pay Note: there were no changes to the Bill Pay provider so there were no changes with your payees or schedules.
- If you are a mobile banking user, you will NOT have to download a new app however you will need to follow the first time login protocol on the mobile app just as you did with the desktop.
- If you used CardValet® to manage your debit cards via the mobile application, you will now need to download the CardValet® standalone app from your device specific app store. If you did not use CardValet® we encourage you to visit our website to learn more about this valuable FREE tool
- Check out a few of our new consumer features:
  - Make fast Person to Person payments, regardless where they bank, via our new P2P feature – located in the transaction menu.
  - Send money easily to other TSB account holders using our new TSB to TSB feature – located in the transaction menu.
  - Take control of your finances with our new “Financial Tools” feature where you can also link accounts from other banks-located at the top of the home page

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