

# Card Management Quick Reference Guide

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# Card Management Quick Reference Guide

# Accessing debits cards in Card Management

 Access Card Management via the Dashboard to view all of your debit cards, or click into your account the debit card is linked to. You will see Card management with your active linked card for that account.



#### **Mobile View**



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### Managing your Debit Card with Card Management

- Use the Toggle to temporarily disable your card. Simply toggle back on to enable.
- Set up Card Alerts and protection (see next page)
- Report a card lost or stolen
- Reorder a card
- Activate a new card

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⊿	Report lost/stolen	
	Reorder card	
ि	Activate new card	





### Managing your Debit Card Alerts and protection

- After selecting *Alerts and protection*, click on *Manage* to manage how to receive notifications for your debit card.
- Use the *Protection options* toggle to get notified on all transactions

< Alerts and MICHAEL S	f protection SMITH (x0000)		
Notification settings Choose which notifications you want and where	you receive them.	Manage	
Protection options Notify me on all transactions			
Locations		>	Notification settings
Merchant types Transaction types	<	Notific MICHAEI	ation settings L SMITH (x0000)
ی Fransaction types	Blocked transac When a transaction	tion alerts n is blocked, a transaction	alert will be sent using the selected methods.
	<ul> <li>In-app mess</li> <li>Email M.Smith@g</li> <li>Text (123) 456-7</li> </ul>	sage Imail.com 890	
	Notification aler When a transaction methods.	<b>ts</b> n has been processed, a no	otification alert will be sent using the selected
	<ul> <li>In-app mess</li> <li>Email</li> <li>M.Smith@g</li> </ul>	sage Imail.com	
	Text (123) 456-76	890	
		Save	Cancel



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### **Managing your Debit Card Alerts and Protection**

- Click Location to select whether you would like to block international transactions or if you'd like to receive a notification when there are any international transactions.
- For Merchant types and Transaction types, choose whether to block or get notified when a transaction is made

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Notification setti Choose which notif	ngs ications you want and where you receive them.	Manage
Protection option Notify me on all tra	<b>15</b> nsactions	
Locations		>
I Merchant ty	pes	>
Transaction	types	>
A Spending lin	nits	>

Merchant type details $\qquad \qquad \qquad$	Transaction type details
Department Store	In Store
Includes clothing, accessories, office supplies, electronics, etc.	Includes department stores, pharmacies, other retail stores, etc.
Entertainment	eCommerce
Includes amusement parks, movie theaters, arcades, etc.	Includes online bill payment, online shopping, etc.
Gas Station	Mail/Phone Order
Includes fuel dispensers, warehouse club gas, etc	Includes catalog shopping, travel agents payments, etc.
Grocery	Recurring
Includes supermarkets, bakeries, butchers, etc.	Includes automated bill payment, monthly expense payments, etc.
Household	ATM
Includes utilities, contracted services like electricians, plumbers and A/C repair, etc.	Includes bank ATMs, vendor ATMs, cash advance, etc.
Personal Care	Other
Includes drug stores, pharmacies, health professionals, etc.	Includes other cases outside of standard types
Restaurant Includes diners, fast-food, cafeterias, etc.	
Travel Includes airlines, car rentals, hotels, etc.	
Age Restricted Includes liquor stores, smoke shops, casinos, adult stores, etc.	
Other	

Purchases at other merchants

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### **Managing your Debit Card Alerts and Protection**

- To set spending limits, select Spending Limits.
- Complete the fields as desired to set transaction spending limits and alerts.
- Complete the fields as desired to set monthly spending limits and alerts.

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	Alerts and protection MICHAEL SMITH (x0000) ngs cations you want and where you receive them. Is isactions

<	MICHAEL SMITH (x0000)
Trar	nsaction limits
	Spending limit Transactions over this amount will be blocked and an alert will be sent.
	\$
	Spending alert Transactions over this amount will send an alert.
	\$
Mor	nthly limits
	Monthly spending limit Transactions that would bring your monthly spending total over this amount will be blocked and ar alert will be sent.
	s
	Monthly spending alert Transactions that would bring your monthly spending total over this amount will send an alert.
	\$
	Save Cancel



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# **Managing your Travel Alerts**

- From the Dashboard Card Management "card", click the three dots in the upper right corner and click the airplane icon (on the mobile app, the Airplane icon will be visible without clicking the dots)
- You may also access it by clicking on your name from the bottom of your menu, go to Settings and select *Travel notices*
- Click on Add travel notice

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MICHAE HSA	L SMITH (x0001)	Crganize dashboard
Source Report Fast	Settings	
Dashboard	GENERAL	Travel notices
3 Messages	(A) Profile	
Accounts	Security	~
7 Transfers	🗘 User alerts	You have no travel notices
Remote deposits	😽 Travel notices	Add travel notice
Payments	User agreement	
③ Support	ACCOUNTS	
	Bank	
	External transfers	
දී Settings	External transfers  Add account Make transfers from another institution.	



**Dashboard** Card



## **Managing your Travel Alerts**

 From here you can add a notice to include location(s) and dates of any travel and which cards should be permitted during that time

Tra	ravel notices	
[	Destinations	
Li	ist the places that will be traveled to.	0/47
0	Dates	ė
Ca Sel	<ul> <li>ards</li> <li>elect the cards you'd like to use while traveling.</li> <li>MICHAEL SMITH (x0000) Checking, Active</li> </ul>	
	This card has blocked locations under its alerts & protect They may need to be removed to make transactions in t	ction settings. his destination.
	Cancel Save	





# **Card Management FAQs**

#### Q. How do I access my Debit Cards?

A. Debit cards are accessed within Card management. Access Card management for all your debit cards via the Dashboard, or click into your account the debit card is linked to. You will see Card management with your active linked card for that account.

### Q. What can I do in Card Management?

- A. You can set a variety of customized controls and alerts within GRBbank including:
  - 1. Turn debit and credit cards on or off
  - 2. Report cards lost or stolen
  - 3. Activate a new card
  - 4. Alert options for transactions based on location, merchant type, transaction type, spending, and travel alerts
- Q. How do I turn off my debit card off via GRBbank if it's been misplaced, or lost/stolen?
- A. You can turn off your debit card on any device. Find your card under Card management, toggle the slider to lock your card. This keeps your card locked until you turn it back on.

If your card is permanently lost or has been stolen, you may cancel your card by selecting Report lost/stolen.

- Q. How do I activate my debit card via GRBbank?
- A. Find your card under Card management, click Active new card





# **Card Management FAQs**

# Q. How do I set up alerts and protections for my Debit Cards?

- A. Click on your debit card in Card Management. Click *Alerts* and *Protection*. From here you can:
  - 1. Manage how you want to receive these debit card related notifications within Notification settings
  - 2. Set an alert to notify you anytime your debit card is used by toggling the Notify me on all transactions on
  - Set alerts or blocks on International usage under Locations (Note: Blocking will stop in person card usage. Online transactions will still be possible)
  - 4. Set alerts or blocks on Merchant types, transactions types, and set spending limits and alerts

#### Q. I will be traveling, how do I set a Travel Notice?

A. From the Dashboard Card management "card", click the three dots in the upper right corner and click the airplane icon (on the mobile app, the Airplane icon will be visible without clicking the dots). You may also access it by clicking on your name from the bottom of your menu, go to Settings and select *Travel notices*. From here you can add a notice to include location(s) and dates of any travel and which cards should be permitted during that time



