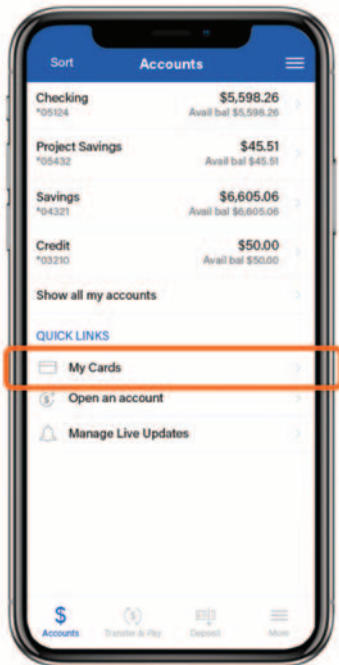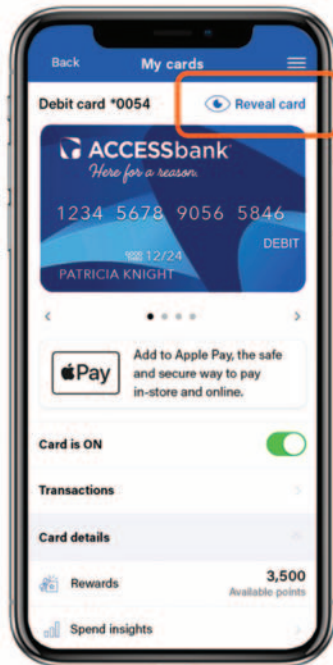# ACCESSbank®

Cheat Sheet: Card Management in Mobile Banking

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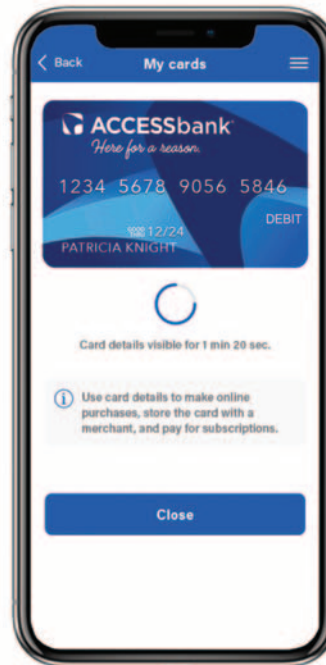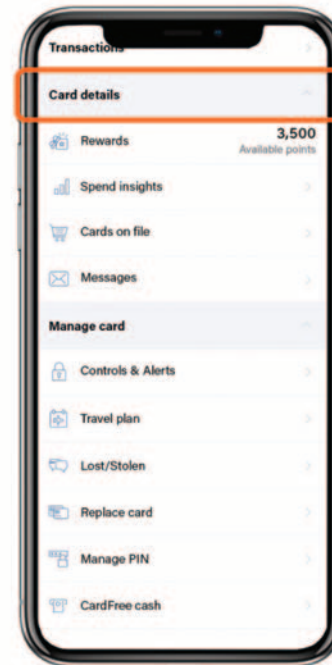
Getting started with card management

After logging in to your mobile banking app, you will be taken to the Accounts screen. Tap "**My cards**" to get started.
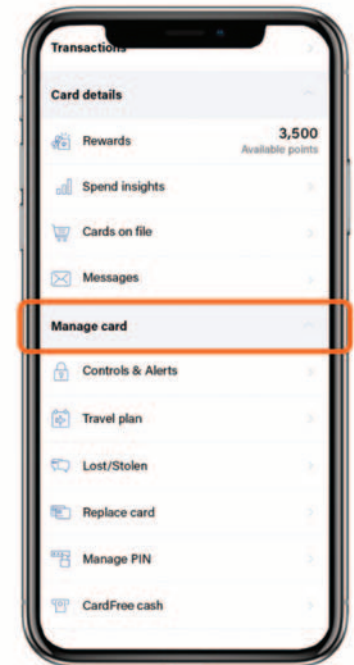
You will be brought to your card controls dashboard. Here you can **view your cards, turn your cards on or off, add your card to your digital wallet, view transactions, access card controls, and view your card information**. Tap "**Reveal card**" to see your card information.

Your card information will display onscreen for 1 minute and 20 seconds. Tap "**Close**" to go back to the card controls dashboard.

From the dashboard, scroll to the Card Details menu to **view spending insights, view where cards are stored on file, and access messages**.
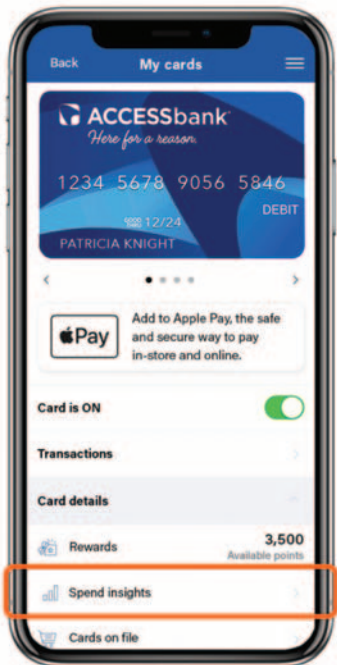
Continue scrolling to the Manage Card menu to **access card controls and alerts, report a card as lost or stolen, replace a card, and manage your PIN**.
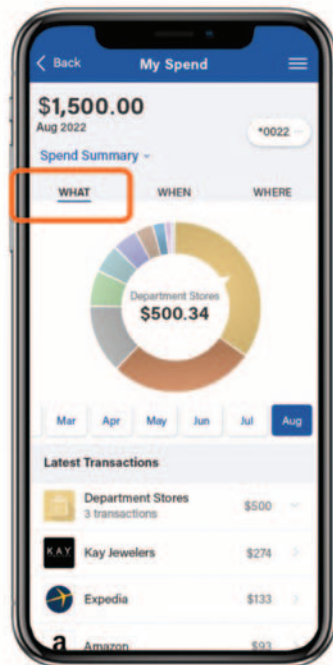
Screenshots are for illustrative purposes only. Exact functionality may vary.

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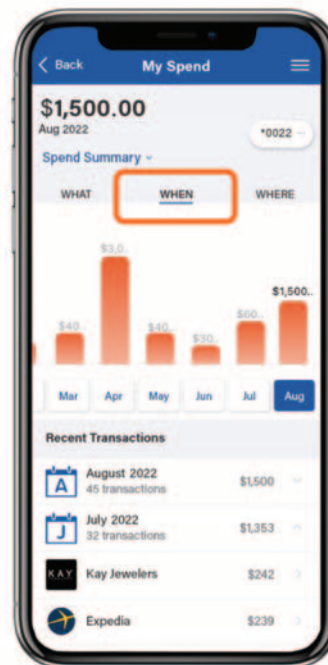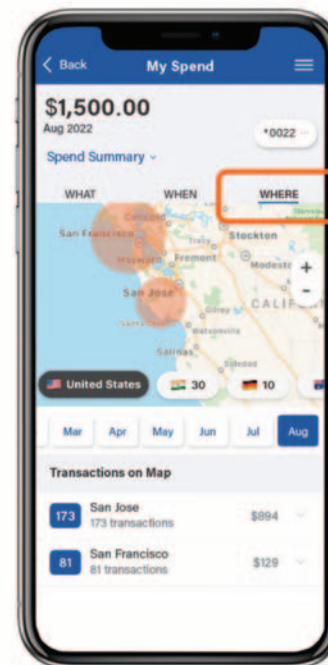
Viewing spend insights

From the card controls dashboard, you can gain insights into your spending habits on your cards. Scroll down and tap "**Spend Insights**" under the Card Details menu.
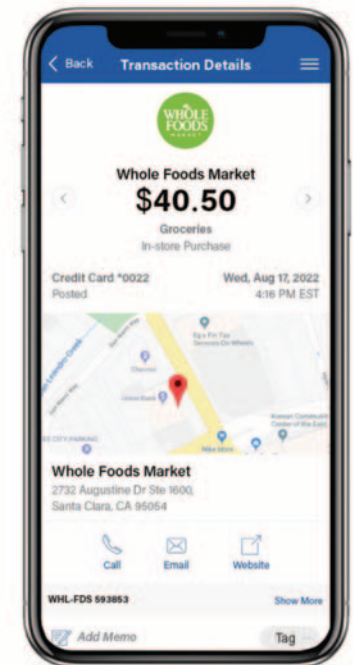
You will be taken to a screen that shows a breakdown of your **spending by category** under the "**What**" section.

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

By tapping "**Where**", you can view the **location** of your transactions on a map.
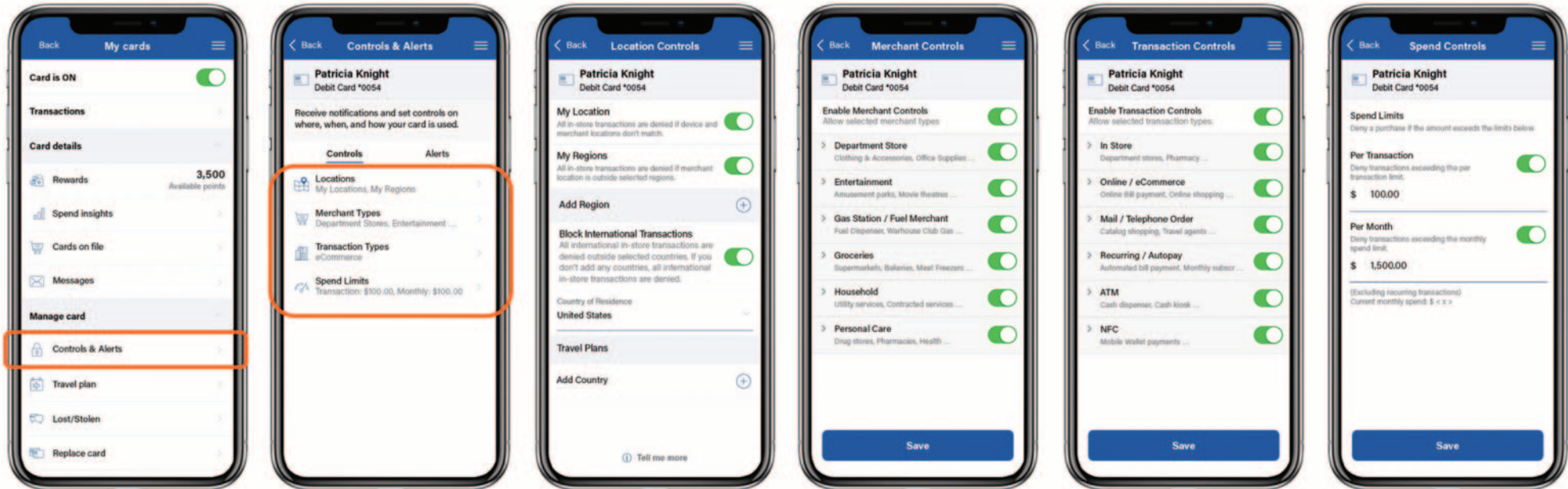
When you tap on a transaction, you can view the **merchant's name, logo, address, phone number, and exact location**! If you don't recognize the purchase, you can touch base with the merchant using the information provided.

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Cheat Sheet: Card Management in Mobile Banking

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

Setting up card controls

From the card controls dashboard, scroll down and tap "**Controls and Alerts**" under the Manage Card menu to access card controls and alerts.

Under "Controls", 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 of 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**".
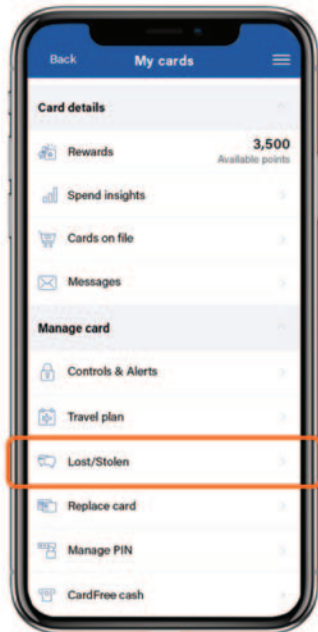
Under Transaction Controls, you can select which **transaction types** are approved for your card (e.g., in store, online, and autopay). To enable or disable a transaction type, toggle the green switch to the right of the transaction type and tap "**Save**".

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**"!
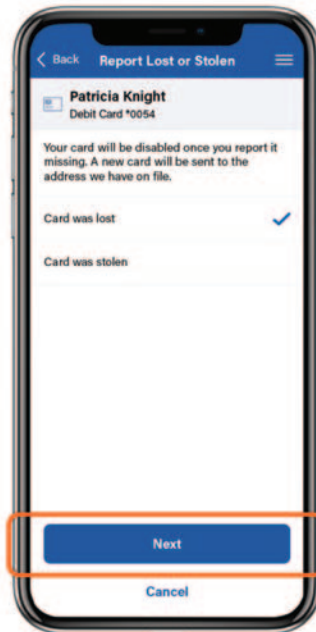
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Users now have powerful tools to manage their cards anytime, anywhere from mobile banking
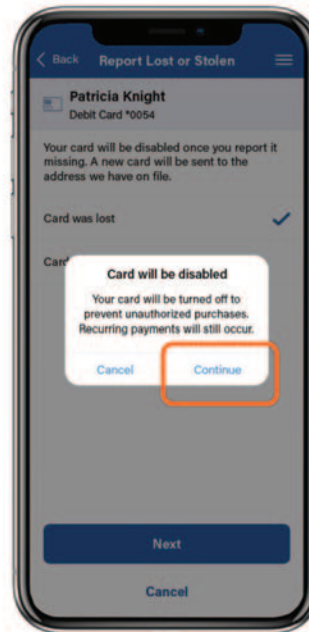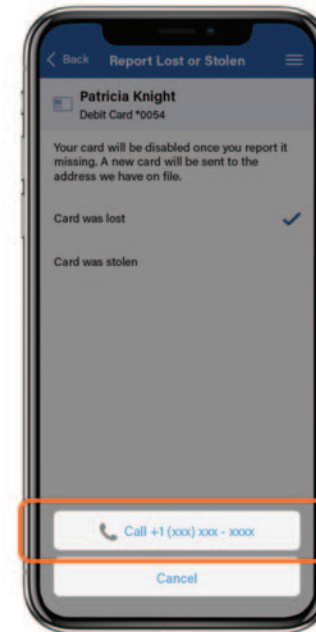
Reporting a lost or stolen card

If your card goes missing, there is no need to panic! From the card controls dashboard, simply scroll down and tap "**Lost/Stolen**" under the Manage Card menu.
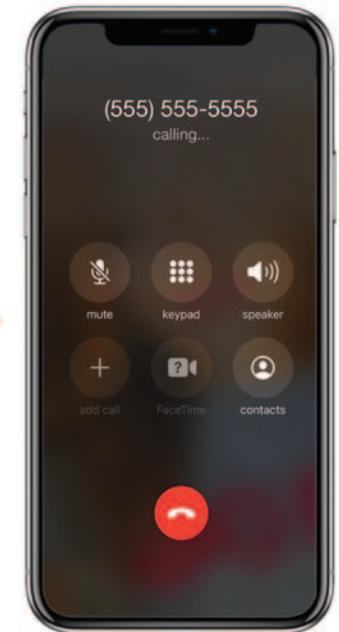
Select whether the card was lost or stolen. Tap "**Next**".

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!
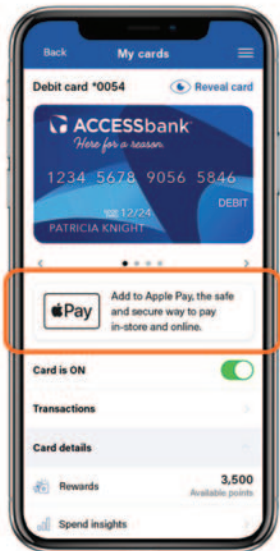
By calling us straight from your mobile app, this ensures a smooth and seamless user experience. Losing a card can be stressful, but with card management — you can stay in control!

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Cheat Sheet: Card Management in Mobile Banking

Users now have powerful tools to manage their cards anytime, anywhere from mobile banking
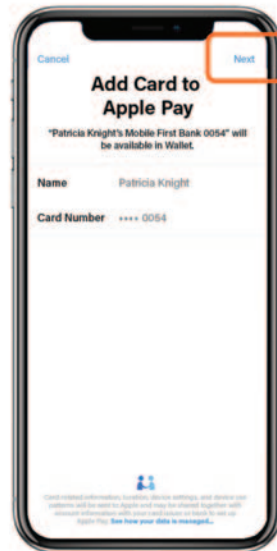
Adding cards to your digital wallet for iOS users

To add a card to your digital wallet, tap the "**Add to Apple Pay**" shortcut on the card controls dashboard.
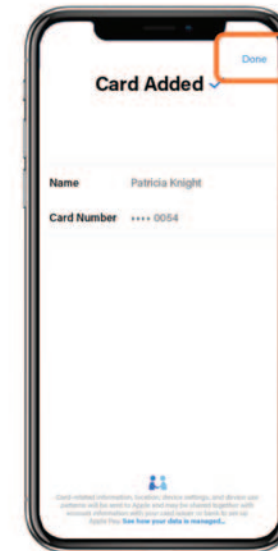
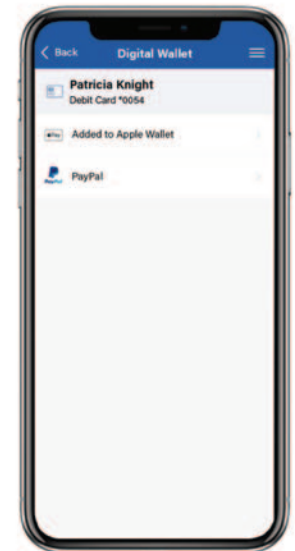For iOS users, tap "**Add to Apple Wallet**".

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 Apple 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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