

# Treasury Management

## Migration User Guide

This document is a guide for users of Tompkins Community Bank's Treasury Management platform, detailing the process required for the upcoming update to your account.

- On **April 8** you will receive an email from [customercare@tompkinsfinancial.com](mailto:customercare@tompkinsfinancial.com), with instructions and a link to create your new Tompkins Community Bank ID.
  - If you did/do not receive an email or you require a password reset, please reach out to your company administrator or contact us at **888-273-3210** for assistance.
- Upon receiving the email on **April 8**:
  - You will have **7 days** to access the link and complete your enrollment
  - Once you have clicked the link you will need to complete your enrollment within **45 minutes**.
  - If you are unable to complete the enrollment within the 7-day window you will need to reach out to your company administrator or contact us at **888-273-3210** to request a new email.
- During enrollment you will be asked to create a new username and password for your account
  - Please note, in some cases you may not be able to use the same username you currently have, and
  - You will not be able to use the same username across multiple companies. If you have access to accounts for multiple businesses, we recommend appending your new username with the appropriate Company ID.
- Once you have established your username and password you will be asked to establish your two-factor authentication method (SMS text, voice phone call, Authenticator App).

### During the conversion there are terms to be familiar with:

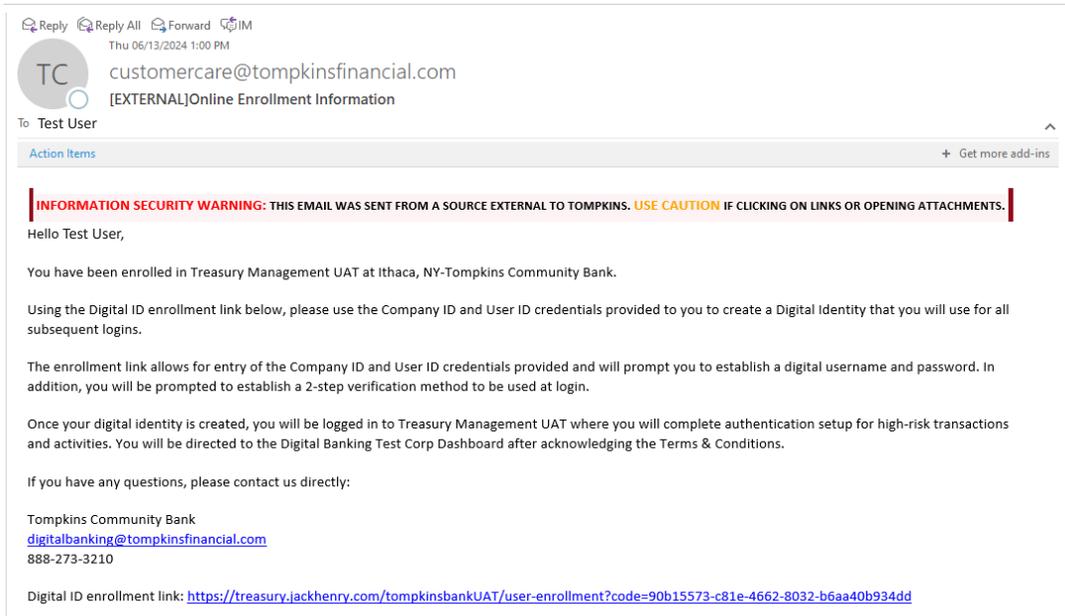
- Login ID: This is your current login that you have used up to this point.
- Tompkins Community Bank ID: This is the new username you are creating that will replace your Login ID.

Please note, this change does not impact the two-factor authentication process for ACH Origination, Wire Origination, and adding/updating users.

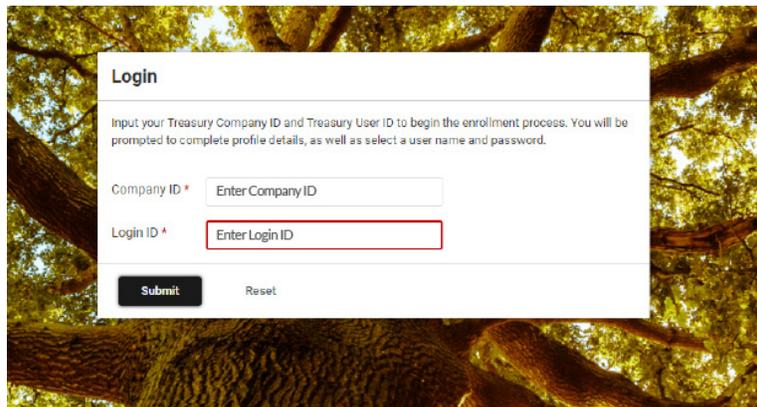
We have included step-by-step instructions below, for what to expect during enrollment. If you need any assistance please reach out to: **888-273-3210**.



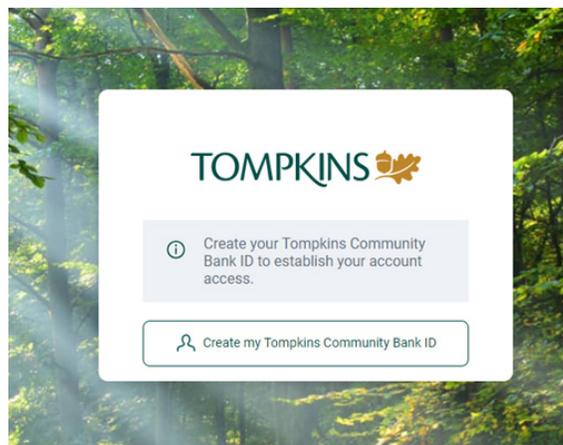
1. You will receive the enrollment email from [customercare@tompkinsfinancial.com](mailto:customercare@tompkinsfinancial.com). If you are a user on multiple companies, the company name specific to the email is listed (see below.)



2. Clicking the Digital ID Enrollment link will take you to a page where you need to enter your Company ID and current Login ID.



3. You will then be asked to create your Tompkins Community Bank ID (click 'Create my Tompkins Community Bank ID' button).



**Need Assistance?**

Please call us at **888-273-3210**.

4. Step 1 of Tompkins Community Bank ID: You will complete and verify profile information.  
Step 2 of Tompkins Community Bank ID: You will create your credentials. This Username and Password will be used for subsequent logins. (If you have multiple accounts to register, consider adding your company ID to your username to easily differentiate between accounts).

The screenshot shows the 'Verify your profile information' screen. At the top, it says 'TOMPKINS' with a leaf logo. Below that, a grey box contains the text: 'Create your Tompkins Community Bank ID to establish your account access.' The main heading is 'Create your Tompkins Community Bank ID' with the sub-heading 'Verify your profile information'. There are four input fields: 'First name (Required)', 'Last name (Required)', 'Email (Required)', and 'Phone Number'. The 'Phone Number' section has three sub-sections: 'Home', 'Mobile', and 'Work', each with a 'Country' dropdown (set to '+1') and a 'US/Canada' checkbox. A 'Next' button is at the bottom.

The screenshot shows the 'Create your Tompkins Community Bank ID credentials' screen. It features a 'Username' input field with a 'Show rules' link below it. Below that is a 'Password' input field with a 'Show rules' link. At the bottom is a 'Confirm password' input field and a 'Next' button.

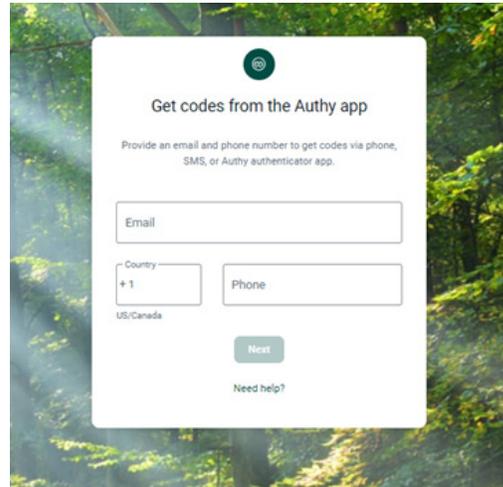
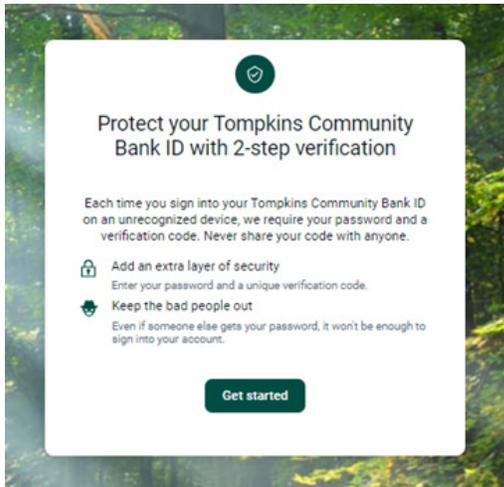
Please note, you may not be able to use your previous Login ID, and may need to create a new unique username for your Tompkins Community Bank ID.

This screenshot shows the same 'Create your Tompkins Community Bank ID credentials' screen as the previous one, but with an error. The 'Username' field contains the text 'jjoned'. Below the field, a red error message reads: 'The username is unavailable.' The 'Next' button is still visible at the bottom.

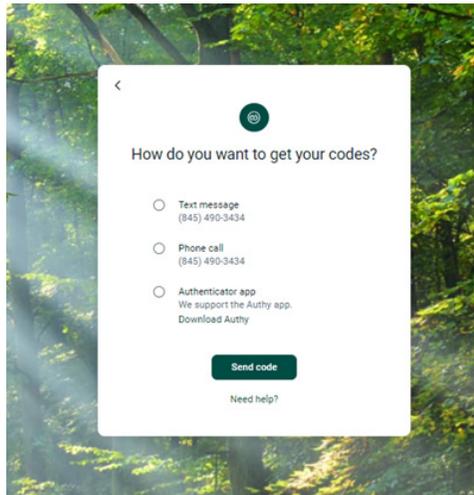
**Need Assistance?**

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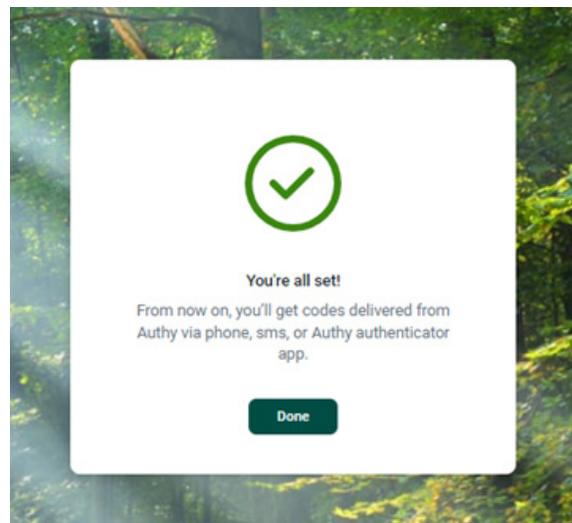
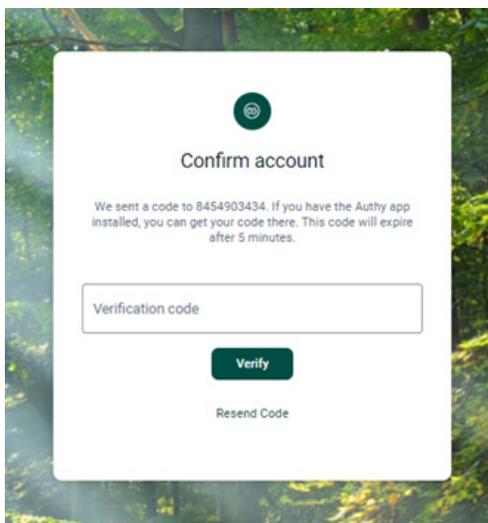
5. You will then be asked to set up your account with a two-factor verification method by entering your contact information. Please note, this is only for the login process. It is separate from, and does not impact, the two-factor verification used for ACH Origination, Wire Origination, and adding / editing users.



You will then have the option to choose how you would like to authenticate your account.



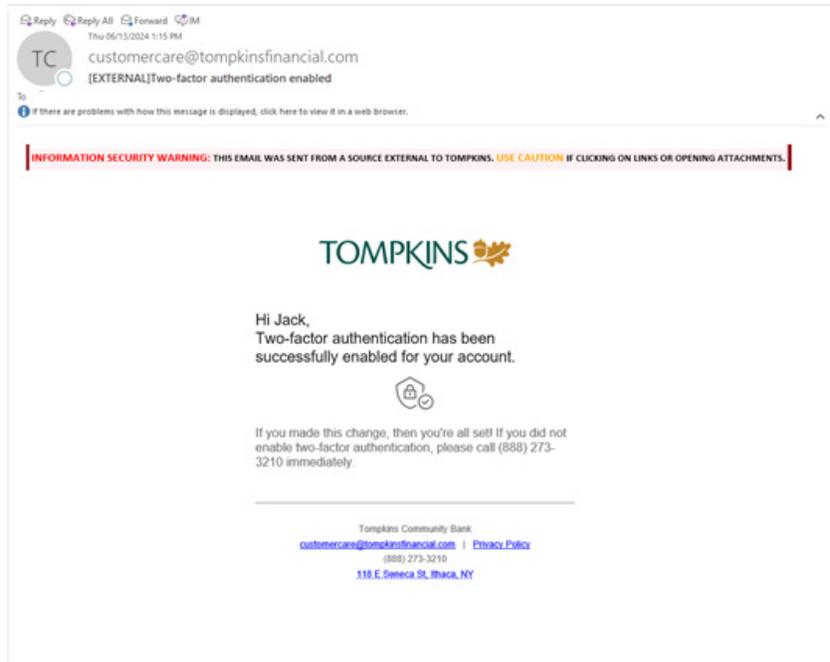
Then you will need to enter the code sent to you through the method you selected.



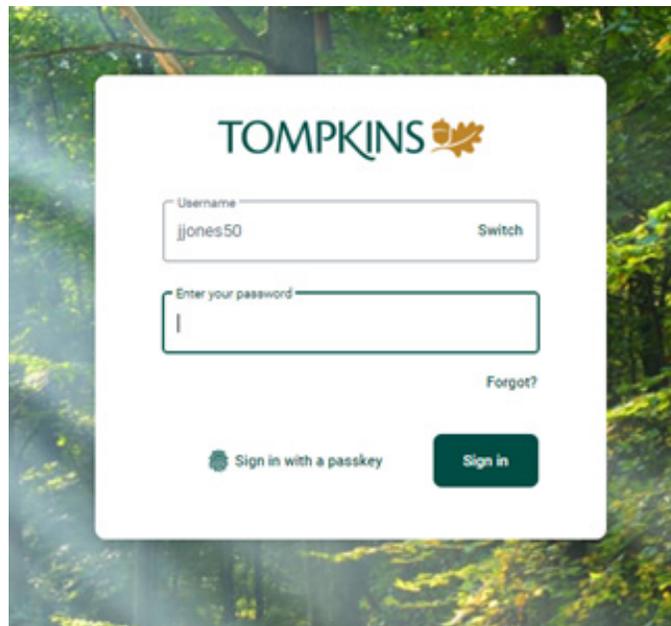
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6. Once complete, you will receive an email confirming your two-factor verification set-up.



You have completed the creation of your Tompkins Community Bank ID. Future logins will require your username, password and two-factor authentication.



**Need Assistance?**

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