## 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.

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- On April 8 you will receive an email from 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. If you are a user on multiple companies, the company name specific to the email is listed (see below.)

Reply Reply All A Forward Cold   Thu 06/13/2024 1:00 PM   customercare@tompkinsfinancial.com   [EXTERNAL]Online Enrollment Information   To   To	~
Action Items	+ Get more add-ins
INFORMATION SECURITY WARNING: THIS EMAIL WAS SENT FROM A SOURCE EXTERNAL TO TOMPKINS. USE CAUTION IF CLICKING ON LINKS OR OPENING ATTA	ACHMENTS.
You have been enrolled in Treasury Management UAT at Ithaca, NY-Tompkins Community Bank.	
Using the Digital ID enrollment link below, please use the Company ID and User ID credentials provided to you to create a Digital Identity that you will subsequent logins.	use for all
The enrollment link allows for entry of the Company ID and User ID credentials provided and will prompt you to establish a digital username and pass addition, you will be prompted to establish a 2-step verification method to be used at login.	word. In
Once your digital identity is created, you will be logged in to Treasury Management UAT where you will complete authentication setup for high-risk tr and activities. You will be directed to the Digital Banking Test Corp Dashboard after acknowledging the Terms & Conditions.	ansactions
If you have any questions, please contact us directly:	
Tompkins Community Bank digitalbanking@tompkinsfinancial.com 888-273-3210	
Digital ID enrollment link: https://treasury.jackhenry.com/tompkinsbankUAT/user-enrollment?code=90b15573-c81e-4662-8032-b6aa40b934dd	

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.

Input your	Treasury Company ID and Treasur	y User ID to begin the enroliment	process. You will be
prompted	to complete profile details, as well	as select a user name and passv	vord.
Company	ID * Enter Company ID		
Login ID *	Enter Login ID		
Subr	nit Reset		
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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).

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TOMPKINS 🐲		TOMPKINS 🐲
O Create your Tompkins Community Bank ID to establish your account access.		Create your Tompkins Community Bank credentials
Create your Tompkins Community Bank ID		Isername
First name (Required)	Sh	ow rules
Last name (Required)	F	assword
Email	Sh	ow rules
Email (Required)		Confirm password
Phone Number Country + 1 Home		Next
USiCanada Country + 1 Mobile		
US/Carada		
US/Canada Next		

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 Comunity Bank ID.

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Create you	ur Tompkins Community Bank ID credentials
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The username is un	ravailable.
Show rules	
Password	
Show rules	
Confirm pass	sword
	Mart

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.



**Need Assistance?** Please call us at 888-273-3210.

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

[EXTERNAL]Two-	factor authentication enabled	
There are problems with how this s	nessage is displayed, click here to view it in a web browser.	
NFORMATION SECURITY WA	RNING: THIS EMAIL WAS SENT FROM A SOURCE EXTERNAL TO TOMPKINS. USE CAUTION IF CLICKING ON LINKS OR OPENING	ATTACHMENTS.
	Hi Jack.	
	Two-factor authentication has been	
	successituity enabled for your account.	
	65	
	If you made this change, then you're all set! If you did not earthe buy factor authoritization, please call (888) 273-	
	3210 immediately.	
	Tompkins Community Bank	
	(860) 273-3210	
	118.E.Seneca.St. Mhaca, NY	

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

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	jjones50	Switch	2
21	Enter your password		10 miles
1.00	🏀 Sign in with a pass	Forgot? tey Sign in	

**Need Assistance?** Please call us at 888-273-3210.