Alliance One

Website FI

Mobile App

How To Quick Guide

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Website FI

Mobile App

TABLE OF CONTENTS (CONT.)

Resources

ADMIN AREA BASICS

This is a quick guide on the admin area of the Alliance One website. Reference this guide when you have questions or issues while working on the site. Use the Glossary section for a quick explanation of the icons used in this guide, use the Troubleshooting section to find solutions to common issues, or use the FAQs section to get your questions answered. Let's get started.

HOW TO LOGIN

You have two options when logging into the Alliance One site. Both function the same, they just use different URL's. Your login credentials are your email address and password that was provided by Alliance One. Here's how to log in using each option:

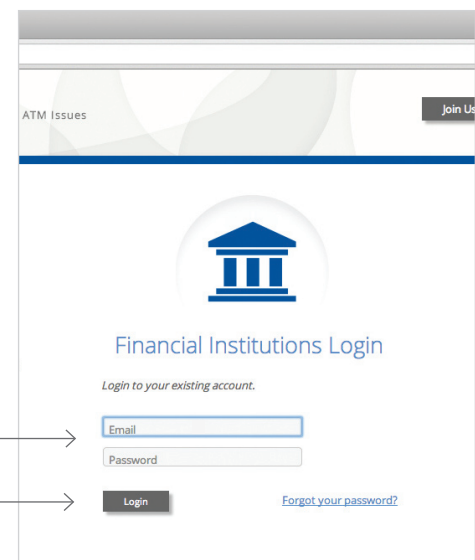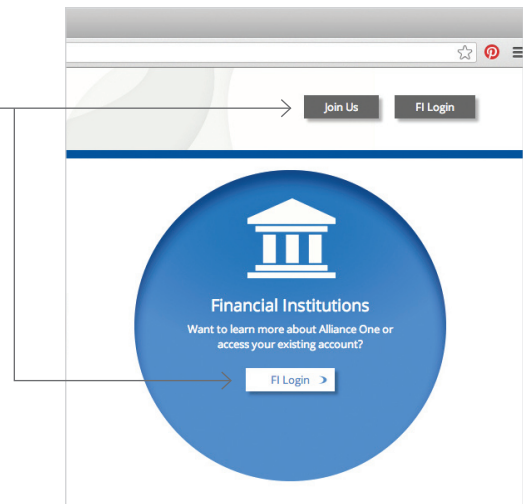### ◖ HOW TO LOGIN: OPTION 1

STEP 1
Go to *http://www.allianceone.coop*

STEP 2
Click the grey *FI Login* button in the top right corner or the white one in the large blue circle

STEP 3
Enter your Email and Password

STEP 4
Click *Login*

◖ HOW TO LOGIN: OPTION 2

STEP 1 Go to *http://www.allianceone.coop/admin*

STEP 2 Enter your Email and Password

STEP 3 Click *Login*

ATM Issues

Join Us

Financial Institutions Login

Login to your existing account.

Email

Password

Login

Forgot your password?
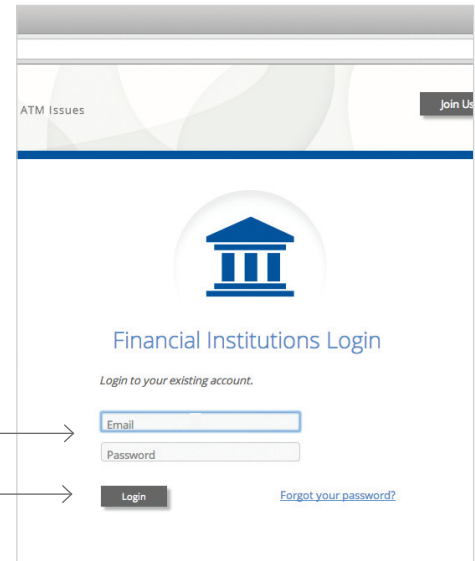
◖ HOW TO RESET YOUR PASSWORD

• Did you forget your password or need to reset it? On the login page you can do that, here's how:

STEP 1 Go to *http://www.allianceone.coop/admin*

STEP 2 Click the *Forgot your password* link

ATM Issues

Join Us

Financial Institutions Login

Login to your existing account.

Email

Password

Login
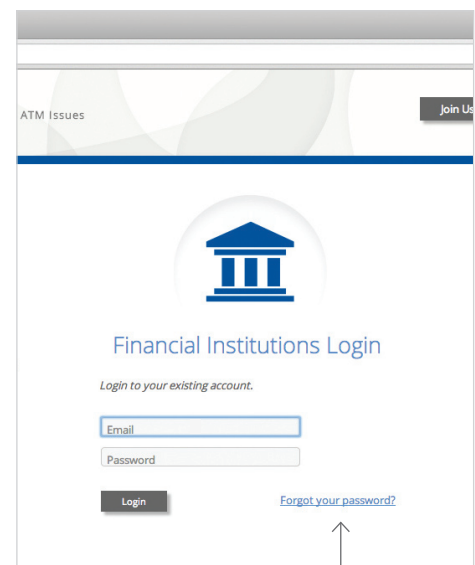
Forgot your password?

STEP 3

Enter your email address in the provided box and click *Send Reset Instructions*

Forgot Password

❷ Please enter your email address that is registered. You will be sent an email containing a link to reset your password.

Email

Send Reset Instructions

• You will be sent an email containing a link to reset your password. Make sure to check your email and click the link as soon as possible - the link will expire 2 hours from when it was sent to you.

DASHBOARD OVERVIEW

Once you login successfully you are now on the dashboard. This is an overall summery view where you will see My ATMs, My BINs, and All Employees (Alliance One contacts for your financial institution). From here you can see what action steps you have the ability to take. There is also a navigation bar at the top of the dashboard and you'll use this to navigate through the FI area of the site as well - learn more about this on page 17.

Dashboard

| Dashboard | My Account | Log Issues | Quarterly Newsletter | Marketing Resources | Download ATM / FI Spreadsheets | Brochure Creator |

Smith Financial Co.
R&T Number: 123456789
1234 W Smith Avenue
Columbus, OH 54321
Tel: 123-456-7890
Fax: 123-456-7890
http://www.smithfinancialco.com

My ATMs

R&T Number	Address	City	State	Features	
123456789	1234 W SMITH AVE	FORT WAYNE	IN		✎ ✖

+ Add New ATM

My BINs

BIN Number	R&T Number	Length	Card Type	BIN/ISO	
1234567	123456789	16		BIN	✎ ✖

+ Add New BIN

All Employees

Title	First Name	Last Name	Email	
CEO/Manager	Jane	Doe	janedoe@email.com	✎ ✖

Invite Employee

HOW TO MANAGE ATMS

You can view My ATMs on the dashboard. From the dashboard you can edit, delete, or add ATMs. Here are the different ATM scenarios:

HOW TO EDIT, DELETE, OR ADD AN ATM

◖ HOW TO EDIT AN ATM

STEP 1
Find the ATM you want to edit in the list on the dashboard

My ATMs

	R&T Number	Address	City	State	Features	
📌	123456789	1234 W SMITH AVE	FT WAYNE	IN		✎ ✖

➕ Add New ATM

STEP 2
On the right side of the dashboard, rollover and click the *Edit* icon

STEP 3
Make the edits to the ATM Listing

Dashboard » Edit ATM Listing

| Dashboard | My Account | Log Issues | Quarterly Newslet |

Address1	1234 W SMITH AVE
Address2	
City	FT WAYNE
County	ALLEN

Terminal Driver

Fiserv EFT

STEP 4
Click *Save*

• Your edit has been made and sent to Alliance One for approval and shows up as pending approval on the dashboard

Save

HOW TO DELETE AN ATM

STEP 1

Find the ATM you want to delete in the list on the dashboard

My ATMs

	R&T Number	Address	City	State	Features	
📌	123456789	1234 W SMITH AVE	FT WAYNE	IN		✏ ✖

+ Add New ATM

STEP 2

On the right side of the dashboard, rollover and click the *Delete* icon

✏ ✖

• The ATM has been queued for deletion and will be removed from the dashboard when Alliance One approves the change

⚠ **Accidentally delete an ATM? Refer to Page 28 to find out what to do!** ⚠

HOW TO ADD AN ATM

STEP 1

On the left side of the dashboard, rollover and click the *Add New ATM* icon

My ATMs

	R&T Number	Address	City	State	Features	
📌	123456789	1234 W SMITH AVE	FT WAYNE	IN		✏ ✖

+ Add New ATM

STEP 2

Fill out the ATM Listing form completely

STEP 3

Click *Create*

• The ATM has been added and sent to Alliance One for approval and shows up as pending approval on the dashboard

HOW TO MANAGE BINS

You can view My BINs on the dashboard. From the dashboard you can edit, delete, or add BINs. Here are the different BIN scenarios:

HOW TO EDIT, DELETE, OR ADD A BIN

HOW TO EDIT A BIN

STEP 1
Find the BIN you want to edit in the list on the dashboard

My BINs

	BIN Number	R&T Number	Length	Card Type	BIN/ISO	
📌	123456	123456789	16		BIN	✏ ✖

＋Add New BIN

STEP 2
On the right side of the dashboard, rollover and click the *Edit* icon
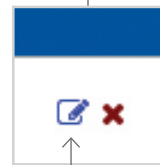
STEP 3
Make the edits to the BIN Listing

STEP 4
Click *Save*

• Your edit has been made and sent to Alliance One for approval and shows up as pending approval on the dashboard

Dashboard » Edit BIN Listing

Dashboard   My Account   Log Issues   Quarterly Newsletter   Mar

BIN   1234567
Length   16

Master Card
○ Yes
◉ No

VISA
○ Yes
◉ No

ATM
○ Yes
◉ No

Type
BIN ▼

Save

HOW TO DELETE A BIN

STEP 1

Find the ATM you want to delete in the list on the dashboard

My BINs

	BIN Number	R&T Number	Length	Card Type	BIN/ISO	
📌	123456	123456789	16		BIN	✎ ✖

+ Add New BIN

STEP 2

On the right side of the dashboard, rollover and click the *Delete* icon
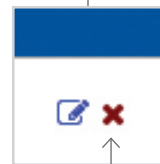
• The BIN has been queued for deletion and will be removed from the dashboard when Alliance One approves the change

⚠️ **Accidentally delete an BIN? Refer to Page 28 to find out what to do!** ⚠️

HOW TO ADD A BIN

STEP 1

On the left side of the dashboard, rollover and click the *Add New BIN* icon

My BINs

	BIN Number	R&T Number	Length	Card Type	BIN/ISO	
📌	123456	123456789	16		BIN	✎ ✖

+ Add New BIN

STEP 2

Fill out the BIN Listing form completely

STEP 3

Click *Create*

• The BIN has been added and sent to Alliance One for approval and shows up as pending approval on the dashboard

HOW TO MANAGE EMPLOYEES

You can view All Employees on the dashboard. From the dashboard you can edit, delete, or invite employees. Here are the different Employees scenarios:

HOW TO EDIT, DELETE, OR INVITE AN EMPLOYEE

◖ HOW TO EDIT AN EMPLOYEE

STEP 1
Find the Employee you want to edit in the list on the dashboard

All Employees

	Title	First Name	Last Name	Email	
	CEO/Manager	Jane	Doe	janedoe@email.com	☑ ✖

👤 Invite Employee

STEP 2
On the right side of the dashboard, rollover and click the *Edit* icon

☑ ✖

STEP 3
Make the edits to the Employee Listing

Dashboard » Editing janedoe

| Dashboard | My Account | Log Issues | Quarterly Newslett |

Email — janedoe@email.com
First Name — Jane
Last Name — Doe
Job Title — CEO/Manager

STEP 4
Click *Update*

Update

• Your edit has been made and sent to Alliance One for approval and shows up as pending approval on the dashboard

◖ HOW TO DELETE AN EMPLOYEE

STEP 1

Find the Employee you want to delete in the list on the dashboard

All Employees					
Title	**First Name**	**Last Name**	**Email**		
CEO/Manager	Jane	Doe	janedoe@email.com		✎ ✗

▲ Invite Employee

STEP 2

On the right side of the dashboard, rollover and click the *Delete* icon

✎ ✗

• The Employee has been queued for deletion and will be removed from the dashboard when Alliance One approves the change

(!) Accidentally delete an Employee? Refer to Page 28 to find out what to do! **(!)**
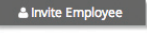
◖ HOW TO INVITE AN EMPLOYEE

STEP 1

On the left side of the dashboard, rollover and click the *Invite Employee* icon

All Employees					
Title	**First Name**	**Last Name**	**Email**		
CEO/Manager	Jane	Doe	janedoe@email.com		✎ ✗

▲ Invite Employee

STEP
2

Fill out the Invite Employee form completely and click *Invite Employee*

• The employee has been invited and sent to Alliance One for approval and shows up as pending approval on the dashboard

NAVIGATION BAR OVERVIEW

You can use this menu to navigate through the FI area of the site and learn how to do the following:

HOW TO EDIT YOUR NAME, JOB TITLE OR EMAIL ADDRESS

HOW TO LOG AN ISSUE

HOW TO ACCESS NEWSLETTERS

HOW TO ACCESS MARKETING RESOURCES

HOW TO DOWNLOAD A LIST OF ALLIANCE ONE ATMS OR PARTICIPATING FIS

HOW TO CREATE A BROCHURE FOR YOUR FI
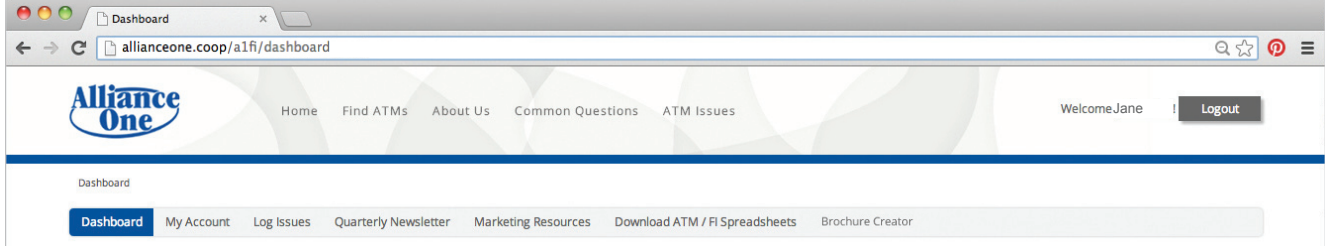
HOW TO EDIT YOUR NAME, JOB TITLE OR EMAIL
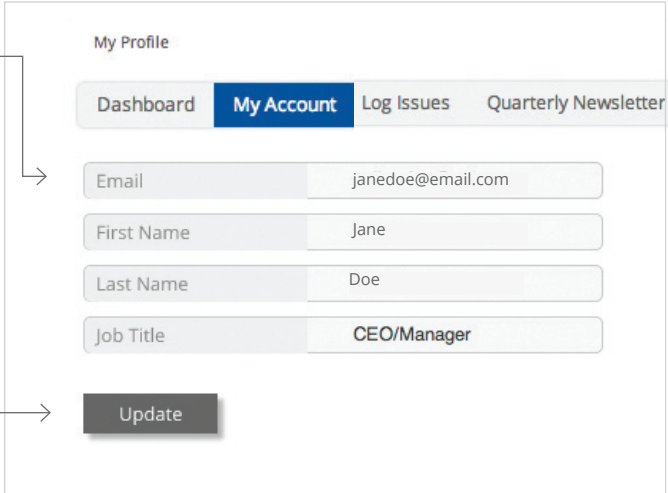
STEP 1 On the navigation bar rollover and click *My Account*

STEP 2

Make the edits to your Employee Listing

My Profile

| Dashboard | My Account | Log Issues | Quarterly Newsletter |

Email   janedoe@email.com

First Name   Jane

Last Name   Doe

Job Title   CEO/Manager

STEP 3

Click *Update*

Update

• Your edit has been made and sent to Alliance One for approval and shows up as pending approval on the dashboard

◖ **HOW TO LOG AN ISSUE**

STEP 1

On the navigation bar rollover and click *Log Issues*

My Profile   ×

allianceone.coop/a1fi/dashboard

lliance One

Home   Fi

ashboard

ashboard   My Account   Log Issues   Qua

STEP 2

Fill out the Log Issues form completely

Log Issues ✕

allianceone.coop/log-issues

Alliance One

Home | Find ATMs | Abo

Dashboard | My Account | Log Issues | Quarterly Newsletter

Your Email

Explain Issues Here

Cardholder Name

Transaction Date

Time of Day

Terminal ID

ATM Address

Surcharge Institution Name

Transaction Amount

BIN

Transaction ID

STEP 3

Click *Submit*

Submit

• The issue has been sent to Alliance One and they will contact you regarding your issue within 2 business days if not sooner

HOW TO ACCESS NEWSLETTERS

STEP 1

On the navigation bar rollover and click *Quarterly Newsletter*

coop/a1fi/dashboard

Home   Find ATMs   About Us

nt   Log Issues   **Quarterly Newsletter**   Ma
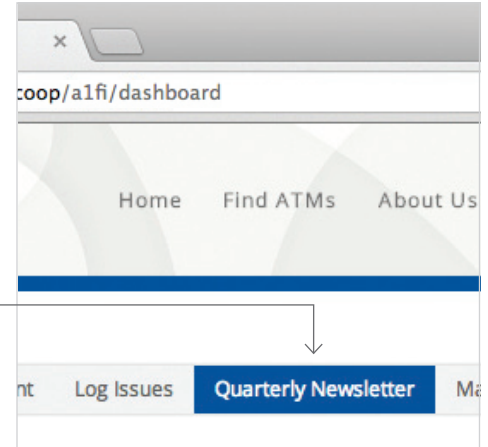
STEP 2

From the Quarterly Newsletter page you can click into each previously sent Alliance One newsletter

Invite Employee

allianceone.coop/newsletter

Alliance One

Home   Find ATMs   About Us   Common Questions   ATM Issues

Welcome janedoe!   Logout

Newsletter

Dashboard   My Account   Log Issues   Quarterly Newsletter   Marketing Resources   Download ATM / FI Spreadsheets   Brochure Creator

Newsletter

2013 - 3rd Quarter

Posted Yesterday at 9:07am

Atom VALID | VALID RSS

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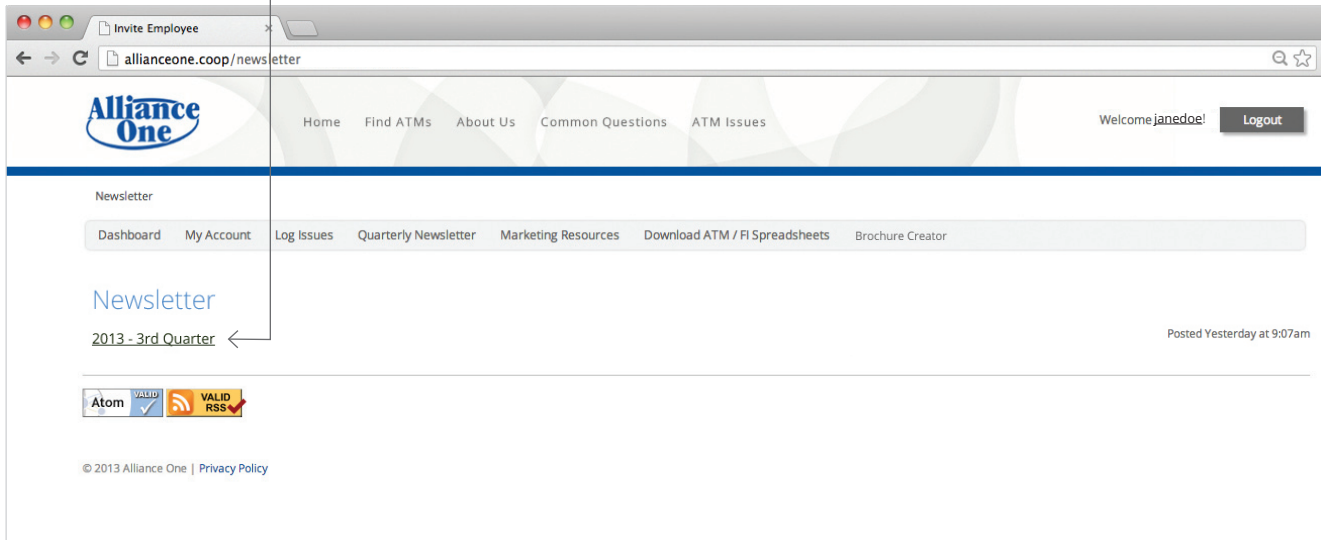
STEP 1
On the navigation bar rollover and click *Marketing Resources*

STEP 2
From the Marketing Resources page you can download:

• table tents
• posters
• statement stuffers
• web site graphics
• logos

STEP 1

On the navigation bar rollover and click *Download ATM / FI Spreadsheets*

non Questions   ATM Issues

sources   **Download ATM / FI Spreadsheets**

STEP 2

From the Download ATM / FI Spreadsheets page you can:

• Download a list of Alliance One ATMs

• Download a list of Alliance One participating FIs

janedoe!

Download Spreadsheets   ×

allianceone.coop/download–spreadsheets

Alliance One

Home   Find ATMs   About Us   Common Questions   ATM Issues
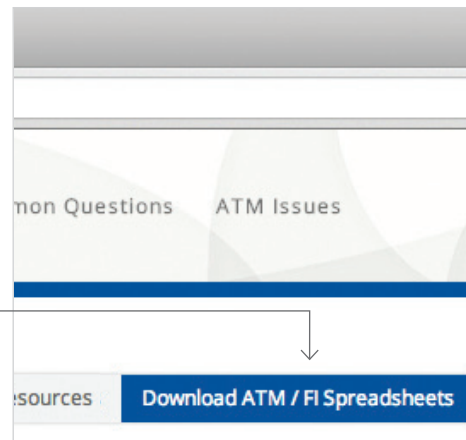
janedoe!
Welcome janedoe! !   Logout

Dashboard   My Account   Log Issues   Quarterly Newsletter   Marketing Resources   Download ATM / FI Spreadsheets   Brochure Creator

Download ATM/FI Spreadsheets

To download a list of participating financial institutions, use the link below.

If you are using Microsoft® Internet Explorer®, right-click over the link and select Save Target As. Follow the instructions and save the file to a location on your computer.

Full ATM Listing Spreadsheet   Full Financial Institution Spreadsheet

This file is a comma-delimited file (.CSV) and is best opened in Microsoft® Excel® or a similar spreadsheet application.
To import the file into Microsoft Excel:

1. After you've downloaded the file, launch Microsoft Excel.
2. Click "File>Open." Under "Files of type:" select "All files."
3. Locate the file you downloaded to your computer and click "Open."

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HOW TO CREATE A BROCHURE FOR YOUR FI

STEP 1

On the navigation bar rollover and click *Brochure Creator*

From the Brochure Creator page you can produce a brochure that includes your FI logo, a list of nearest FI ATMs and a list of the nearest Alliance One ATMs. Here's how to make a brochure:

Issues

FI Spreadsheets | Brochure Creator

STEP 2

Upload the Financial Institution logo – JPG or PNG images at 300ppi, at least 500px wide

STEP 3

Choose the Financial Institution

STEP 4

Specify a partial or full address, city, state, or zip code

FI Logo
○ Upload
○ Paste via URL   Choose File No file chosen
○ None

Please upload only JPG or PNG images @ 300ppi at least 500px wide.

FI Name
274975848 - A A FCU

Search Address
City
State
Zip Code

STEP 5

Choose the search radius

Search Radius
1 Mile

STEP 6

Click *Create Brochure*

Create Brochure

• The brochure has been created and a PDF will automatically download on your computer

MOBILE APP USER BASICS

This is a general overview of the Alliance One mobile app functionality.

LAUNCH THE APP

Click on the Alliance One app icon to get started

ALLIANCE ONE APP HOME SCREEN

From this page, access the ATM Locator, General Info, and Bookmarked ATMs

ATM Locator

Use My Location

OR

Enter Address or Zip   GO

★ My Bookmarked ATMs

USE THE ATM LOCATOR

Click the *Use My Location* button and allow your phone to use your current location or enter an address or zip code

GET GENERAL INFO

Back

Alliance One, founded in 1998, is a nationwide cooperative group of credit unions, community banks and thrifts that have joined forces to let their cardholders access each others' ATMs all over America without having to pay ATM surcharge fees. That cooperative spirit not only gives you more convenient ATMs to choose from, it also leaves that extra $2.00 where it should be - in your account.

Visit Our Website

ACCESS BOOKMARKED ATMs

My Bookmarked ATMs

KEMBA Financial CU 7.49 mi
4311 N HIGH ST.
COLUMBUS, OH 43214

CME FCU 4.31 mi
400 W WHITTIER
COLUMBUS, OH 43215

NEARBY ATMs

This shows all ATMs near your current location or to the address/zip code entered. Click on a white balloon to see details for a single ATM location.
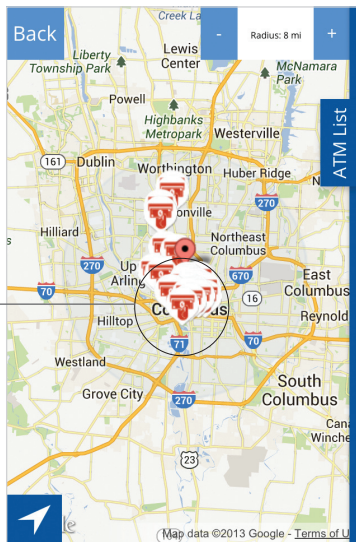
NO ATMs AVAILABLE

This screen appears when no ATMs are whithin your radius-user will need to increase radius to see ATMs.
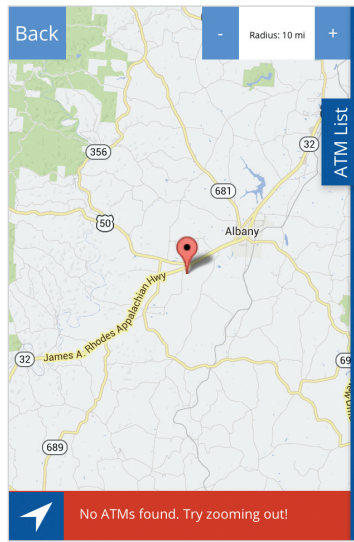
ATM LIST VIEW

Click ATM List to see a list view of the nearby ATMs
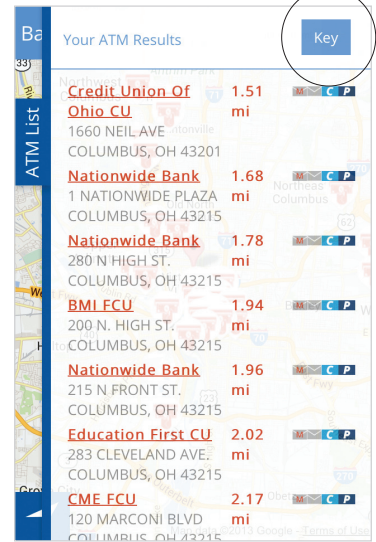
ATM DETAILS
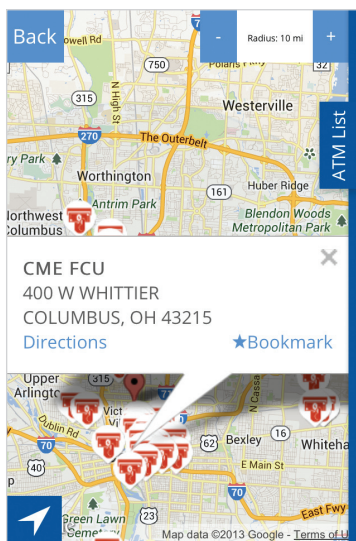
Click the x to close the info box, click Directions to get directions to this ATM, or click Bookmark to add this ATM to your list of Bookmarked ATMs.

This key describes the following features for ATMs:

🅜 = Accepts Member Deposits

✉ = Accepts All Deposits

🆑 = Cirrus Gateway

🅟 = Plus Gateway

ATM LIST VIEW KEY
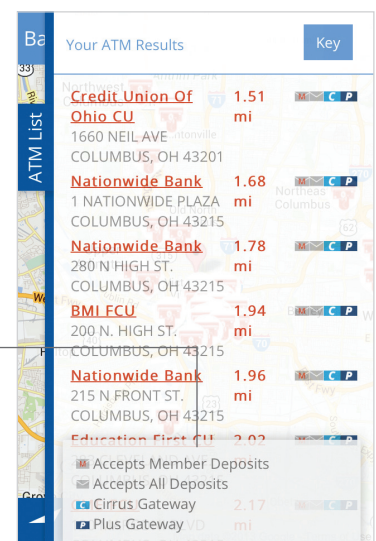
HOW TO FORCE RESTART THE APP

iPhone

STEP 1
Click the home button of your iPhone to force quit the app

STEP 2
Once on your home phone screen, double click the home button

STEP 3
Press and hold down the Alliance One ATM Locator icon until a minus sign appears in the upper left corner

STEP 4
Click the minus sign

STEP 5
Double click the home button

STEP 6
Click the Alliance One ATM Locator icon to restart the app

Android

STEP 1
Tap and hold the home button

STEP 2
Swipe across the Alliance One app to remove it from the list and kill it

STEP 3
Tap the home button

STEP 4
Tap the Alliance One ATM Locator icon to restart the app

GLOSSARY

This is a list of icons that are commonly used throughout the site and on the app:

    = Edit

    = Pending approval from Alliance One

    = Delete

    = Accepts Member Deposits

    = Accepts Deposits

    = Cirrus Gateway

    = Plus Gateway

    = No Public Access

SITE GENERATED EMAIL EXAMPLES

When an automated email is sent out from the website, below are examples of what they will look like visually:

EXAMPLE 1: New Account Registration (the "waiting for approval" email)
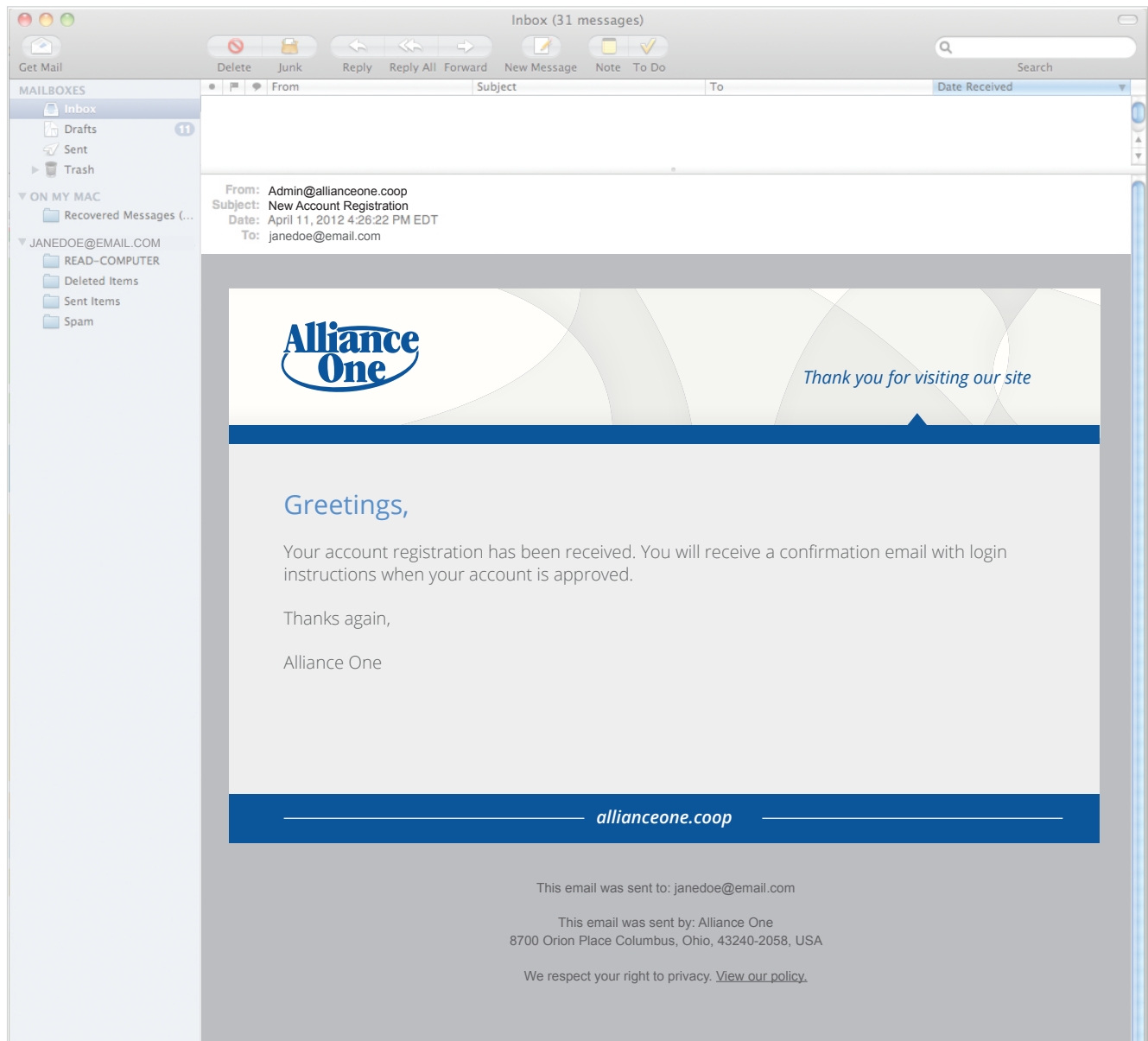
EXAMPLE 2: Account Approved
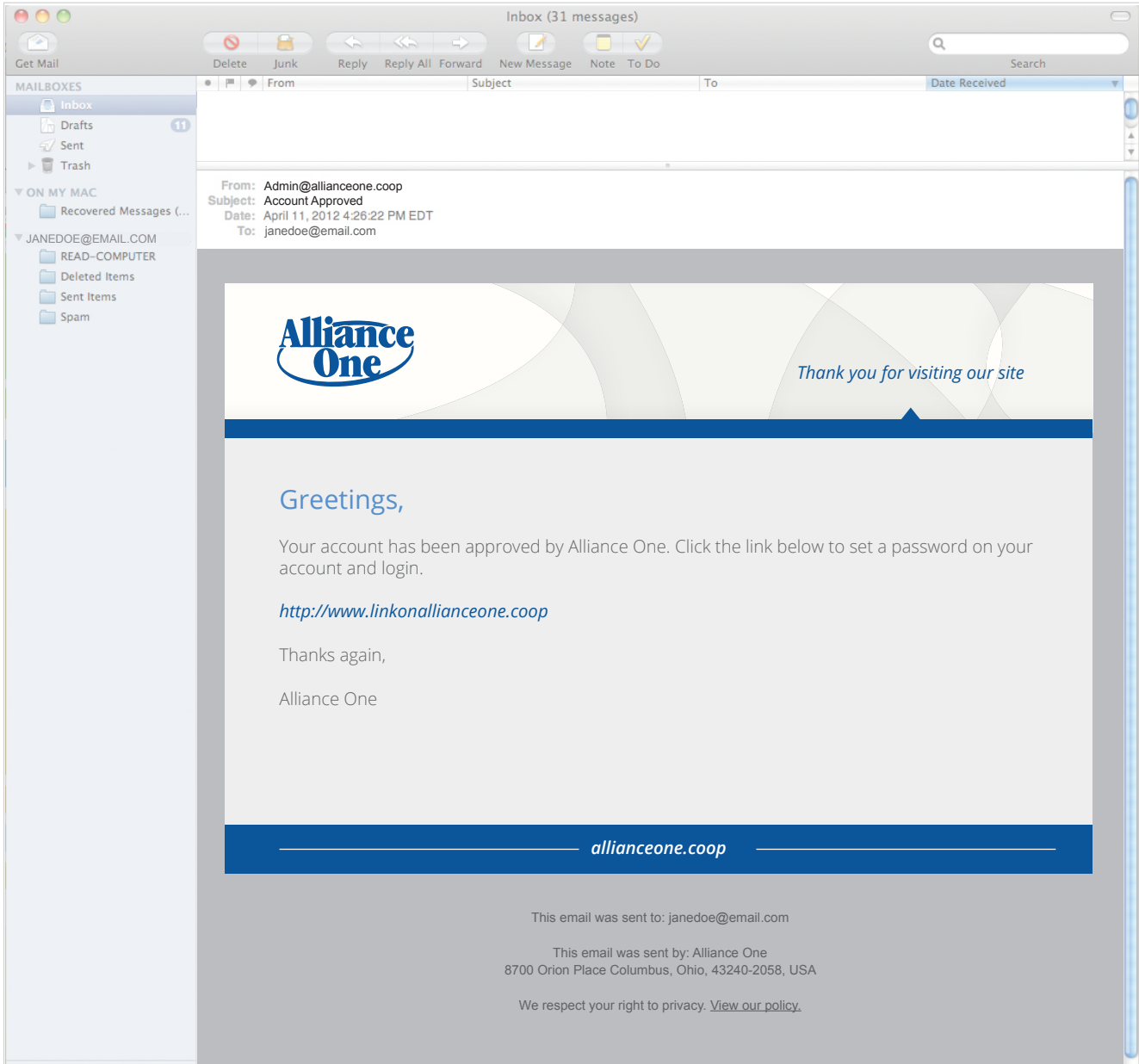
EXAMPLE 3: Forgotten Password

Inbox (31 messages)

Get Mail | Delete | Junk | Reply | Reply All | Forward | New Message | Note | To Do | Search

MAILBOXES
- Inbox
- Drafts (11)
- Sent
- ▶ Trash

▼ ON MY MAC
- Recovered Messages (...

▼ JANEDOE@EMAIL.COM
- READ–COMPUTER
- Deleted Items
- Sent Items
- Spam

From: Admin@allianceone.coop
Subject: Forgotten Password
Date: April 11, 2012 4:26:22 PM EDT
To: janedoe@email.com

Alliance One

Thank you for visiting our site

Greetings,

You may reset your password by clicking this one-time reset link. This link will expire in 2 hours.

http://www.linkonallianceone.coop

Thanks again,

Alliance One

allianceone.coop

This email was sent to: janedoe@email.com

This email was sent by: Alliance One
8700 Orion Place Columbus, Ohio, 43240-2058, USA

We respect your right to privacy. View our policy.

EXAMPLE 4: Bi-Annual Login to Your Account & Update Your ATM Listings

Inbox (31 messages)

Get Mail   Delete   Junk   Reply   Reply All   Forward   New Message   Note   To Do   Search

MAILBOXES
Inbox
Drafts   11
Sent
Trash

▼ ON MY MAC
Recovered Messages (...

▼ JANEDOE@EMAIL.COM
READ–COMPUTER
Deleted Items
Sent Items
Spam

From: Admin@allianceone.coop
Subject: Please Login to Your Account & Update Your ATM Listings
Date: April 11, 2012 4:26:22 PM EDT
To: janedoe@email.com

Alliance One

Thank you for visiting our site

Greetings,

Please sign in to update your ATM listings. Your involvement ensures that all of your active ATM locations display on our website and within the Alliance One ATM Locator mobile app.

Thank you very much,

Alliance One

allianceone.coop

This email was sent to: janedoe@email.com

This email was sent by: Alliance One
8700 Orion Place Columbus, Ohio, 43240-2058, USA

We respect your right to privacy. View our policy.

TROUBLESHOOTING

This is a list of common issues users have with the site with solutions for those issues:

! Accidentally delete an ATM? Here's what to do: **!**

› Recreate the ATM listing. To do that, go to page 9–10 of this guide and follow the steps on **HOW TO ADD AN ATM**.

! Accidentally delete an BIN? Here's what to do: **!**

› Recreate the BIN listing. To do that, go to page 12–13 of this guide and follow the steps on **HOW TO ADD A BIN**.

! Accidentally delete an Employee? Here's what to do: **!**

› Invite the employee. To do that, go to pages 15–16 of this guide and follow the steps on **HOW TO INVITE AN EMPLOYEE**.

FAQS

This is a list of frequently asked questions users have about the site with answers to those questions:

> **Q** **What's the difference between *Request Account Registration* and *Join Us*?**

A *Request Account Registration* is where a current Alliance One member registers to receive user login credentials for the admin area of allianceone.coop.

Join Us is the form used by a financial institution in order to sign up to join the Alliance One network and be contacted by Corporate One to get more information and become an Alliance One member. Upon completing that process the financial institution will be directed to *Request Account Registration*.