



Website FI

Mobile App

How To Quick Guide

TABLE OF CONTENTS

Website FI

ADMIN AREA BASICS

HOW TO LOGIN	PAGE 4
HOW TO LOGIN: OPTION 1	PAGE 4
HOW TO LOGIN: OPTION 2	PAGE 5
HOW TO RESET YOUR PASSWORD	PAGES 5-6
DASHBOARD OVERVIEW	PAGE 7
HOW TO MANAGE ATMS	PAGE 8
HOW TO EDIT AN ATM	PAGE 8
HOW TO DELETE AN ATM	PAGE 9
HOW TO ADD AN ATM	PAGES 9-10
HOW TO MANAGE BINS	PAGE 11
HOW TO EDIT A BIN	PAGE 11
HOW TO DELETE A BIN	PAGE 12
HOW TO ADD A BIN	PAGES 12-13
HOW TO MANAGE EMPLOYEES	PAGE 14
HOW TO EDIT AN EMPLOYEE	PAGE 14
HOW TO DELETE AN EMPLOYEE	PAGE 15
HOW TO INVITE AN EMPLOYEE	PAGES 15-16
NAVIGATION BAR OVERVIEW	PAGE 17
HOW TO EDIT YOUR NAME, JOB TITLE OR EMAIL ADDRESS	PAGES 17-18
HOW TO LOG AN ISSUE	PAGES 18-19
HOW TO ACCESS NEWSLETTERS	PAGE 20
HOW TO ACCESS MARKETING RESOURCES	PAGE 21
HOW TO DOWNLOAD A LIST OF ALLIANCE ONE ATMS OR PARTICIPATING FIS	PAGE 22
HOW TO CREATE A BROCHURE FOR YOUR FI	PAGE 23

Mobile App

MOBILE APP USER BASICS

LAUNCH THE APP	PAGE 24
USE THE ATM LOCATOR/GET GENERAL INFO/ACCESS BOOKMARKED ATMS	PAGES 24-25
HOW TO FORCE RESTART THE APP	PAGE 26

TABLE OF CONTENTS (CONT.)

Resources

GLOSSARY	PAGE 27
SITE GENERATED EMAIL EXAMPLES	PAGES 28-31
TROUBLESHOOTING	PAGE 32
FAQS	PAGE 33

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:

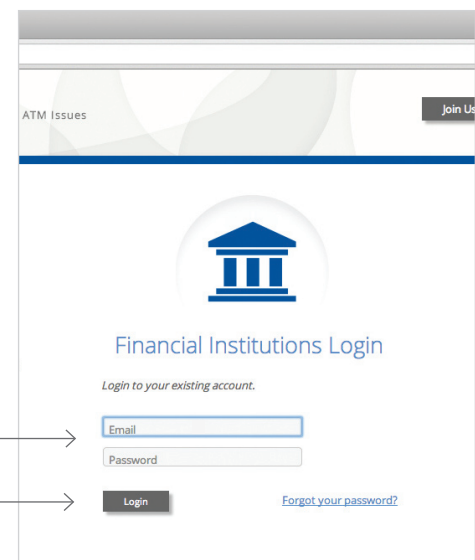
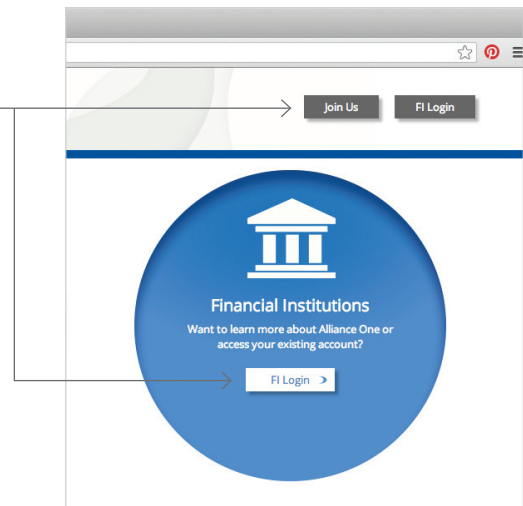
HOW TO LOGIN: OPTION 1

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

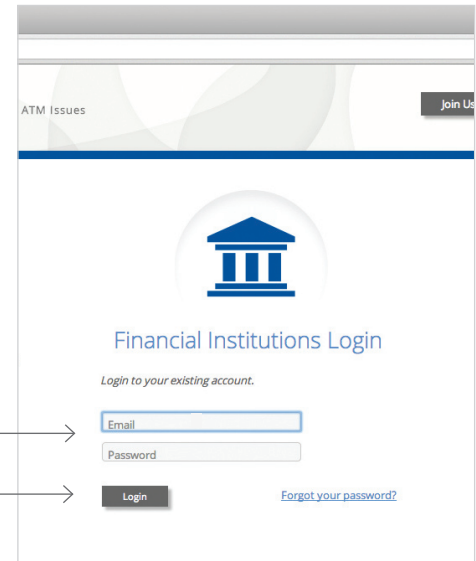
STEP 3 Enter your Email and Password

STEP 4 Click *Login*



HOW TO LOGIN: OPTION 2

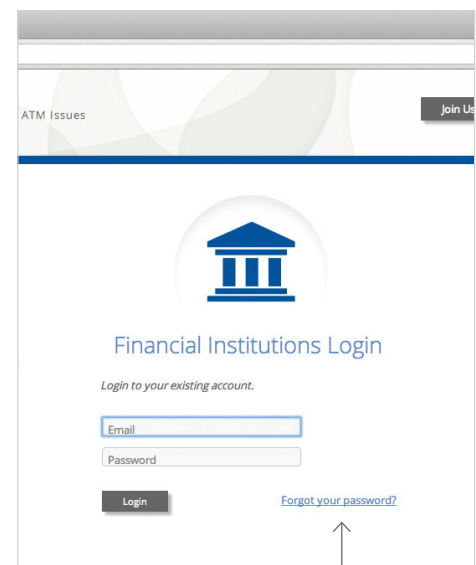
- STEP 1 Go to <http://www.allianceone.coop/admin>
- STEP 2 Enter your Email and Password
- STEP 3 Click *Login*



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



HOW TO RESET YOUR PASSWORD (CONT.)

STEP
3

Enter your email address in the provided box and click [Send Reset Instructions](#)

The screenshot shows a 'Forgot Password' form. At the top, there is a yellow instruction box: 'Please enter your email address that is registered. You will be sent an email containing a link to reset your password.' Below this is an 'Email' input field. At the bottom is a 'Send Reset Instructions' button. Two arrows point from the text box above to the yellow instruction box and the 'Send Reset Instructions' button.

- 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 summary 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.

The screenshot shows a web browser window with the URL `allianceone.coop/alfi/dashboard`. The page features the Alliance One logo and a navigation menu with links for Home, Find ATMs, About Us, Common Questions, and ATM Issues. A user greeting "Welcome Jane" and a "Logout" button are visible in the top right.

Below the navigation bar, a secondary menu includes "Dashboard" (highlighted), My Account, Log Issues, Quarterly Newsletter, Marketing Resources, Download ATM / FI Spreadsheets, and Brochure Creator.

Contact information for Smith Financial Co. is provided:

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

STEP 4 Click *Save*

Dashboard » Edit ATM Listing

Dashboard My Account Log Issues Quarterly Newsletter

Address1 1234 W SMITH AVE

Address2

City FT WAYNE

County ALLEN

Terminal ID AMU792

Terminal Driver

Fiserv EFT

Save



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 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	Circle K PLUS	 

+ 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	Circle K PLUS	 

+ Add New ATM

HOW TO ADD AN ATM (CONT.)

STEP
2

Fill out the ATM Listing form completely

Address1

Address2

City

County

State

Zip

Country USA

Accept Member Deposits

Yes

No

Accept Public Deposits

Yes

No

Public

Yes

No

Plus_gateway

Yes

No

Cirrus_gateway

Yes

No

Terminal_id

Terminal Driver

-- Other --

ATM Status

Yes

No

Set this to no if you want to hide the ATM listing from public results.

Create

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

HOW TO ADD A BIN (CONT.)

STEP
2

Fill out the BIN Listing form completely

The screenshot shows a web browser window with the URL `allianceone.coop/a1bin/create`. The page title is "Add BIN Listing". The Alliance One logo is at the top left, and navigation links for "Home", "Find ATMs", and "About Us" are at the top right. Below the logo, there is a breadcrumb trail: "BIN Administration » Add BIN Listing". A navigation bar contains "Dashboard", "My Account", "Log Issues", "Quarterly Newsletter", and "Ma". The main form has the following fields:

- BIN**: A text input field.
- Length**: A text input field containing the value "16".
- Master Card**: A section with two radio buttons: "Yes" (unselected) and "No" (selected).
- VISA**: A section with two radio buttons: "Yes" (unselected) and "No" (selected).
- ATM**: A section with two radio buttons: "Yes" (unselected) and "No" (selected).
- Type**: A dropdown menu currently showing "BIN".
- Create**: A dark button at the bottom right of the form.

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

[Update](#)

STEP 4 Click *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	



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!




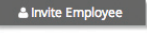
HOW TO INVITE AN EMPLOYEE

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	



HOW TO INVITE AN EMPLOYEE (CONT.)

STEP
2

Fill out the Invite Employee form completely and click [Invite Employee](#)

The screenshot shows a web browser window with the URL `allianceone.coop/a1.fi/employee/invite`. The page features the Alliance One logo and navigation links: Home, Find ATMs, About Us, Common Questions, and ATM Issues. A user is logged in as 'janedoe' with a 'Logout' button. The breadcrumb trail is 'Dashboard > Invite Employee'. A secondary navigation bar includes: Dashboard, My Account, Log Issues, Quarterly Newsletter, Marketing Resources, Download ATM / FI Spreadsheets, and Brochure Creator. A yellow informational box states: 'Use this form to send an invite to another employee of your Financial Institution to grant them access as well. Please note that all invites and registrations will need to be approved by Corporate One.' The form contains input fields for Email, First Name, Last Name, and Job Title, followed by an 'Invite Employee' button.

- 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

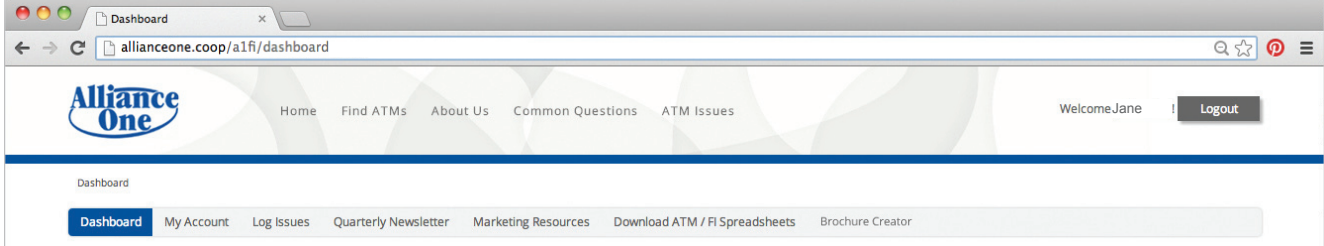
HOW TO LOG AN ISSUE

HOW TO ACCESS NEWSLETTERS

HOW TO ACCESS MARKETING RESOURCES

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

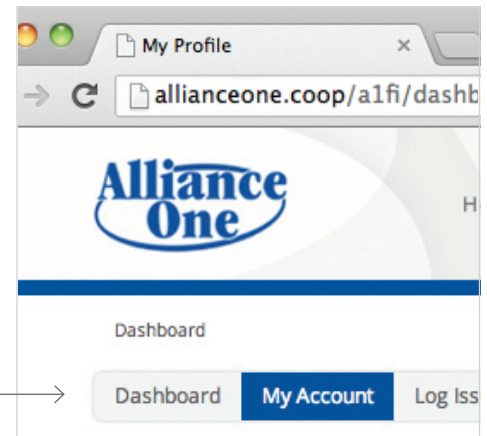
HOW TO CREATE A BROCHURE FOR YOUR FI



HOW TO EDIT YOUR NAME, JOB TITLE OR EMAIL

STEP
1

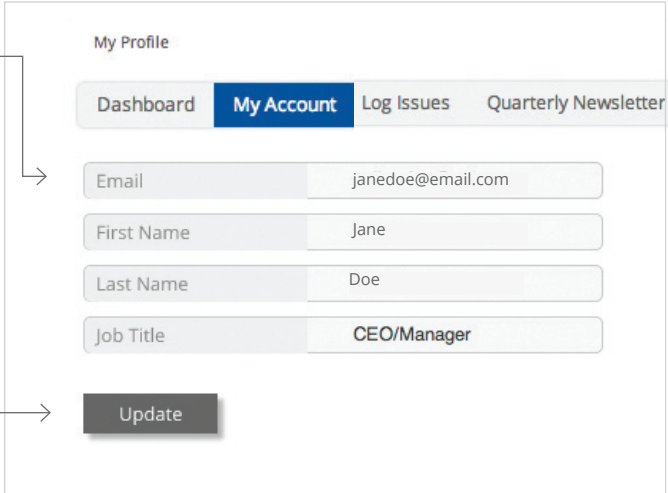
On the navigation bar rollover and click *My Account*



HOW TO EDIT YOUR NAME, JOB TITLE OR EMAIL ADDRESS (CONT.)

STEP 2 Make the edits to your Employee Listing

STEP 3 Click *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*



HOW TO LOG AN ISSUE (CONT.)

STEP
2

Fill out the Log Issues form completely

Log Issues

allianceone.coop/log-issues

Alliance One

Home Find ATMs About

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

Submit

STEP
3

Click *Submit*

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

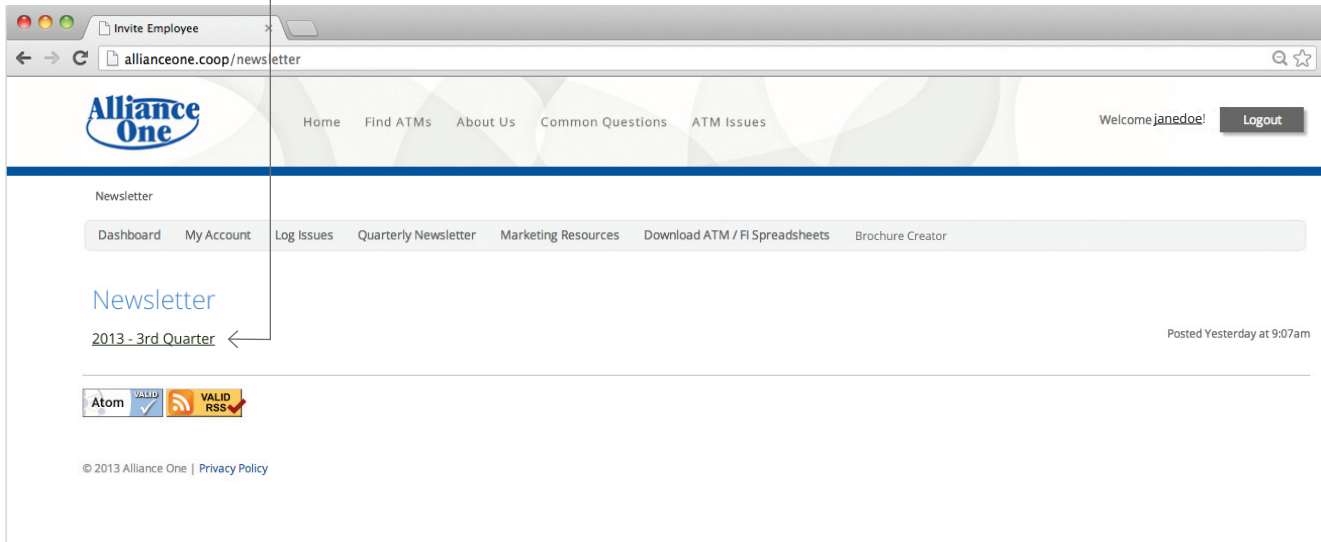
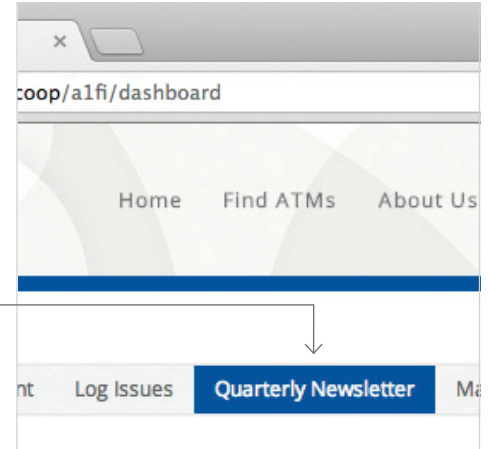
HOW TO ACCESS NEWSLETTERS

STEP
1

On the navigation bar rollover and click [Quarterly Newsletter](#)

STEP
2

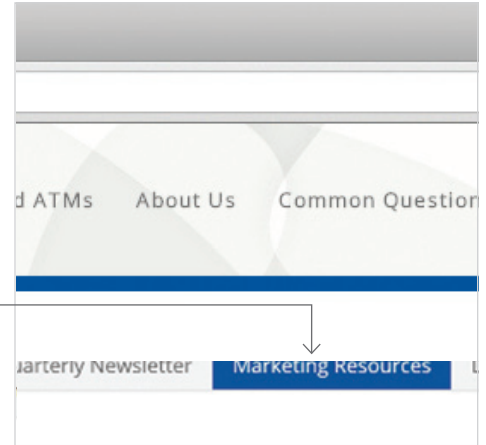
From the Quarterly Newsletter page you can click into each previously sent Alliance One newsletter



HOW TO ACCESS MARKETING RESOURCES

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

A screenshot of the Alliance One Marketing Resources page. The page title is 'Marketing Resources'. It features a navigation bar with links like 'Home', 'Find ATMs', 'About Us', 'Common Questions', and 'ATM Issues'. Below the navigation bar, there's a secondary menu with 'Marketing Resources' highlighted. The main content area includes sections for 'How to quick guide', 'Logo resources', 'ATM Locator App promo kit resources', 'Posters', 'QR codes', 'Statement stuffers', 'Table tents', and 'Web banners'. Each section provides links to various marketing materials. The page also includes a user greeting 'Welcome janedoe!' and a 'Logout' button.

Marketing Resources

How to quick guide

[How to quick guide for the Alliance One Web site and mobile app for participants](#)

Logo resources

Market your increased ATM presence to your cardholders. Encourage them to look for the blue and white Alliance One logo on ATMs.

Use [statement stuffers and signage](#) to keep your message at the forefront.

- Color version appears in Pantone® Reflex Blue.
- Black version appears in black only.

	For online use: color_GIF	For print use: ZIP file containing color_EPS
	For online use: black_GIF	For print use: ZIP file containing black_EPS
	For online use: color_GIF	For print use: ZIP file containing color_EPS

ATM Locator App promo kit resources

Posters

Keeping your money theme: [Poster 1](#) | [Poster 2](#) | [Poster 3](#) | [Poster 4](#)

Find closest ATMs theme: [Poster 5](#) | [Poster 6](#) | [Poster 7](#) | [Poster 8](#)

QR codes

Alliance One website: [blue](#)
iPhone mobile app: [black](#) | [blue](#) | [red](#)
Android mobile app: [black](#) | [blue](#) | [red](#)

Statement stuffers

[Statement stuffer 1](#) | [Statement stuffer 2](#) | [Statement stuffer 3](#)

Table tents

[Table tent 1](#) | [Table tent 2](#) | [Table tent 3](#)

Web banners

Standard: 250 x 250 Vertical: 160 x 600 Horizontal: 728 x 90 Horizontal: 300 x 250
Banner: 1: [one_line](#) Banner: 1: [one_line](#) Banner: 1: [one_line](#) Banner: 1: [one_line](#)

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

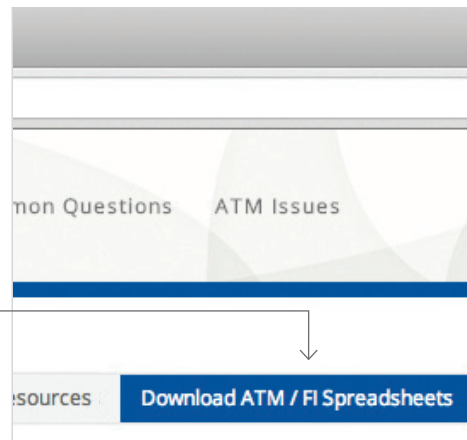
STEP
1

On the navigation bar rollover and click [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

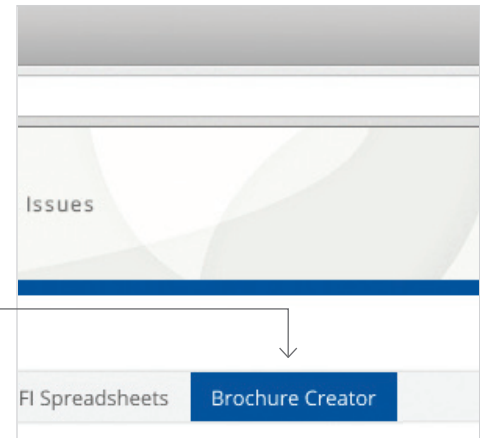


A screenshot of the Alliance One website's 'Download ATM/FI Spreadsheets' page. The page features the Alliance One logo, a navigation menu with 'Home', 'Find ATMs', 'About Us', 'Common Questions', and 'ATM Issues', and a secondary menu with 'Dashboard', 'My Account', 'Log Issues', 'Quarterly Newsletter', 'Marketing Resources', 'Download ATM / FI Spreadsheets', and 'Brochure Creator'. The main content area includes the heading 'Download ATM/FI Spreadsheets', instructions on how to download the files, and two buttons: 'Full ATM Listing Spreadsheet' and 'Full Financial Institution Spreadsheet'. A list of instructions for importing the CSV file into Microsoft Excel is provided at the bottom. The footer contains the copyright notice '© 2013 Alliance One | Privacy Policy'.

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:



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

STEP 5 Choose the search radius

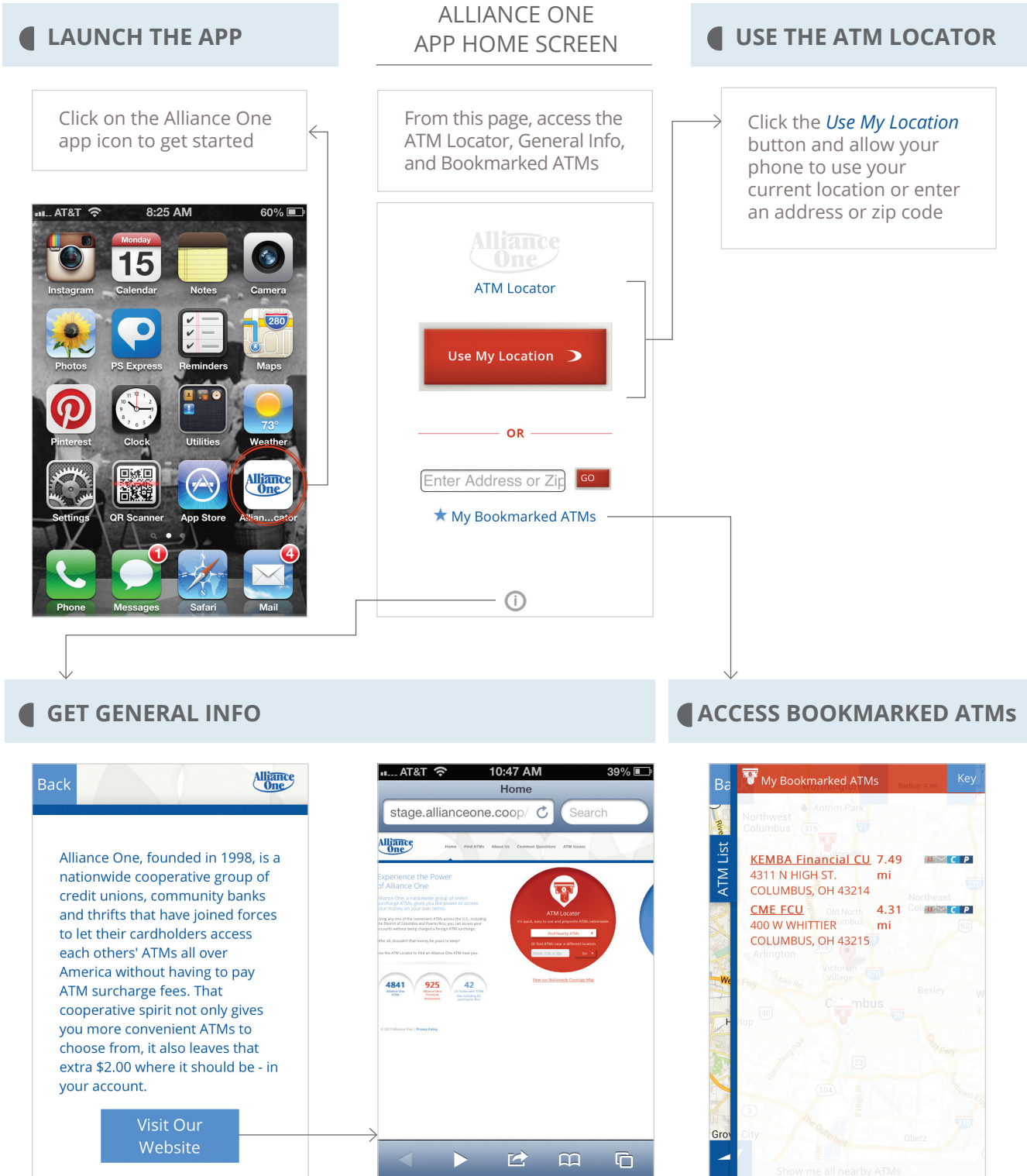
STEP 6 Click *Create Brochure*

A screenshot of the 'Brochure Creator' form. The form is titled 'FI Logo' and has three radio button options: 'Upload' (selected), 'Paste via URL', and 'None'. Next to 'Paste via URL' is a 'Choose File' button and the text 'No file chosen'. Below these options is a note: 'Please upload only JPG or PNG images @ 300ppi at least 500px wide.' The form continues with a dropdown menu for 'FI Name' showing '274975848 - A A FCU'. Below this are input fields for 'Search Address', 'City', 'State', and 'Zip Code'. At the bottom, there is a dropdown menu for 'Search Radius' showing '1 Mile' and a 'Create Brochure' button.

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

MOBILE APP USER BASICS

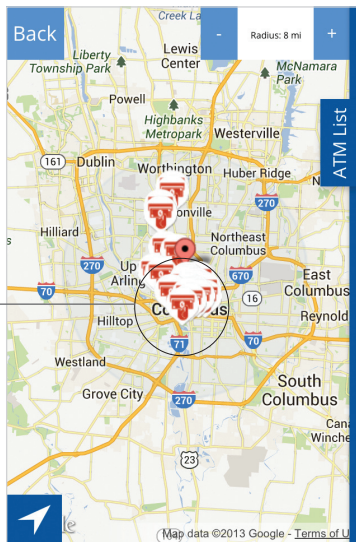
This is a general overview of the Alliance One mobile app functionality.



USE THE ATM LOCATOR (CONT.)

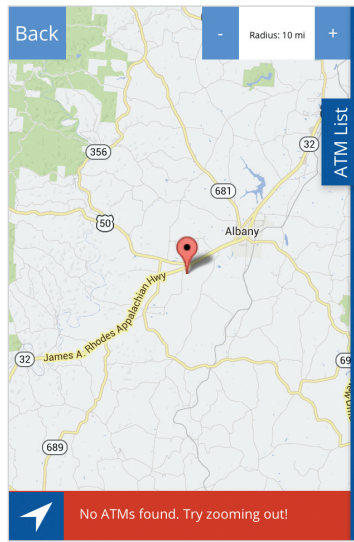
NEARBY ATMs

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.



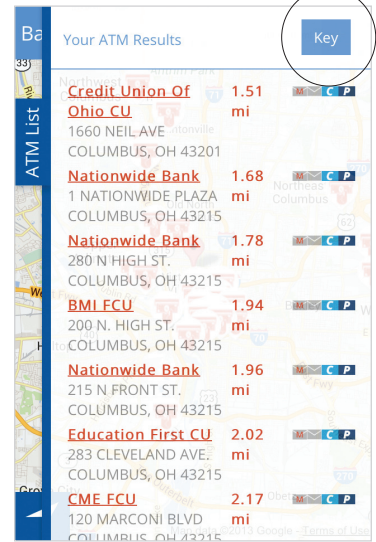
NO ATMs AVAILABLE

This screen appears when no ATMs are within your radius-user will need to increase radius to see ATMs.

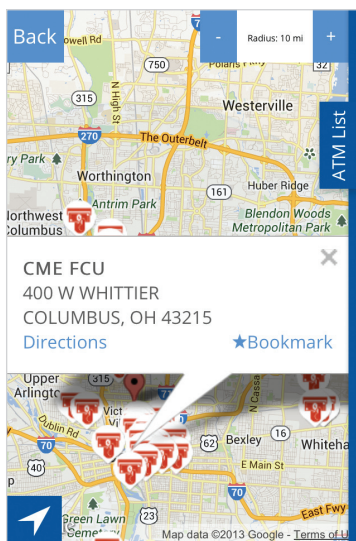


ATM LIST VIEW

Click ATM List to see a list view of the nearby ATMs



ATM DETAILS

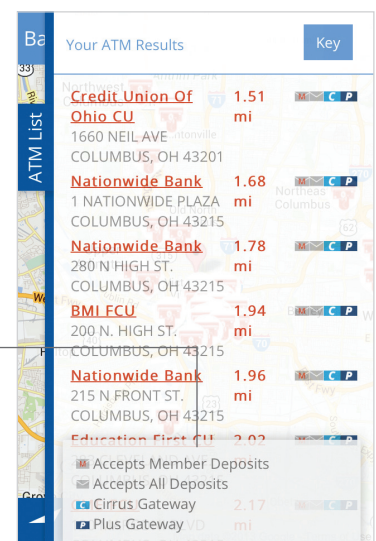


Click the x to close the info box, click Directions to get directions to this ATM, or click Bookmark to add this ATM to your list of Bookmarked ATMs.

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*

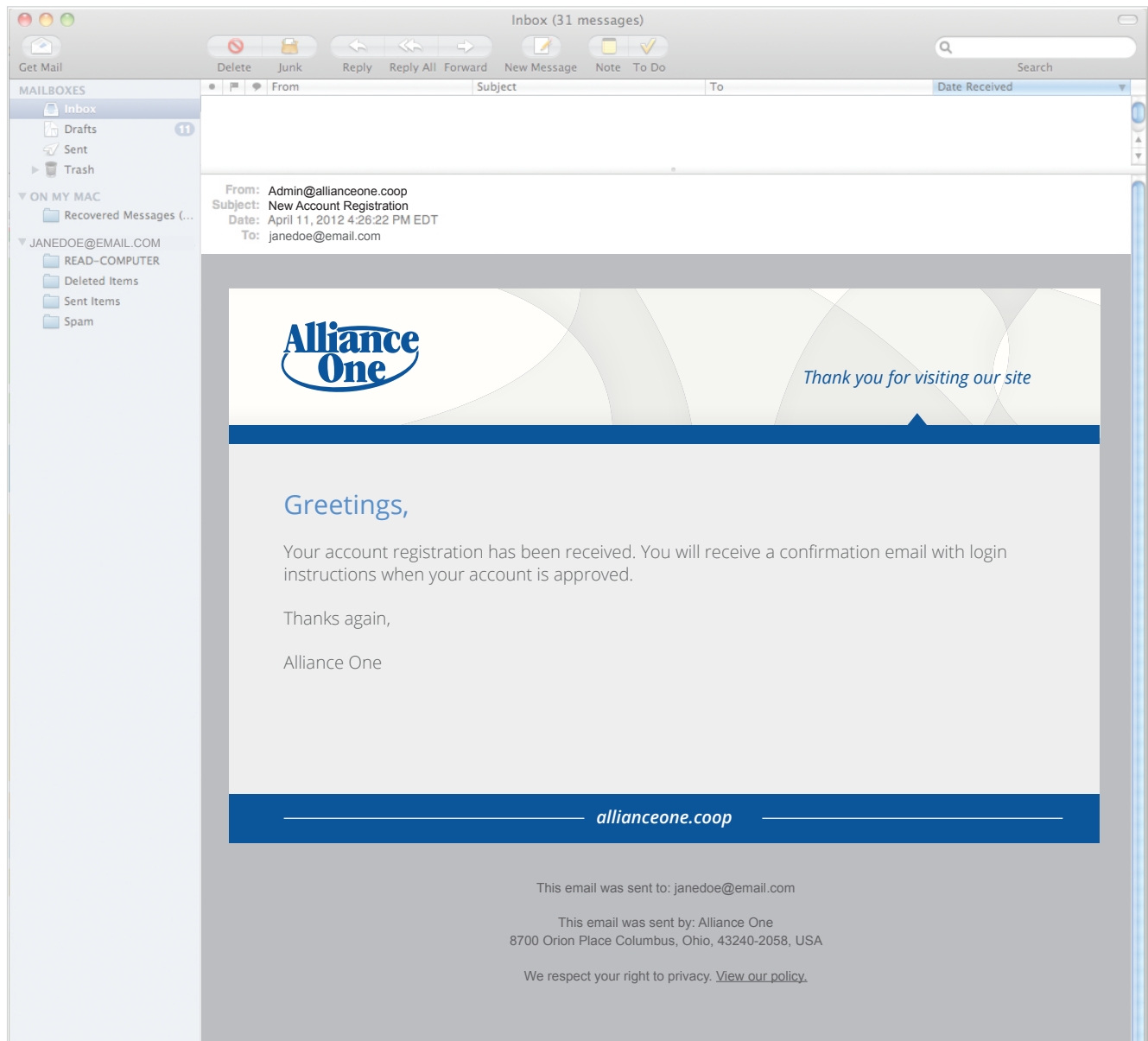
  = *Plus Gateway*

 = *No Public Access*

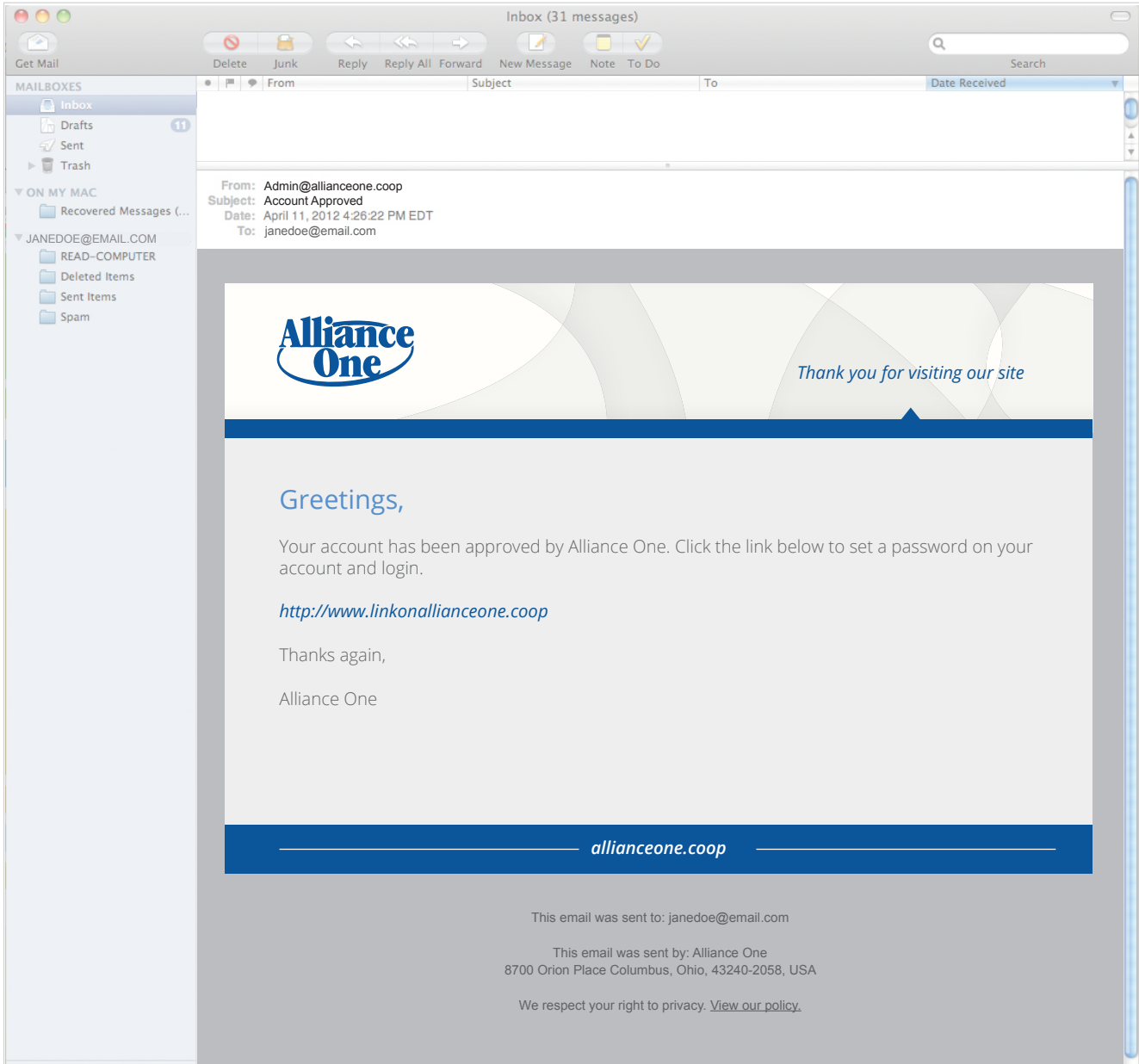
SITE GENERATED EMAIL EXAMPLES

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

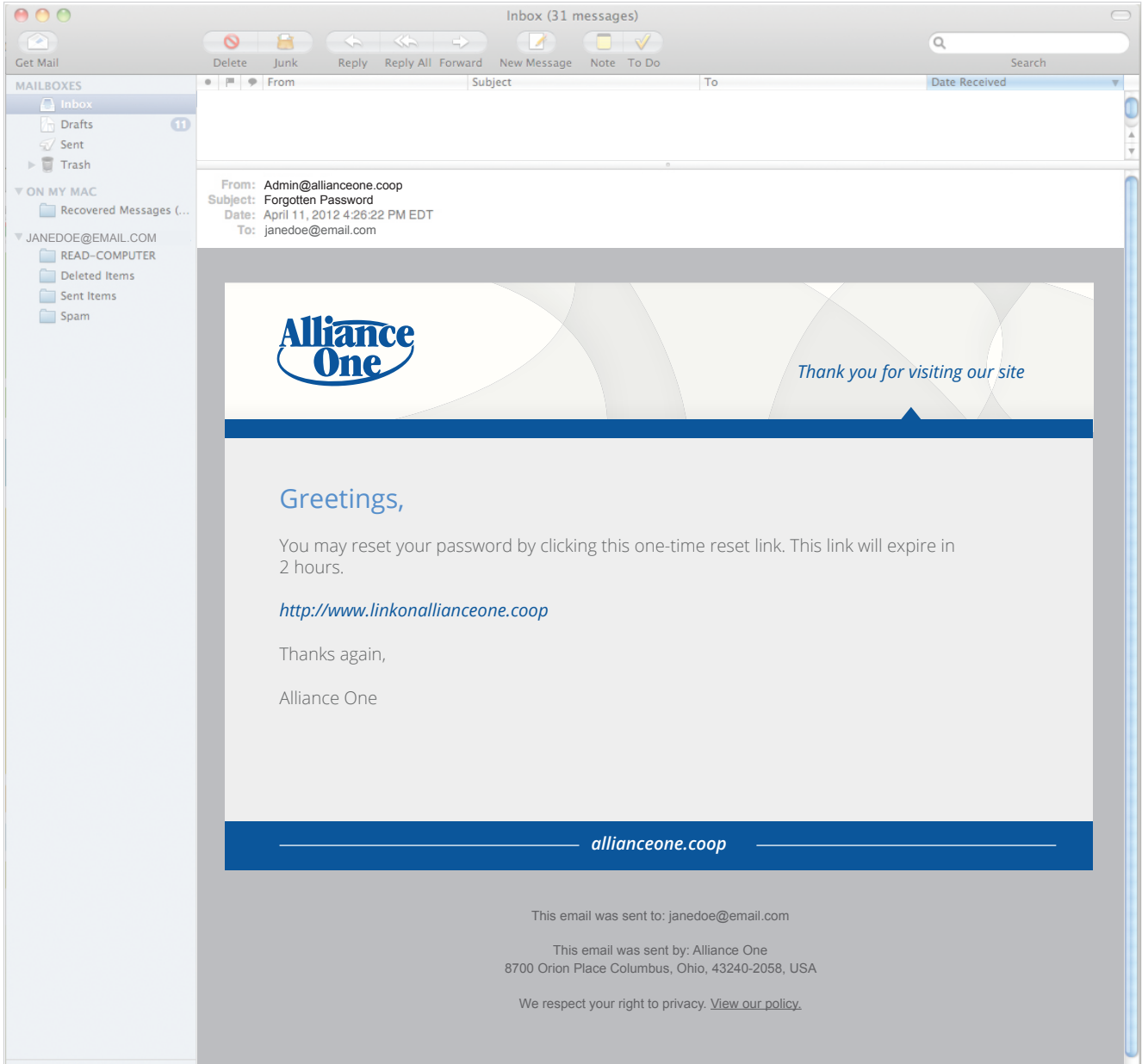
EXAMPLE 1: New Account Registration (the “waiting for approval” email)



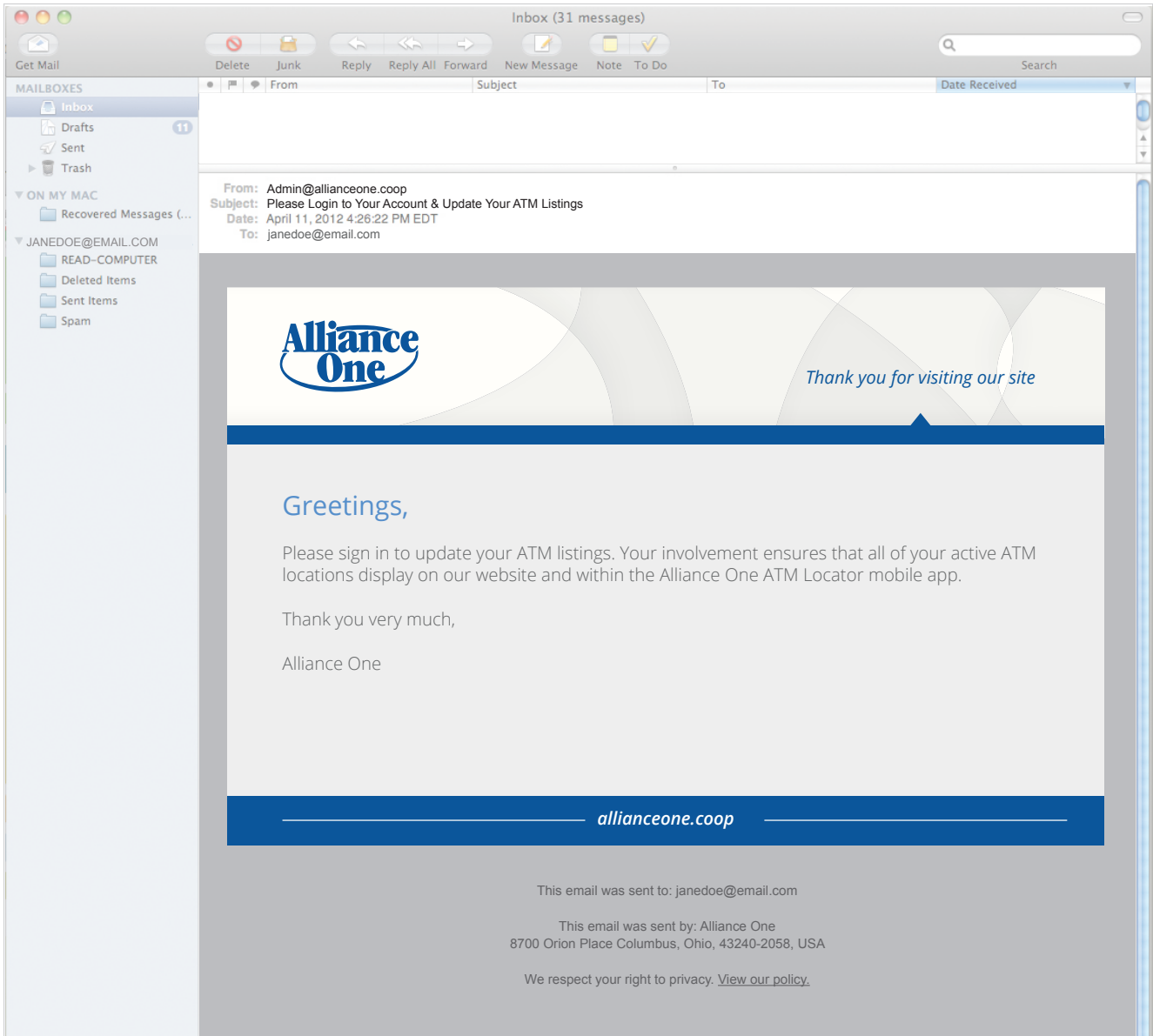
EXAMPLE 2: Account Approved



EXAMPLE 3: Forgotten Password



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



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 a 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:



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



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*.