

Website Reference Guide

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# **HOW TO LOGIN**

Your login credentials are your email address and password that was provided by Alliance One. Here's how to log in:

#### HOW TO LOGIN

HOW TO RESET YOUR PASSWORD

# HOW TO LOGIN



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



STEP



#### 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/user/login.	Join U
STEP 2	Click the <i>Forgot your password</i> link.	
		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 <i>Send Reset Instructions.</i>	
Forgot Password		
<b>O</b> Please e	nter your email address that is registered. You will be sent an email containing a link to reset your password	koo -
Email		

• 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 48 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 API Access Tokens, 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 20.

One	Home Find ATMs About	Us Common Questions	ATM Issues		Welcome Jane	Log
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#### WHAT IS THE ALLIANCE ONE API?

The Alliance One API offers read-only access to all participating Alliance One ATMs and their information (financial institutions, addresses, geolocations, and features). You can create an Alliance One ATM locator on your financial institution's website or mobile app. You can also combine Alliance One ATMs with any other ATM groups or networks your financial institution participates in. Basically, you're making it easier on your cardholders to find and access ATMs.

#### HOW TO REQUEST AND MANAGE API ACCESS

You can view your API tokens on the dashboard. From the dashboard you can setup and manage tokens, setup and manage API users, and view your API documents.

#### **HOW TO REQUEST API ACCESS**

HOW TO SETUP AND MANAGE TOKENS

HOW TO SETUP AND MANAGE API USERS

**VIEWING API DOCUMENTS** 

#### HOW TO REQUEST API ACCESS



Dashboard My	User ID	Log Issues	Newsletter	Marketing Resources	Create ATM Locator Brochures	Download ATM / FI Spreadsheets	Due Diligence and FAQs
<b>Smith Fin</b> R&T Number: 123456 1234 W Smith Avenuu Columbus, OH 54321 Tel: (123) 456-7890	anci <sup>5789</sup>	al Co.					
API Access Integrate Alliance C names. <u>View API Dr</u>	One ATMs ocumentat	into your web: tion	site or mobile a	pp with the Alliance One	API. The API offers read-only access	to ATM addresses, geolocations, fea	tures (gateways, accessibility), and financial institution
Request API Ac	cess	<					
STEP 2	In t	the "API	Access"	area on your	dashboard, click <i>Re</i>	quest API Access.	

# HOW TO REQUEST API ACCESS (CONT.)

STEP 3

Provide an authorized signer's name, email, and title. The authorized signer will be allowed to sign the API agreement and designate the initial API users.



The requester will receive a confirmation email.



The designated authorized signer will get an automated preliminary email from Alliance One explaining that an email from DocuSign will be sent to them containing an agreement and user form for the Alliance One API.



The authorized signer will receive an API Addendum and user form via DocuSign to complete. Once completed, API access will be approved on the site within 1–2 business days. API users will receive a notification that their access is approved.



From there, log into *http://www.allianceone.coop* to get started.

# HOW TO SETUP AND MANAGE TOKENS STEP API users can log into *http://www.allianceone.coop* and create an API token from their dashboard by clicking *Create New Token*. Give the token a unique name. API Access OCreate a token to start using the API. Once the token is created, it should be visible to the API user. API Access API Token Expires ABCDEF123456 190902E690125E94F6 September 2, 2020 × valio



Create New Token Manage API Users View API Documentat

Next, you will receive an email with documentation for your new token. Provide your token and a link to the documentation to your development team. Simply forward this information to your development team, and they'll update your API calls.

STEP 4

API Tokens are good for one year. API users receive an email from Alliance One 30 days to the expiration of the existing token and are provided with a new auto-generated token.



#### HOW TO SETUP AND MANAGE TOKENS (CONT.)



Developers will want to update their programming with the new token. Once that is complete, the expiring token can be deleted. API users can log into the Alliance One Portal and delete the expiring token, by clicking the *Delete* icon just to the right of the token expiration date.

PI Access				$\downarrow$
Label	API Token	Status	Expires	
ABCDEF123456 📝	190902E690125E94F6	valid	September 2, 2020	× Delete

#### HOW TO SET UP AND MANAGE API USERS



# **VIEWING API DOCUMENTS**

STEP 1

Clicking on *View API Documentation* will provide API users with a resource repository that includes available API formats, parameters, results schemas, an API builder tool, and API branding.

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Alla	lance One API (version 1)	_					
Da	ashboard My User ID	Log issu	es Newsletter Marketing Resources (	Create ATM Locator Brochures Download ATM / R Sp	preadsheets Due Diligence and FAQs		
	10						
	liance One API						
Fort	the convenience of our Fina	ancial insti	tution partners. Alliance One offers partner ATM	f data available via an APL			
Aut	thentication						
Alt Al	API requests must include y	our API To	ken. For more information in acquiring your tok	en, please contact <u>allanceonesuoport@allanceone.coo</u>	<u>a</u> .		
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## **VIEWING API DOCUMENTS** (CONT.)



Clicking the *API Builder Tool* provides a ready-to-use call that can be dropped into your application or website.

API	Builder Tool
To a	assist with getting started with the Alliance One API, we l
API	Access API Builder Tool
Plea	ase use one of the <u>Alliance One images</u> if you'd like to di

#### Alliance One API Builder

To assist with getting started with the Alliance One API, we have provided a builder tool to customize and create a ready-to-use call that can be dropped into your application or website.

API Token	ABCDEF123456 (190902E690125E94F6)	•
View Results As	Results as HTML	٣
Optional Filters		
RT Number		
Deposits Accepted	Both Member and Public Deposits	۳
Cirrus Gateway	Any Cirrus Status	۳
Plus Gateway	Any Plus Status	٣
Public Access	Any Public Status	•
Ontional Geolocatio	P.	
Latitude		
Longitude		
Search Radius	50 Miles	٣
Address Lookup		
City Lookup		
State Lookup	Any State	٣
Zip Code Lookup		
Compiled URL, ready to	deploy given the settings above:	
,		
https://allianceone.	coop/alapiv1/atm?token=190902E690125E94F6	
View Results		

#### **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

Find t the da	he ATM you want to edit in the ashboard.	list on	
As &T Number 23456789 2 dd New ATM	Address City 1234 W SMITH AVE	State	Features
Next t the Ea	o the R&T Number, rollover an lit icon.	d click	
Make	the edits to the ATM Listing.	Address For physic Address For specia	1 cal street addresses only. This will be used to display your ATM on the L 2 al instructions, such as "in the lobby"
Click S	ave.	City County State	· · · · · · · · · · · · · · · · · · ·
• Your eo Alliance as peno	lit has been made and sent to e One for approval and shows u ding approval on the dashboard	Zip Country Accept M Yes © No Accept Al Yes © No	III Deposits
		Public Ves No	

# HOW TO DELETE AN ATM



## HOW TO ADD AN ATM

STEP 1	On the left side of th and click the <i>Add Ne</i>	ne dashboard, rollove w ATM icon.	er		
My ATMs R&T Number	Address	City	State	Features	
123456789 + Add New ATM	1234 W SMITH AVE	ung	Juic		×

# HOW TO ADD AN ATM (CONT.)

completely.

Fill out the ATM Listing form

STEP 2

> Address1 For physical street addresses only. This will be used to display your ATM on the Locator Map. Address2 For special instructions, such as "in the lobby" City County State ..... ۳ Zip USA Country Accept Member Deposits ○ Yes No Accept All Deposits ○ Yes No Public ○ Yes No Plus\_gateway O Yes

No
 Cirrus\_gateway
 Yes
 No
 Terminal\_id
 Terminal Driver
 Other --

ATM Status • Yes • No ۳

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

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 the dashboard.	to edit in the list	on				
My BINs BIN Num 12345678 + Add New	ber R&T Number 19 2 00000000003 BIN	Length	Card Type		BIN/ISO		I
STEP 2	On the right side of the and click the <i>Edit</i> icon.	e dashboard, roll	over			→ 9 2 1	
STEP 3	Make the edits to the I	BIN Listing.		N		16	
STEP 4	Click <i>Save</i> .		C	ard Type Visa	•	]	
• You Alli as	ur edit has been made an ance One for approval ar pending approval on the	d sent to nd shows up dashboard.		rpe 3IN Save	•		

# HOW TO DELETE A BIN

Find the d	the ATM you want ashboard.	to delete in the	e list on		
3INs BIN Number 123456789 Add New BIN	<b>R&amp;T Number</b> 00000000003	Length	Card Type	BIN/ISO	×
P On thand c	ne right side of the click the <i>Delete</i> icon	e dashboard, rol n.	llover		

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

Accidentally delete an BIN? You can re-add the deleted BIN by simply completing the steps to Add a BIN.

# HOW TO ADD A BIN

STEP 1	On the left side of th and click the <i>Add Ne</i> r	ie dashboard, rollove <i>w BIN</i> icon.	er			
My BINs BIN Number	R&T Number	Length	Card Type	BIN/ISO		
123456789 + Add New BIN	0000000003	9m			×	

# HOW TO ADD A BIN (CONT.)



• 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 on the dashboard.	to edit in the list		
All Employees Title CEO/Manage	r Jane	Last Name Doe	<b>Email</b> janedoe@email.com	
STEP 2	On the right side of the dashl and click the <i>Edit</i> icon.	ooard, rollover		
STEP 3	Make the edits to the Employ Listing.		Email	
STEP 4	Click <i>Update.</i>		irst Name ast Name ob Title 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 Find the employee you want to delete in the list on the dashboard. All Employees Title First Name Last Nam Email CEO/Manager janedoe@email.com Jane Doe **Z** × 🛔 Invite Employee



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? You can re-add them by simply completing the steps to Invite an Employee.

# HOW TO INVITE AN EMPLOYEE



On the left side of the dashboard, rollover and click *Invite Employee* and fill in their information.

Title	First Name	Last Name	Email	
CEO/Manager	Jane	Doe	janedoe@email.com	<b>Z</b> ×

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


# HOW TO EDIT YOUR NAME, JOB TITLE OR EMAIL



On the navigation bar rollover and click *My User ID.* 



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

STEP 2	Make the edits to your Employee Listing.		My Profile				
			Dashboard	My User ID	Log Issues	Newsletter	Mar
		>(	Email				
			First Name				
			Last Name				
STEP			Job Title				
3	Click <i>Update.</i>	 ×	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



On the navigation bar rollover and click *Log Issues.* 

ce	Home
My User ID	Log Issues

# HOW TO LOG AN ISSUE (CONT.)

STEP 2	Fill out the form completely.	
		Email
		Explain Issues Here
		Cardholder Name
		Transaction Date
		Time of Day
		Terminal ID
		ATM Address
		Surcharge Institution Name
		Withdrawal (Including Fee)
		BIN
		Transaction ID
STEP 3	Click <i>Submit.</i>	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







## HOW TO CREATE A BROCHURE FOR YOUR FI

From the ATM Locator Brochure 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:

		n	Questions	ATM Issues
STEP 1	On the navigation bar rollover and click <i>Create ATM Locator Brochures.</i>		~	
_		$\rightarrow$	Create ATM	Locator Brochures
STEP 2	Upload the Financial Institution logo.			
			Add usur EPe Logo fortion	.p.
3	Choose the radius.		Vupload	cose File No file chosen
			Use high resolution jpg or prigi	mages for best results (300 DPI, at least 500 px wide)
STEP	Click Create Brochure.	_	Address	IF AT IM FEQUID-
4			State	
	• The brochure has been created and		Zip Code	
	a PDF will automatically download on your computer.		Radius 1 Mile	•
			Create Brochur	e

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



# GLOSSARY

This is a list of icons that are commonly used throughout the website and in this guide.

# 



= Pending approval from Alliance One





= Accepts Deposits



= Cirrus Gateway



= Plus Gateway

= No Public Access