

# Coast Capital Digital Banking App Overview

Use this guide if you're accessing digital banking through our mobile app.

Coast Capital's award winning digital banking app is safe, secure and full of tools to help you manage your finances. We're bringing you some tips to help you learn to use commonly used features and get the most from our digital banking experience.

## Download the App

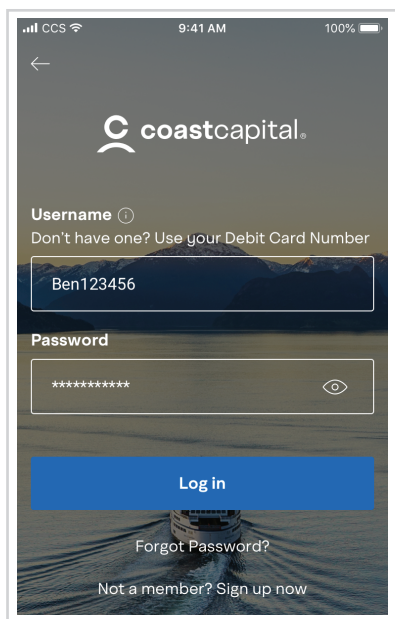


Search for Coast Capital in the App Store (if you're using an iPhone) or Google Play (if you're using an Android phone) and look for the Coast Capital app icon with a white background.

## How to Log In

When you open the app, you will be asked for your Username and Password. If you haven't set these yet, fill in the Username field with the last 8 digits of your debit card and use your 7 digit Personal Access Code as your password. You will then be prompted to set a Username and Password that adheres to our security requirements. Once they are set, you will use them to log in moving forward.

If you don't have a username, use the last 8 digits of your debit card.

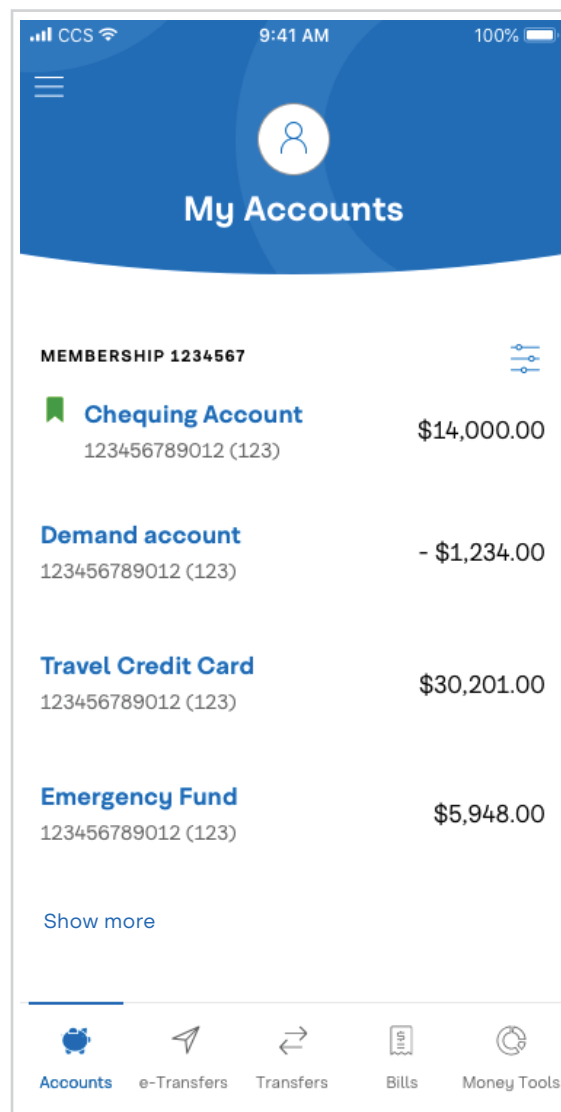


If you don't have a password yet, use your 7 digit Personal Access Code.

# Coast Capital Digital Banking App Overview

## Accounts Screen Overview

The Accounts Screen is the first thing you see after you log in. It makes it easy to check your balances and perform popular transactions.



Click "**Show more**" to view more accounts

To get back to this screen at anytime, click "**Accounts**"

Overview of your accounts

Quicklinks to popular functions

# Coast Capital Digital Banking App Overview

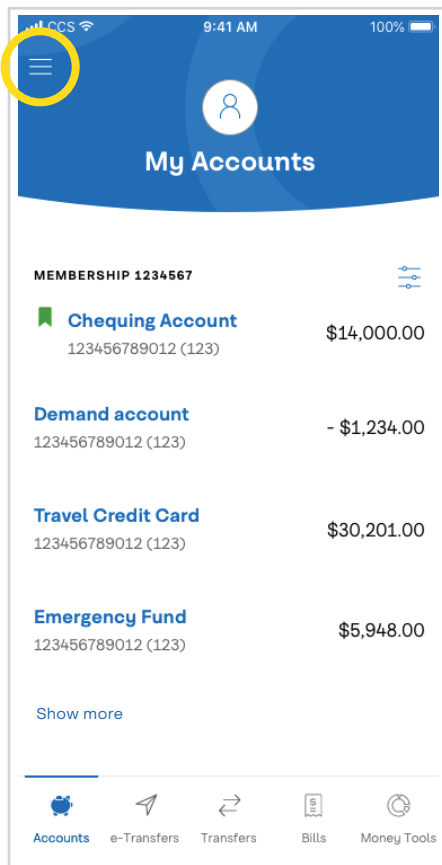
## Pay Bills

Paying your bills online is quick and easy with Coast Capital's app. Here's how you do it.

### Open the Pay Bill section

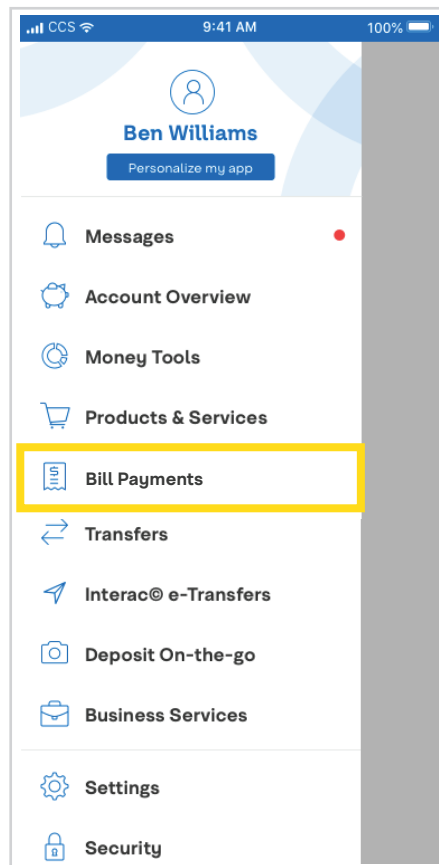
#### Step 1

Tap (☰) to open the menu



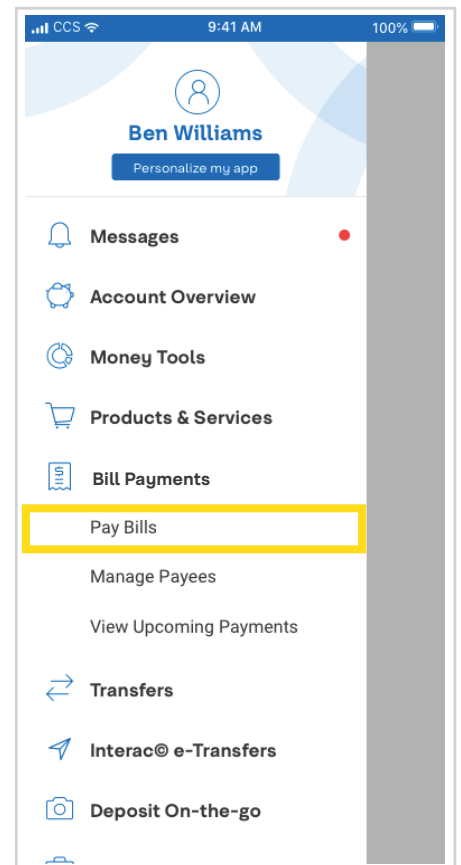
#### Step 2

Tap "Bill payments"



#### Step 3

Tap "Pay bill"



# Coast Capital Digital Banking App Overview

## Make your payment

CCS 9:41 AM 100%

Pay Bill

Make Payment Recurring Payment

**Pay from**

Demand account  
123456789012 (123)  
\$12,062.12

**Pay to** Add new payee

Select a Bill/Payee

**Amount**

\$

**Pay date**

Pay another bill

Continue >

Please note: To ensure your payments are received by the vendor before their due dates please forward payment 2 to 3 business days in advance of the due date to allow for processing time.

Accounts e-Transfers Transfers Bills Money Tools

1 Tap here to open a list of your accounts. Select which account to pay your bill from.

2 Enter amount

3 Click here if you want to pay another bill

4 Click “**Continue**” when you’re ready to pay

You will be prompted to review and confirm your bill payment. After confirming, you will get a confirmation receipt that you can email to yourself if you like.

## View Transaction History

- From the “Accounts” screen, tap on the account you’d like to view the history for.
- To view more than the default 15 days, tap on the (Q) and fill in the search fields depending on your needs:

View an entire month by updating this field



Transaction search

Transactions from

May-01-2018

To

Jun-01-2018

Monthly filter

Select a month

Statement filter

All Statements items

Search

View a specific date range by updating these fields

Use this field if you want to filter your search further (ex. Deposit only)

# Coast Capital Digital Banking App Overview

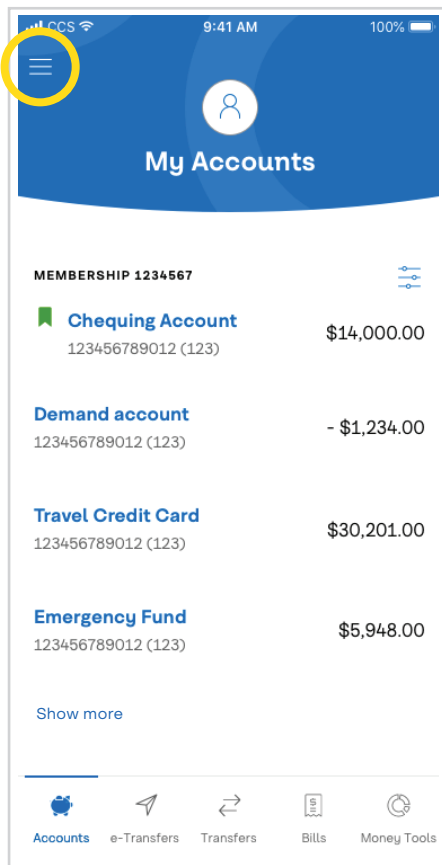
## Transfer Between Your Accounts

This is how you transfer funds between your own Coast Capital accounts.

### Open the Transfer section of the app

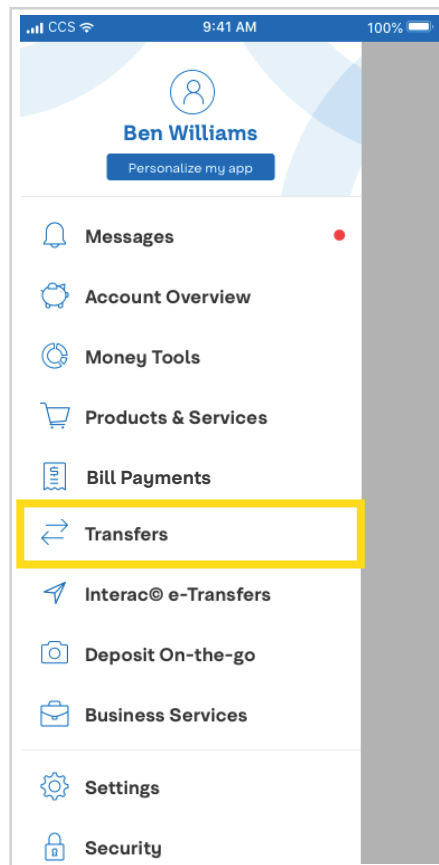
#### Step 1

Tap (☰) to open the menu



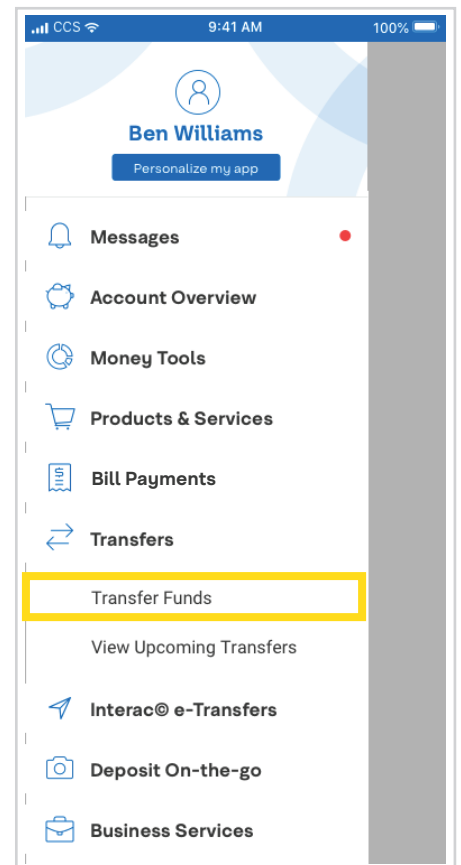
#### Step 2

Tap "Transfers"



#### Step 3

Tap "Transfer Funds"



# Coast Capital Digital Banking App Overview

## Send the transfer

The screenshot shows the 'Transfer Funds' screen in the Coast Capital Digital Banking App. The screen is divided into several sections: 'Transfer from' (Chequing Account, 1000000000012345, \$550.25), 'Transfer to' (My own accounts), 'Beneficiary account' (Select an account), 'Amount' (Insert amount), 'Schedule transfer' (Immediate transfer, Scheduled transfer, Recurring transfer), and 'Memo (Optional)'. A green 'Continue' button is at the bottom. A bottom navigation bar includes Accounts, e-Transfers, Transfers, Bills, and Money Tools.

1 Tap here to open a list of your accounts. Select which account to transfer from.

2 Select the account you want to transfer to

3 Specify the transfer amount

4 If desired, update the schedule for the transfer and add a memo

5 When you're ready, tap "Continue"

You will be prompted to review and confirm your transfer. After confirming, you will get a confirmation receipt that you can email to yourself if you like.

# Coast Capital Digital Banking App Overview

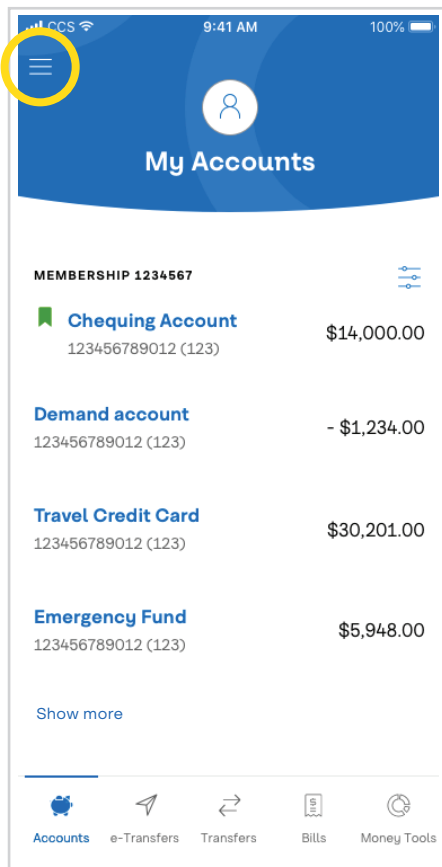
## Send a Transfer to Another Member

To transfer to another Coast Capital member, you will need to have their membership number ready.

### Open the Transfer section of the app

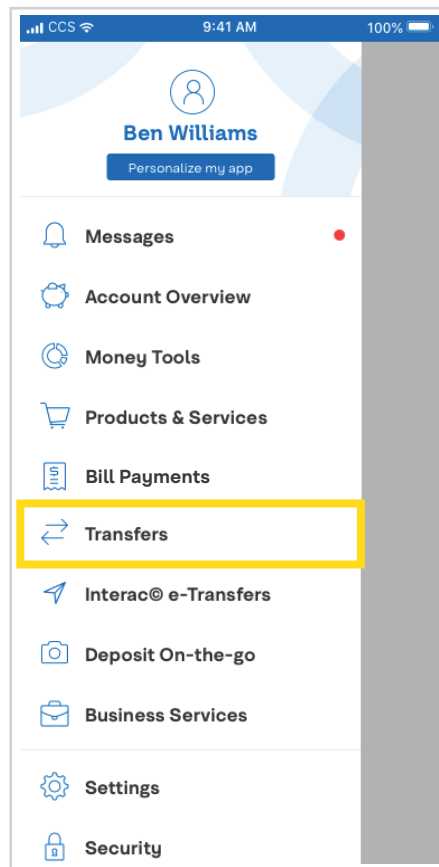
#### Step 1

Tap (☰) to open the menu



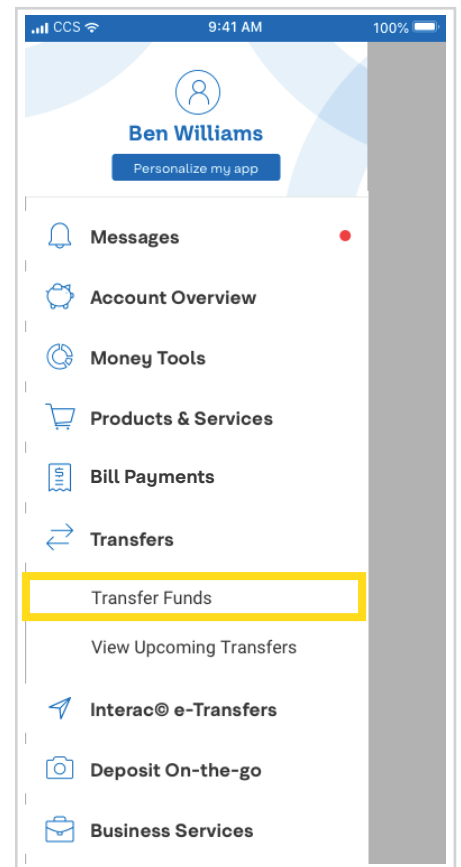
#### Step 2

Tap "Transfers"



#### Step 3

Tap "Transfer Funds"





# Coast Capital Digital Banking App Overview

## Send the transfer

Transfer Funds

**Transfer from**

Demand account  
100000000001234  
\$12,062.12

**Transfer to**

My own accounts

Another Coast Capital Savings member

**Membership number**

Insert number

**Amount**

Insert amount

**Schedule transfer**

Immediate transfer

Scheduled transfer

Recurring transfer

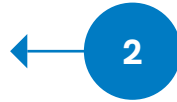
**Memo (Optional)**

Continue

Accounts e-Transfers **Transfers** Bills Money Tools



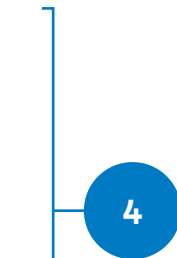
Tap here to open a list of your accounts. Select which account to transfer from.



Tap to change the transfer to “**Another Coast Capital Savings member**”. A new field will show where you will enter their Coast Capital membership number.



Specify the transfer amount



If desired, update the schedule for the transfer and add a memo



When you're ready, tap “**Continue**”

You will be prompted to review and confirm your transfer. After confirming, you will get a confirmation receipt that you can email to yourself if you like.

## Quick Tips for Digital Banking Success

You've got questions, we've got answers. Here are answers to some common questions we've received.

### Using one-time security codes

- One-time security codes are part of our enhanced security and help us verify that it's you performing a transaction.
- It's a 7 or 8 digit number that we will send you through a text message to your mobile phone or through email when you perform certain types of transactions. You will only need to use the number once, so don't worry about remembering it.
- When a one-time security code is required, you will see a screen that looks like this:

One more step. Just making sure it's really you.

Mobile Phone | Email

Enter code we've sent to your phone

A SMS has been sent to your phone \*(\*)\*-1234 with an one-time security code to validate this transaction. Please enter the code in the box above.

If you have not received the code within 1 minute [click here to resend the one time security code.](#)

Confirm

← Check your text messages or email for the security code we sent you. Then reopen the app and enter it here.



**Tip:** If you didn't receive the email, make sure to check your junk folder.

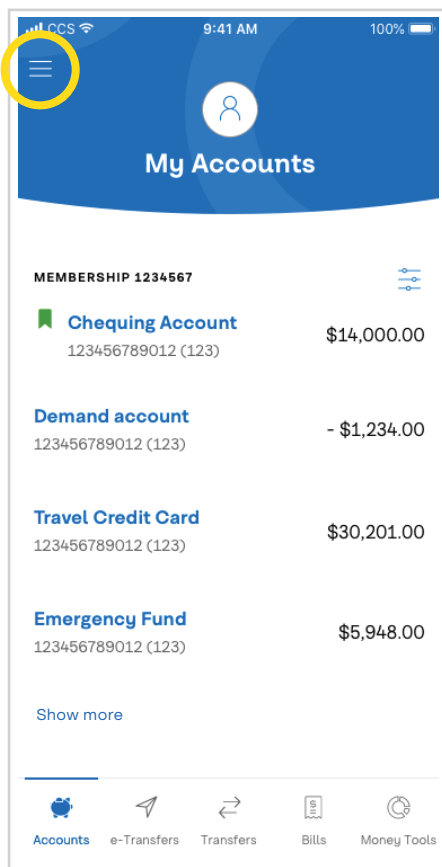
# Coast Capital Digital Banking App Overview

## How to Change Your Password

### Open the Security section

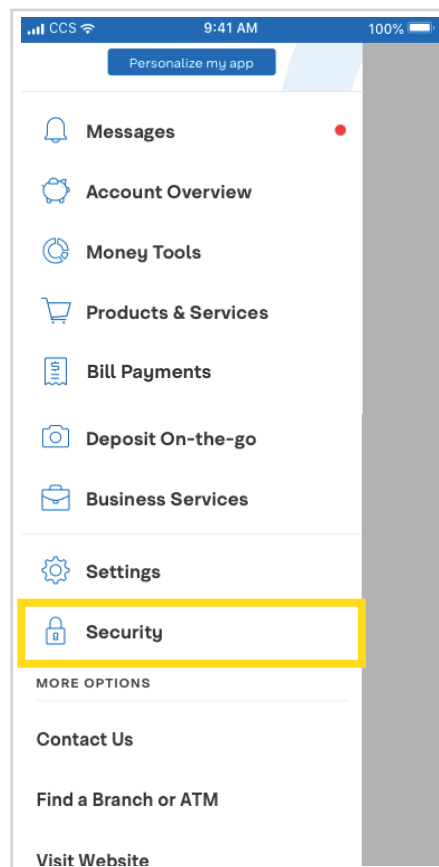
#### Step 1

Tap (☰) to open the menu



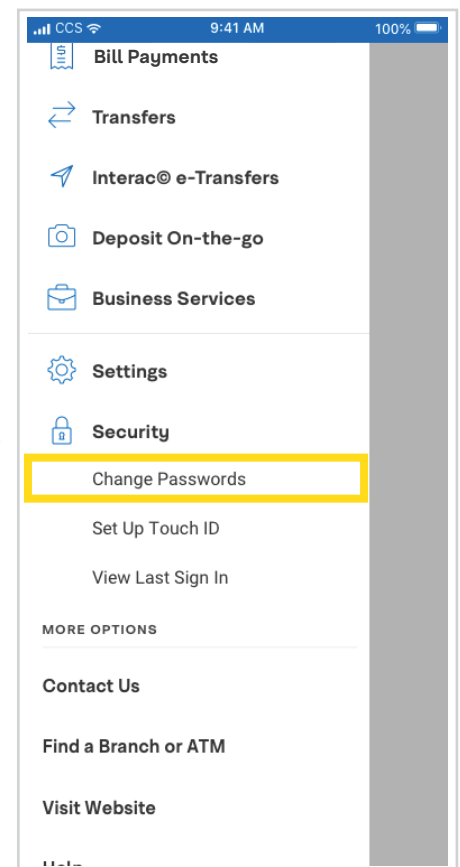
#### Step 2

Tap “Security”



#### Step 3

Tap “Change Password”



# Coast Capital Digital Banking App Overview

## Create your new password

Old Password

New Password

We recommend choosing a passphrase longer than 20 characters or an alphanumeric password longer than 10 characters with a mix of uppercase, lowercase and special characters.

Password strength: Weak

Confirm Password

Confirm

1 Enter your old password

2 Create a new password

3 Confirm your password by re-entering it

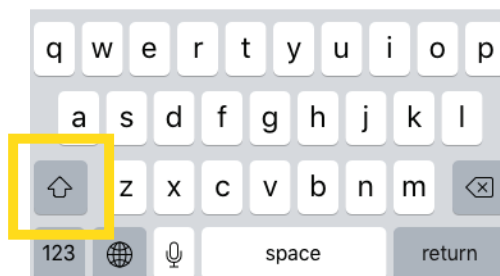
4 Click “**Continue**”

- Passwords need to be a minimum of 10 characters and contain one uppercase letter and one special character (!, ?, \$, etc.)



**Tip:** For security purposes, don't write your password down. Use an online password manager instead.

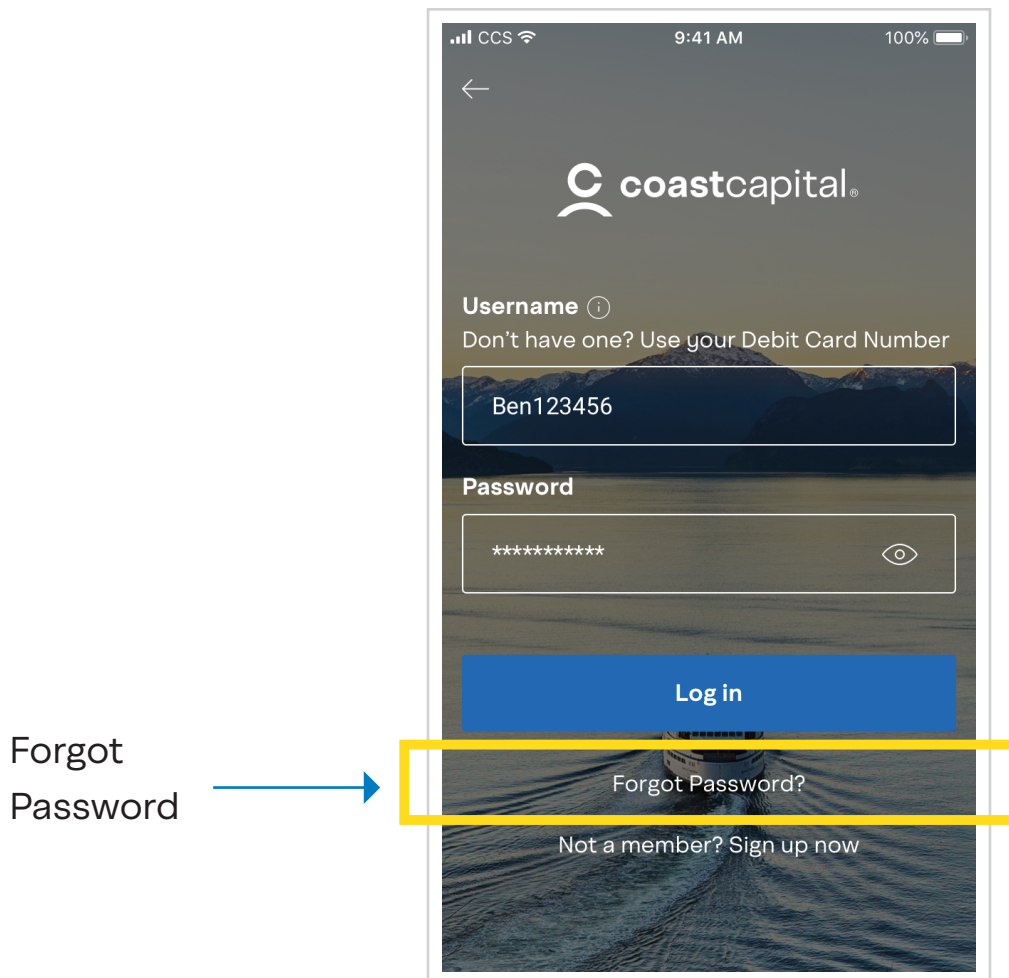
- To type an uppercase letter through the app, press the Shift key on the keyboard:



# Coast Capital Digital Banking App Overview

## What to do if you forget your password

- If you enter your password incorrectly three times your account will be locked
- You can click **“Forgot Password”** to access our self-serve reset feature to set a new password. We can also help you reset it in a branch or through our Contact Centre.



For more help with digital banking, visit [coastcapitalsavings.com/digitalsupport](https://coastcapitalsavings.com/digitalsupport) or contact us by phone at 1.888.517.7000. We're here to help.