

# Online Banking Mobile App Guide



# Table of Contents

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Mobile Basics.....	4
Login Page.....	4
Logging In .....	5
Confirmation Code .....	5
Unable to Be Reached .....	5
Challenge Question .....	6
Forgot password.....	6
Navigation .....	7
Landing Page – Account Summary .....	7
Account Details.....	8
eStatements .....	9
Stop Payments.....	11
Transfers.....	12
Payment/transfer Activity .....	14
External/Unlinked Accounts.....	15
Verifying .....	17
Bill Pay .....	19
Enrollment .....	19
Add new biller.....	22
Make a Payment.....	23
Rush Delivery .....	23
eBills .....	24
Activity Section .....	24
History .....	25
ACH .....	26
Participants.....	26
Create Participants Individually.....	27
Editing / Deleting Participants.....	29
Searching by Group for Participants.....	30
Templates .....	31
Adding a Template.....	31
Adding Participants.....	31
Editing a Template.....	35

Deleting A Template .....	36
Scheduling a Batch Payment with a Template .....	37
Pass-Thru .....	38
Viewing the detail of the pass thru .....	39
Deleting a Future Dated Pass Thru .....	39
Import.....	39
Participant Templates.....	39
Import from CSV File .....	41
Import Templates and Participants From A NACHA File .....	42
Wires.....	42
Adding Payees .....	43
Managing Payees.....	44
Single Wire Transfer .....	44
Multiple Wire Transfers.....	45
Wire Activity .....	46
Setting up Fingerprint / Face ID.....	48
Fingerprint / Face ID Does Not Already Exist .....	48
Fingerprint / Face ID Already Exists.....	49
Enroll the device in Touch/Face ID Enrollment .....	50
Log in using Face/Touch ID.....	51
Fast Balances .....	52
View Fast Balances .....	53
Mobile Deposits.....	53
View Deposit History .....	54
Check Images.....	54
Text Banking Commands .....	54
Stopped Numbers.....	55

# Mobile Basics

Before accessing the app, the user will need to have an existing My Access account.

There are actions that cannot be performed on mobile. Below is a listing of actions and where they can be performed.

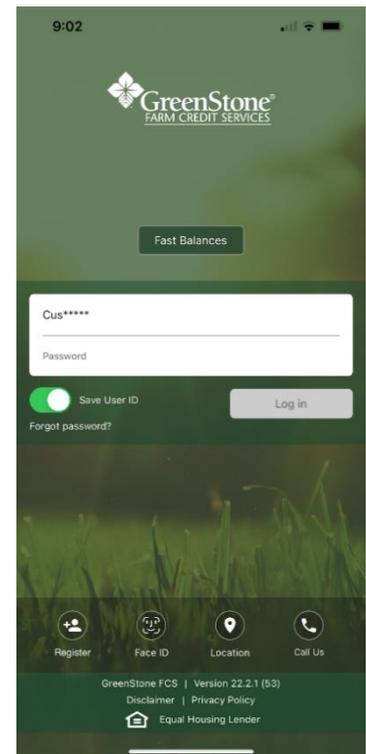
	Mobile	Desktop
Register*	X	X
Use Forgot Password*	X	X
Enroll Touch/Face ID Devices	X	
Add Fast Balance Devices	X	
Use PayNow		X
Use WebConnect		X
View eStatements	X	X
Add/Verify External Accounts	X	X

*Users must first log in through the desktop version to set up challenge questions and sign Terms of Service before using the mobile app.*

## Login Page

The login page contains the following information:

- **Fast Balances** which show a list of accounts and their balances that the user has set up to display.
- **User ID** and **Password** fields.
- **Forgot Password** link which brings the user to the Forgot Password page on My Access.
- **Register** link that allows the user to register for a new account through My Access.
- **Fingerprint** or **Touch/Face ID** allows the user to log into online banking using the fingerprint or face id that has been set up on their phone previously,
- **Location** displays GreenStone’s locations page in a new browser window.
- **Call Us** brings up the association phone number to quickly start a phone call.



# Logging In

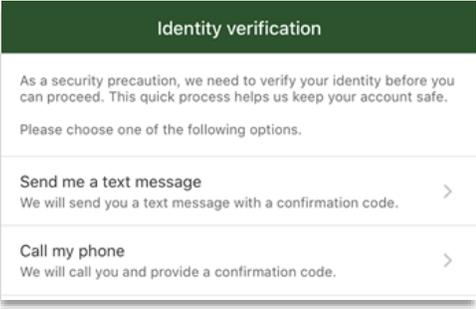
Logging into the mobile app for the first time, the user is prompted in one of two ways:

- Receive a phone call or text message to the phone number on the primary's contact record with a confirmation code
- Enter a challenge question

*If the user logs in successfully on one device then logs into a different device on the same network, they are not going to be challenged.*

## Confirmation Code

**Identity Verification** Send me a text message



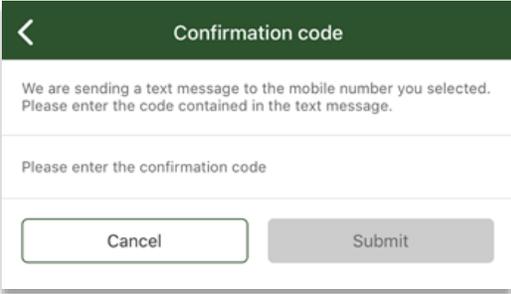
**Identity verification**

As a security precaution, we need to verify your identity before you can proceed. This quick process helps us keep your account safe.

Please choose one of the following options.

**Send me a text message**  
We will send you a text message with a confirmation code. >

**Call my phone**  
We will call you and provide a confirmation code. >

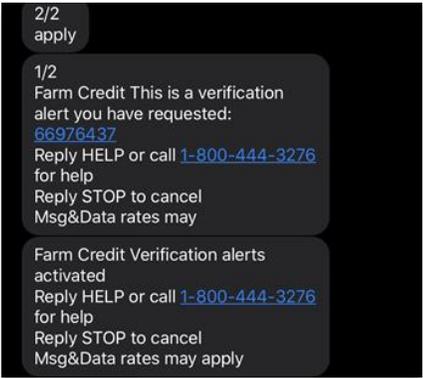


**Confirmation code**

We are sending a text message to the mobile number you selected. Please enter the code contained in the text message.

Please enter the confirmation code

**Text message received**



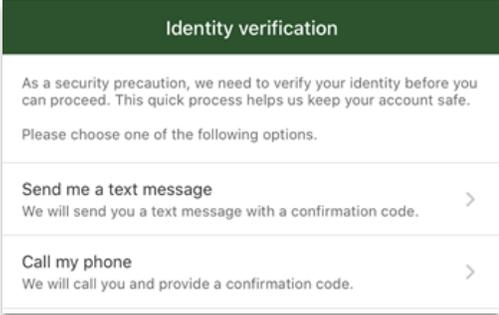
2/2 apply

1/2 Farm Credit This is a verification alert you have requested: [66976437](#)  
Reply HELP or call 1-800-444-3276 for help  
Reply STOP to cancel  
Msg&Data rates may apply

Farm Credit Verification alerts activated  
Reply HELP or call 1-800-444-3276 for help  
Reply STOP to cancel  
Msg&Data rates may apply

## Unable to Be Reached

If the customer does not have access to the phone number on file, they must select the **I cannot be reached at any of these numbers** option under the Send me a text message AND Call my phone options.



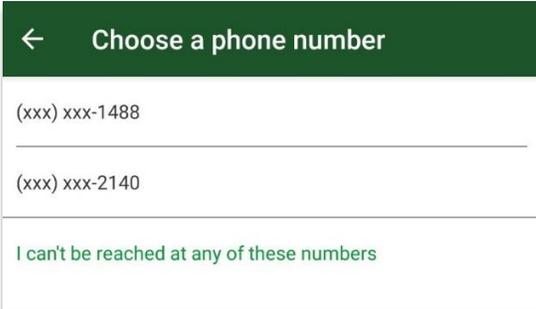
**Identity verification**

As a security precaution, we need to verify your identity before you can proceed. This quick process helps us keep your account safe.

Please choose one of the following options.

**Send me a text message**  
We will send you a text message with a confirmation code. >

**Call my phone**  
We will call you and provide a confirmation code. >



**Choose a phone number**

(xxx) xxx-1488

(xxx) xxx-2140

**I can't be reached at any of these numbers**

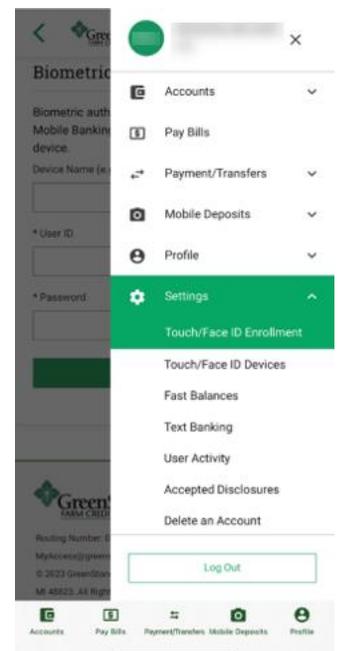
## Challenge Question



## Forgot password

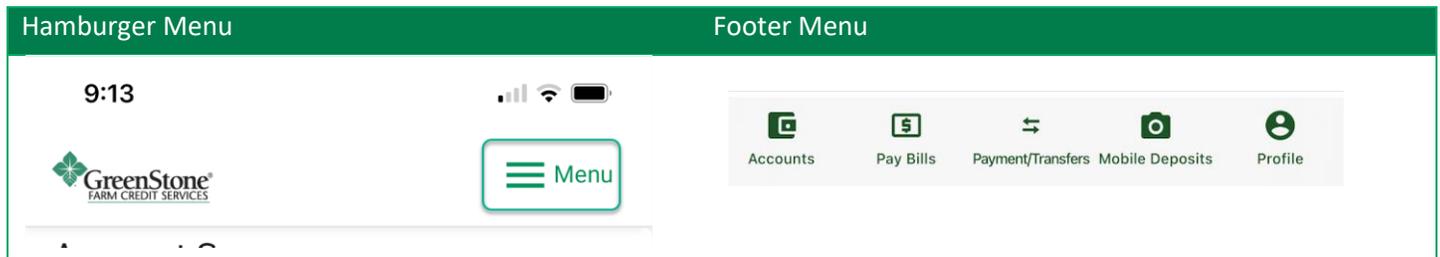
When a customer has their password reset either by support or by using the Forgot Password method, all the devices the user has set up for biometrics need to be [re-enrolled](#).

Customers must log into the portal first in order to set up their new password. Users cannot log into the app until the password has been reset through the portal. Once a new password has been set, the user can log into the app using the new password and navigate to **Settings > Touch/Face ID Enrollment** page to set up their device again.



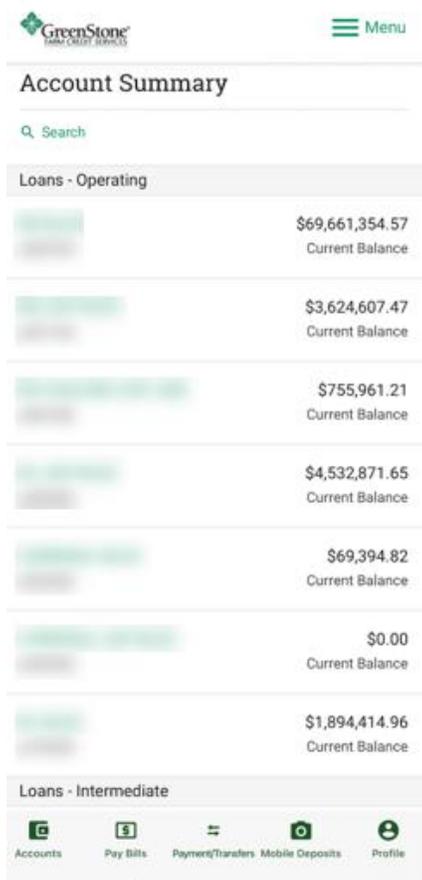
# Navigation

There are two main navigation areas, the hamburger menu which is found in the upper right-hand corner, or the footer menu at the bottom of the screen. Note that some features are not available on mobile such as Pay Now.



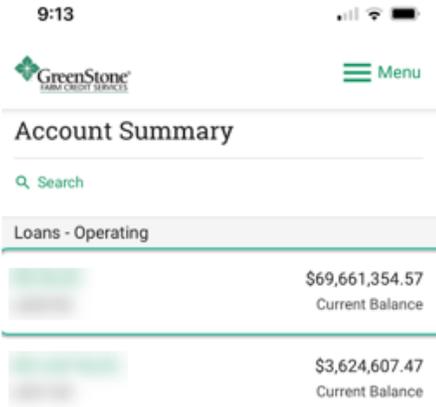
## Landing Page – Account Summary

After logging in successfully, the accounts page is displayed.



# Account Details

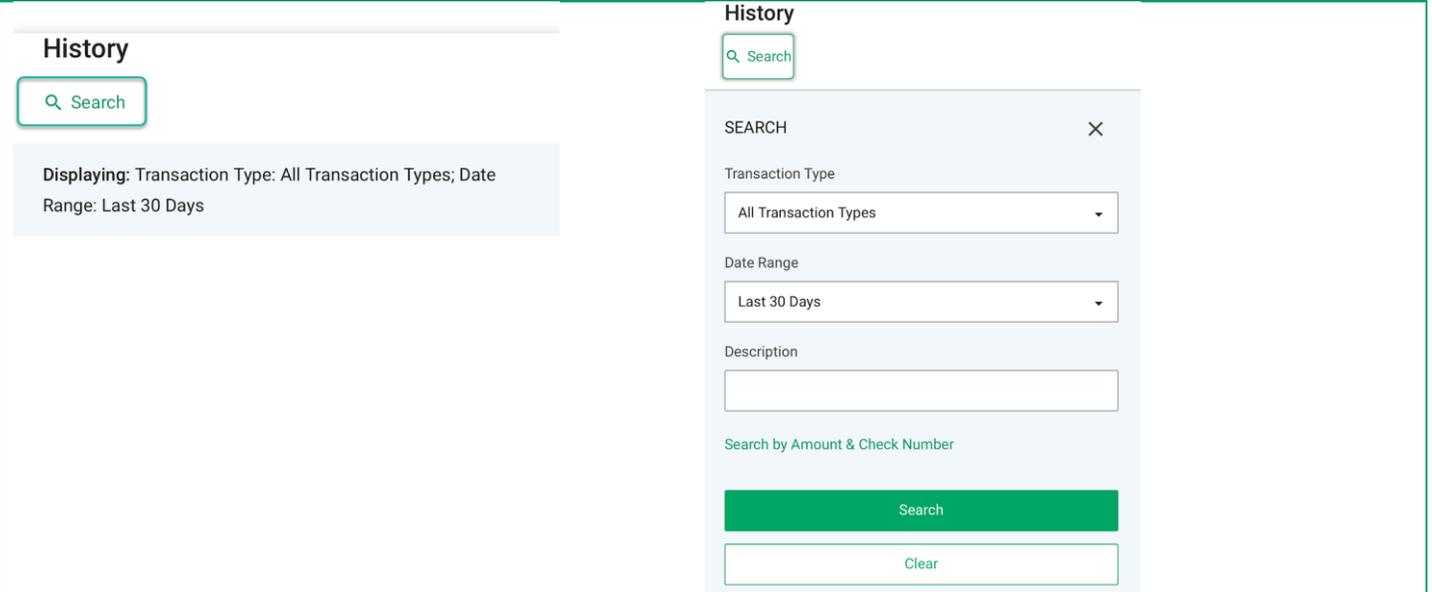
The details of an account are found by selecting the account from the summary.



By default, the last 30 days of transactions are shown.

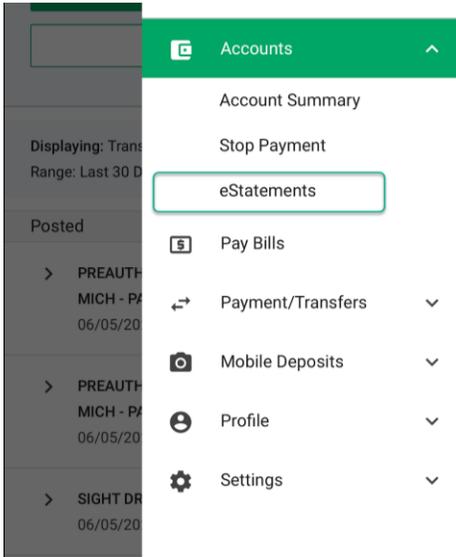


Selecting Search Options allows customers to search descriptions, date range and transaction type.

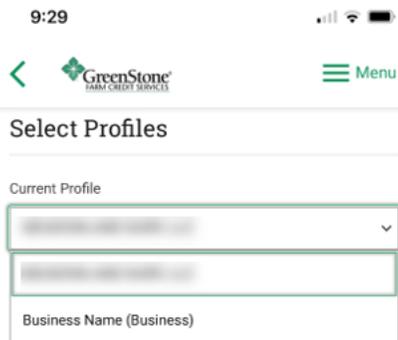


## eStatements

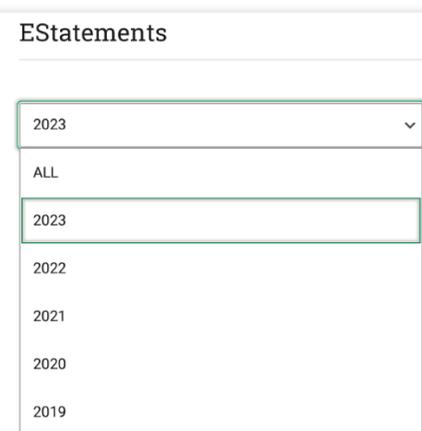
Customers access eStatements for their own or any linked accounts they have set up by going to the eStatements option under the Accounts header within the hamburger menu.



If the customer has any linked accounts, a Select Profiles section is displayed.



A dropdown containing a list of years allows the customer to view previous statements.



Clicking "Click Here" under view document opens a preview of the document that can be downloaded.

← eStatement 

 **GreenStone**  
MONEY CENTER SERVICES  
2815 WEST ROAD  
FAIR LANSING MI 48023  
(800) 948-8821  
www.greenstone.com

**Notice Date** May 19, 2023

**IMPORTANT RATE NOTICE INFORMATION ENCLOSED**  
MOGSEEDLI LOYAKA, K.F.M.  
1486 NACQURIF ZAM  
KUTIB PECA VO KETORIS

**CUSTOMER NUMBER** 3914520

**INTEREST RATE CHANGE INFORMATION EFFECTIVE -- JUNE 1, 2023**

ACCOUNT NUMBER	ACCOUNT PURPOSE	AP CAP RELOC.	
120789109			
<b>CURRENT INTEREST RATE</b>	<b>8.7500%</b>	<b>NEW INTEREST RATE</b>	<b>7.8800%</b>

**RATE NOTICE EXPLANATION**

The new rate is determined by adding a margin of 1.2500-% to the current index of 6.2500%.

The index used to compute the new rate is the prime rate reported on the tenth day of the month preceding the interest rate change date by the Wall Street Journal in its daily listing of money rates, defined therein as "the base rate on corporate loans posted by at least 70 percent of the 10 largest U. S. banks."

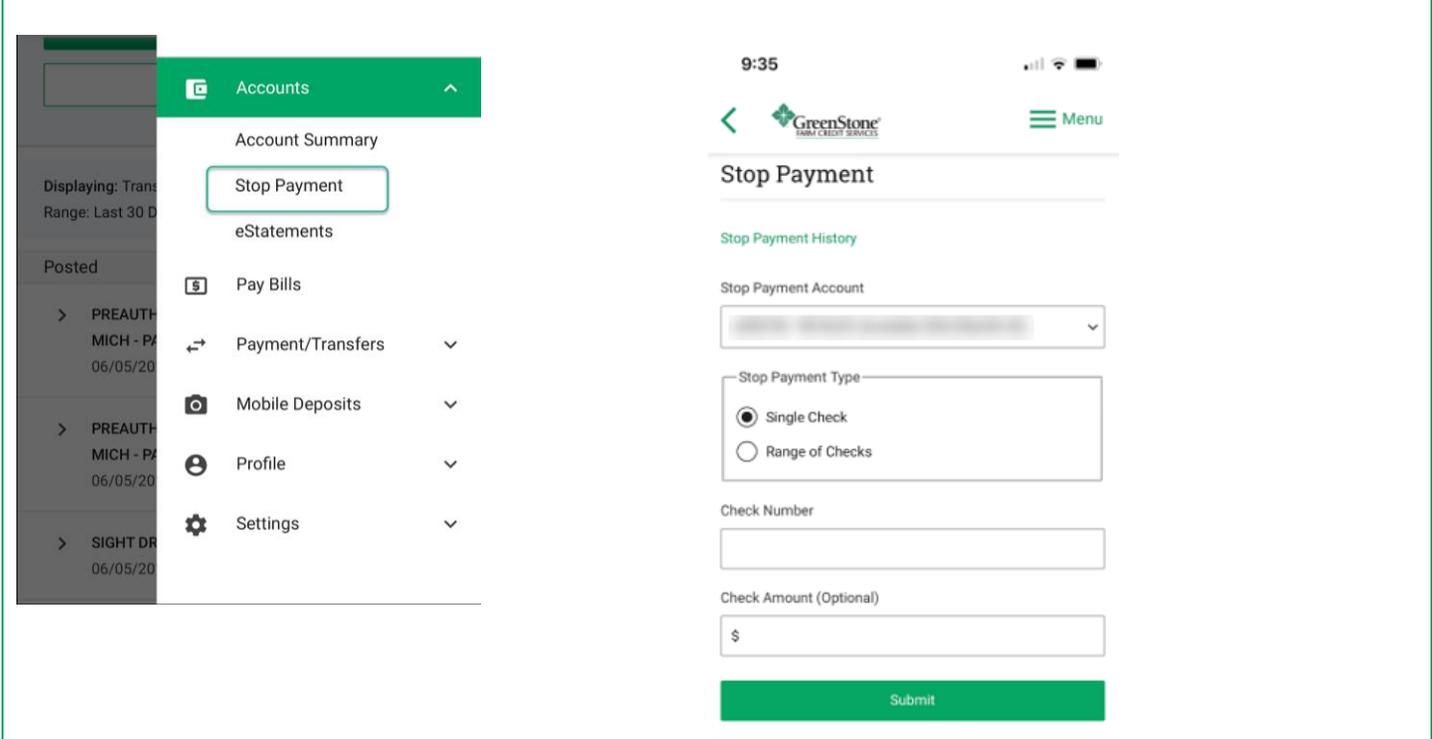
If the loan has an adjustable or variable interest rate, you will be notified in writing of any change in an interest rate tied to an external index not later than 45 days after the effective date of the change, or if the interest rate is not tied to an external index, not later than 10 days after the effective date of the change, or if the loan is subject to the Truth in Lending Act, not later than the notice period required under that Act.

945-075-09-000495 23

# Stop Payments

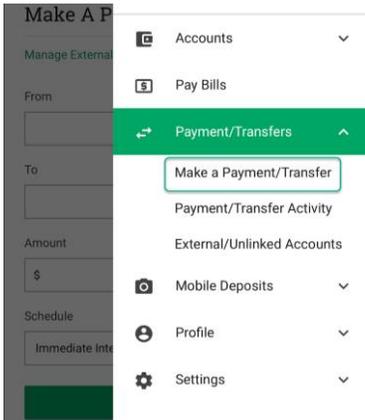
Customers can request stop payment on a check or range of check numbers by navigating to Stop Payments under the Accounts menu.

1. Navigate to *Accounts > Stop Payments*
2. *Account, Single or Range of checks, and the Check Number(s)* are required. Optionally, an *Amount* can be entered.

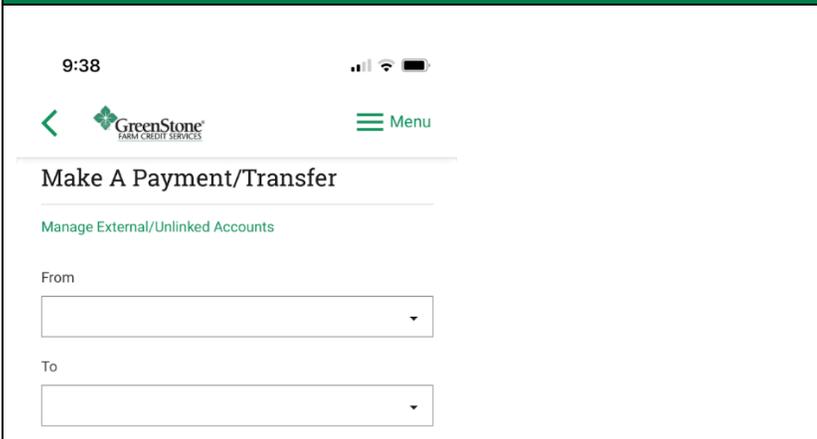


# Transfers

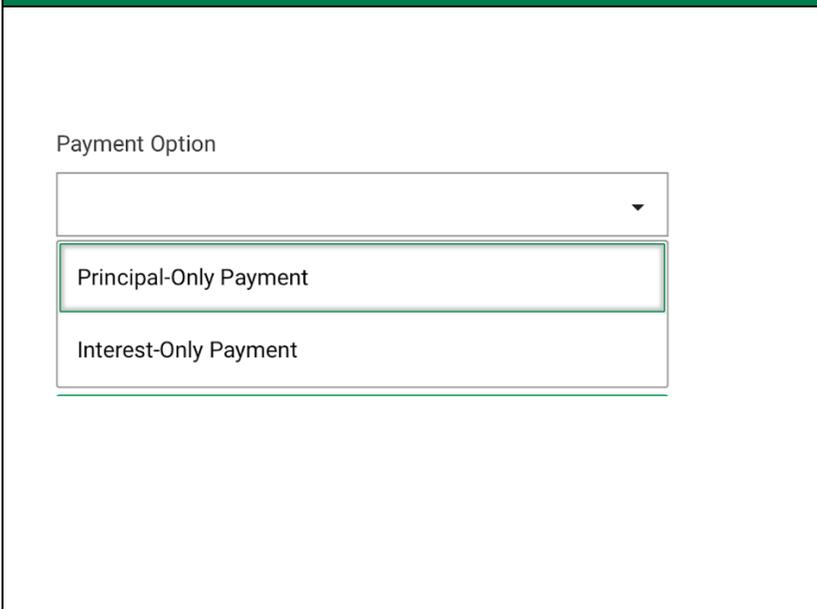
Online Banking allows customers to initiate internal and external transfers. The cut off time for transfers is 4:00 PM CST.



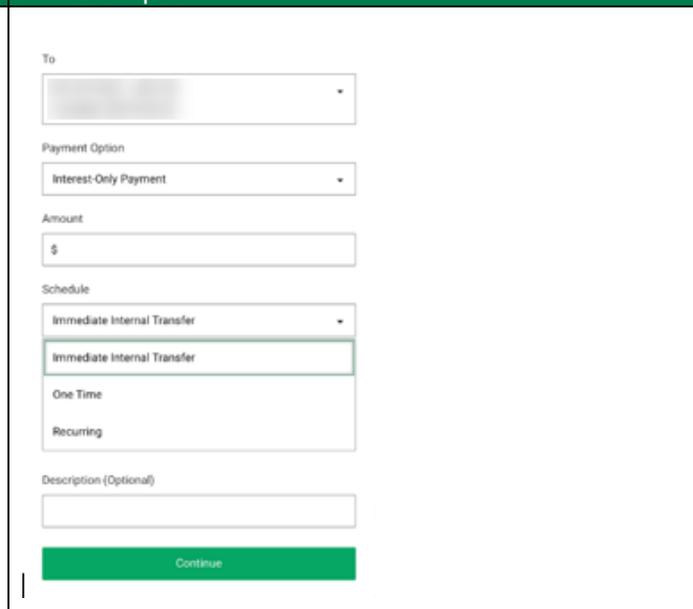
1. Select an account to transfer from and an account to transfer to.



2. Select the type of payment/amount



4. Verify the information is correct, select a Scheduling Option, and optionally enter a description



4a. Scheduling Options

Amount

\$

Schedule

Immediate Internal Transfer

Immediate Internal Transfer

One Time

Recurring

4b. If *Future-Dated (One Time)* is selected, a *Payment/transfer date* appears.

9:44



\$

Schedule

One Time

Payment/Transfer Date

06/15/2023



June 2023

Today

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

5. Customers can check to receive an alert when the transfer is executed. Click continue to review the transfer/payment before clicking transfer to complete the payment/transfer.

Description (Optional)

Send me an email when this transfer is completed

Continue

The user will receive a confirmation notification.

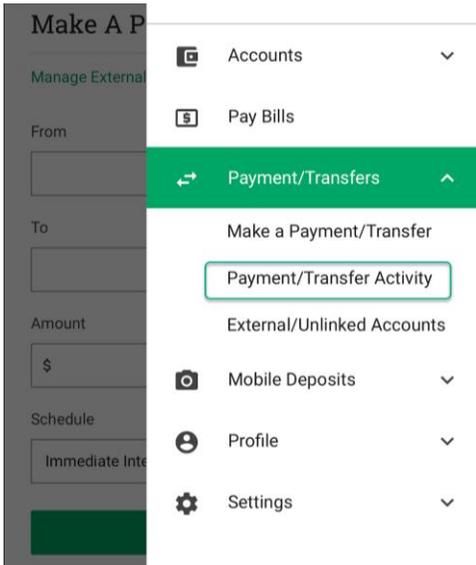
9:48



✔ Your transfer has been successfully scheduled. ✕

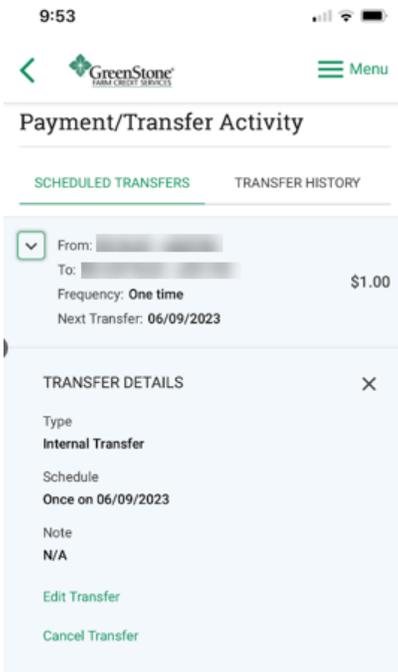
## Payment/transfer Activity

Customers can view scheduled or past transfers by going to the **Payment/Transfer Activity** section underneath **Payment/Transfers**.



A menu is displayed, allowing customers to view schedule transfers and transfer history.

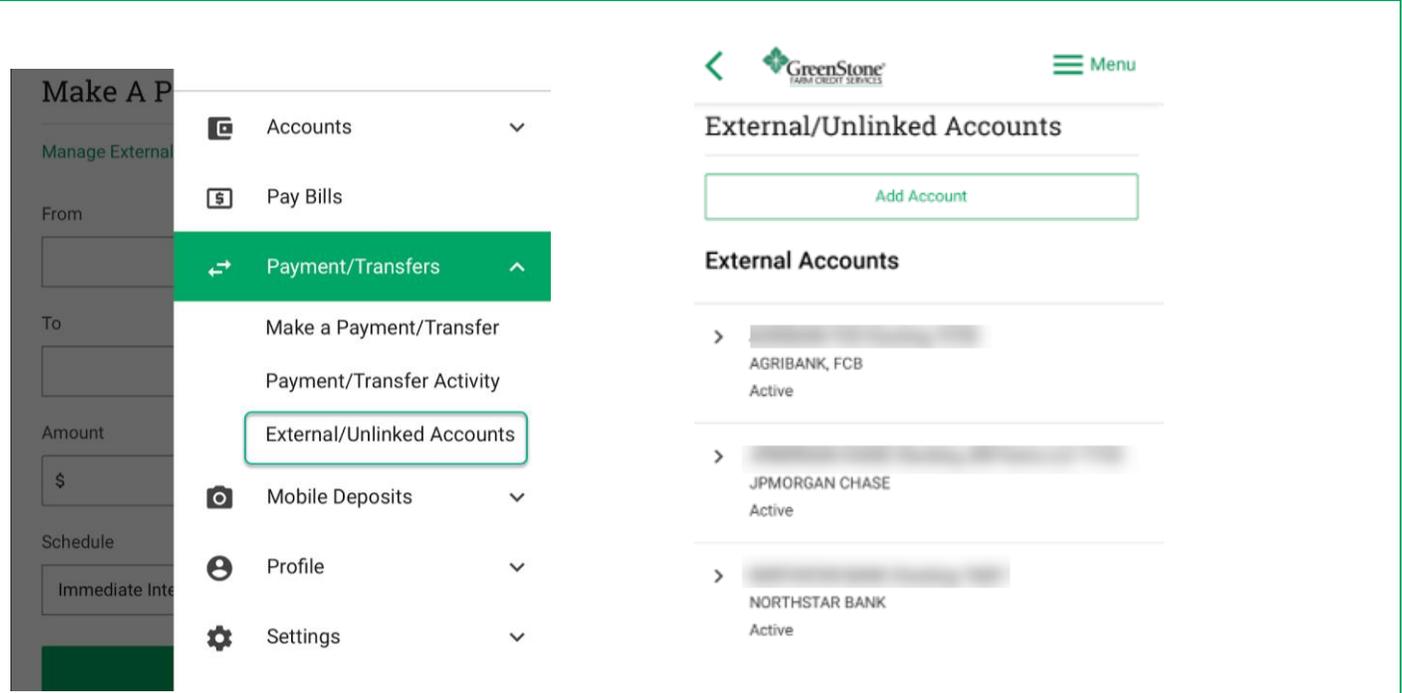
Selecting a schedule transfer brings up the edit screen where customers can change the amount, or scheduling option, if it is set to future-dated only, or select cancel to cancel the transfer.



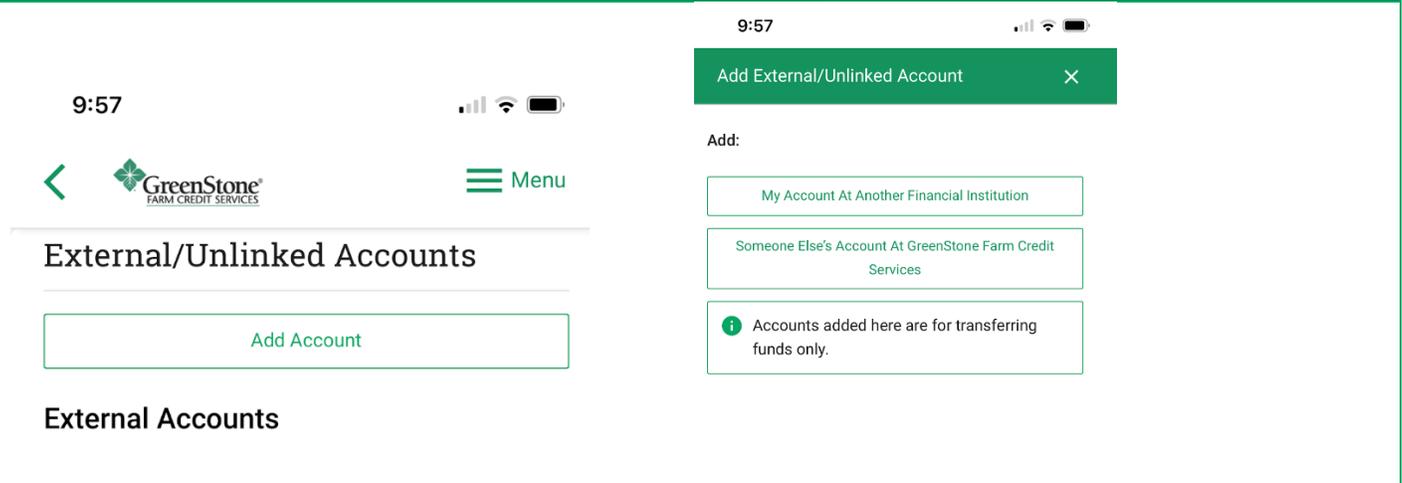
# External/Unlinked Accounts

External accounts can be added, verified, and deleted from the mobile app the same as desktop.

1. Navigate to *Payment/Transfers > External/unlinked Accounts*
2. If any external accounts have been set up, they appear below.



3. To add a new account, select Add External Account
4. Select whether the account is a financial institution or another GreenStone customer. Enter in the Routing Number of the institution and select Verify



Add External Account ✕

information, two small deposits will be made to your external account. To complete the setup of your external account, return to the External/Unlinked Accounts page and verify the amount of the deposits.

Account Nickname ⓘ

Routing Number ⓘ

Financial Institution  
**No valid routing number entered.**

Account Type

Account Number ⓘ

Confirm Account Number

Back Add Account

Accounts Pay Bills Payment/Transfers Mobile Deposits Profile

5. Enter in the *Account Number*, a *Nickname*, and select whether it is a *Checking* or *Savings* account.

Account Nickname ⓘ

Routing Number ⓘ

Financial Institution  
**No valid routing number entered.**

Account Type

Account Number ⓘ

Confirm Account Number

Back Add Account

Accounts Pay Bills Payment/Transfers Mobile Deposits Profile

## Verifying

Before an external account can be used for transfers, it must be verified. Accounts that have not been verified, are shown as pending.

### External Accounts

[Add External Account](#)

**Personal Checking – x9065**  
Institution Name: BANK OF AMERICA N.A.  
Status: Active >

**Farm Account – x6789**  
Institution Name: JPMORGAN CHASE  
Status: Pending >

1. Select the account that is in Pending status.

2. Three options display; *Delete*, *Edit*, and *Verify*

### External Accounts

[Add External Account](#)

**Farm Account – x6789**  
Institution Name: JPMORGAN CHASE  
Status: Pending >

### External Account Details

**Nickname** Farm Account  
**Type** Checking  
**Institution Name** JPMORGAN CHASE  
**Account Number** x6789  
**Routing Number** 122100024  
**Status** Pending

[Delete](#)

[Edit](#)

[Verify](#)

3. Select Verify and enter in the two deposits located in the external account

4. A success message displays.

### Verify Trial Deposits

We have made two small deposits of less than \$1 into your account at the other financial institution. These transfers may take up to 3 days to show in your account. Please check your statement or contact your other financial institution to find the amount of these deposits and enter them below. You may enter them in any order. This step must be completed before you can take full advantage of the external transfer process.

\* Deposit Amount 1

\$0.

\* Deposit Amount 2

\$0.

Cancel

Next

✓ Successfully verified account.

### External Account Details

**Nickname** Farm Account

**Type** Checking

**Institution Name** JPMORGAN CHASE

**Account Number** x6789

**Routing Number** 122100024

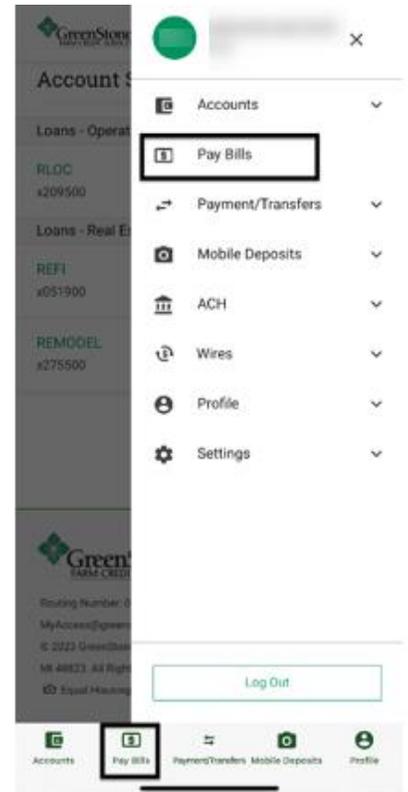
**Status** Active

Delete

Edit

# Bill Pay

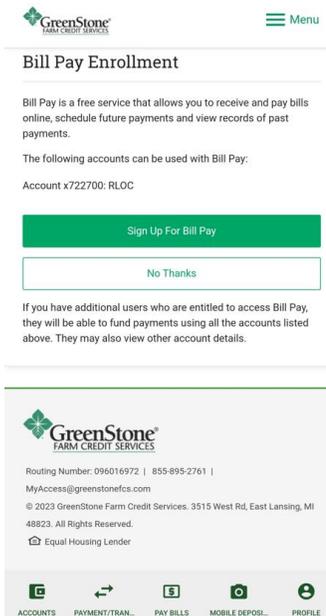
Bill Pay is a single sign on through online banking. Bill Pay is accessed by selecting Pay Bills from the navigation menu at the bottom of the screen or under the Accounts menu



## Enrollment

When accessing Bill Pay for the first time, the user will be shown a screen listing all available operating loans eligible for Bill Pay.

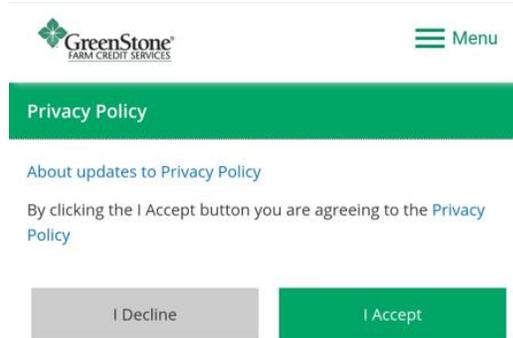
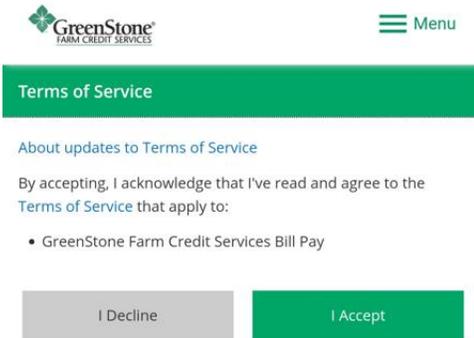
### 1. Click on **Sign Up For Bill Pay**



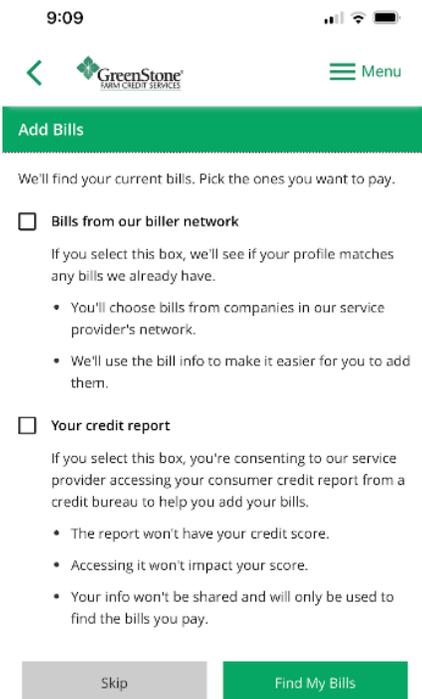
*Note: clicking on No Thanks redirects back to the Account Summary screen.*

2. Review the Terms of Services click the **checkbox** next to I Accept and click **Continue**.

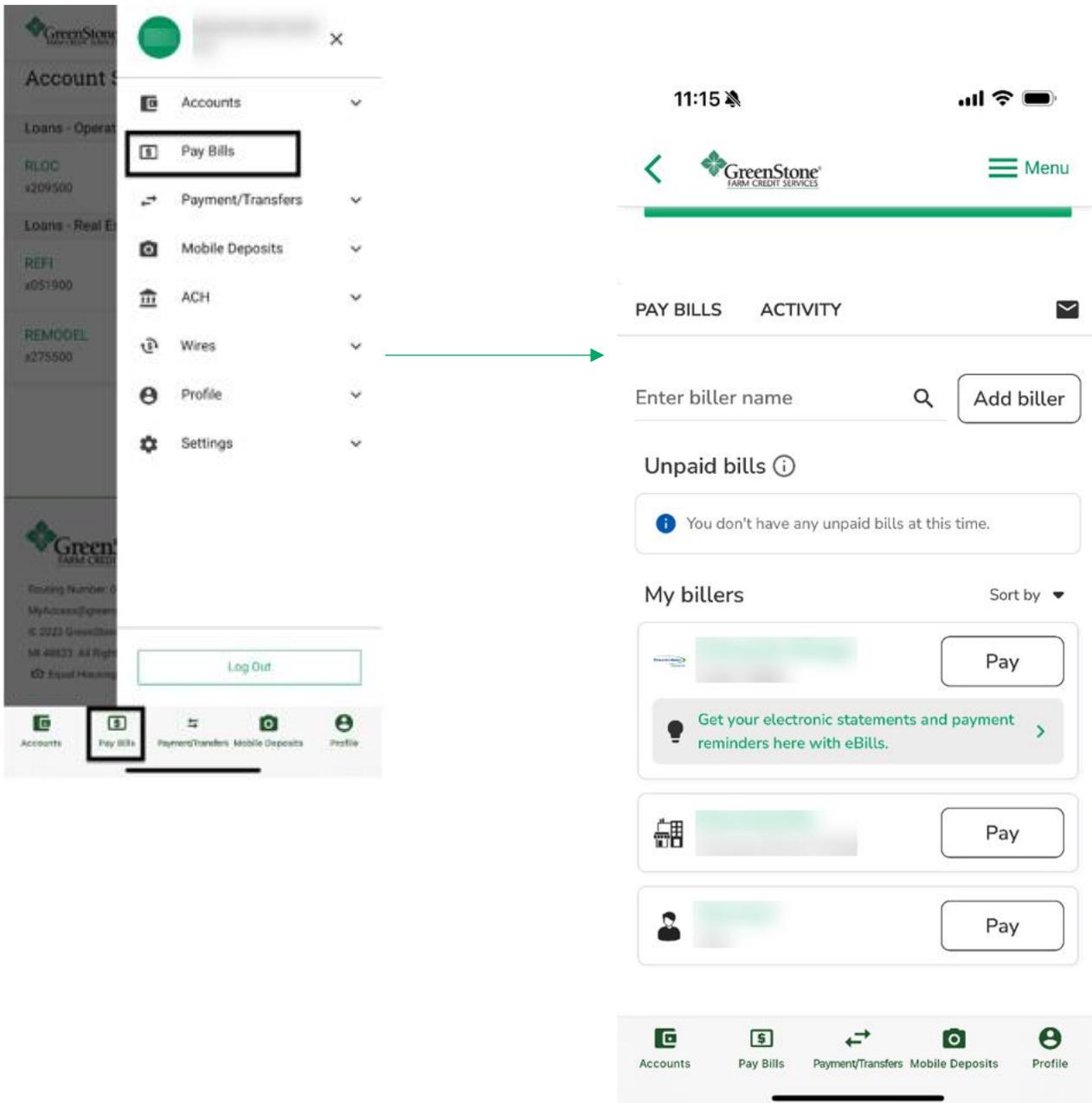
3. Review the Privacy Policy, click the **checkbox** next to I Accept and click **Continue**.



4. Two options are shown to add existing bills into Bill Pay; *Bills from our biller network* or *Your credit report*. *Note: consenting to the credit report access will not affect the users credit score.*



The main landing page of Bill Pay is accessed by selecting Pay Bills from the navigation menu at the bottom of the screen or under the Accounts menu.



## Add new biller

To add a new bill select **Add biller**. There are preloaded companies that only require the user to provide their account information to finish the set up. If a company is not listed in the list of categories, additional information such as an address is required before adding the company as a payee.

1. Select Add biller and type in the name of the company or person. Click **Add**.
2. Select **Company** or **Person** and enter the account information, then click **Add**.
3. The user will see a success message and the company will be added to the user's Payment Center.

11:17

DICK E TRACY

Select

PAY BILLS ACTIVITY

Enter biller name

John smith

Add biller

Match not found. You can add this biller to your list.

+ John smith  
Add biller

My billers

Sort by

11:17

ADD BILLER

COMPANY PERSON

Account information

Biller first and last name  
John smith

Nickname (optional)

Mailing address

Biller address 1

Address 2 (optional)

City

State

ZIP code (5-digit) ZIP+4 (optional)

Accounts Pay Bills Payment/Transfers Mobile Deposits Profile

## Make a Payment

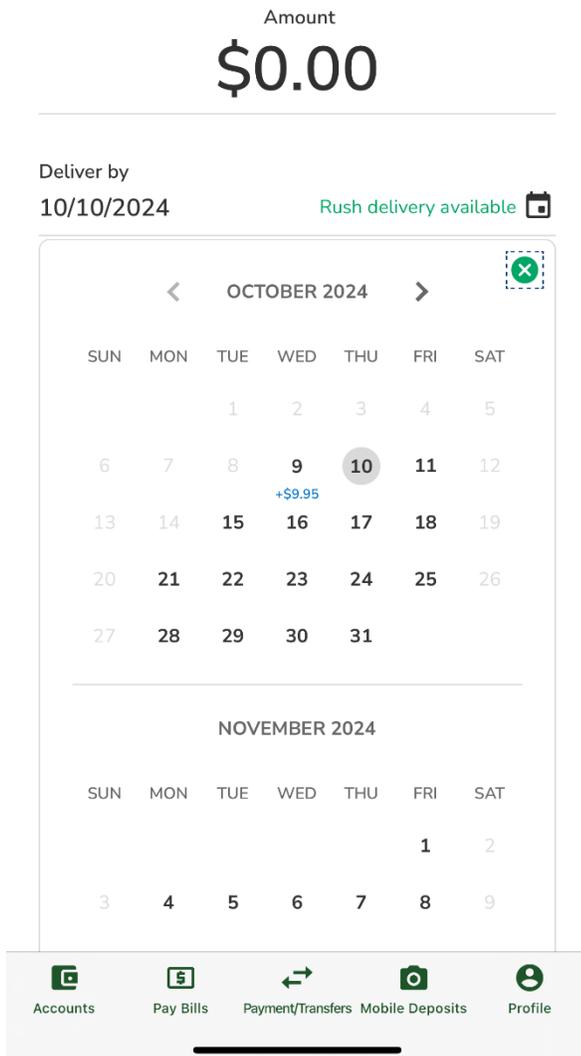
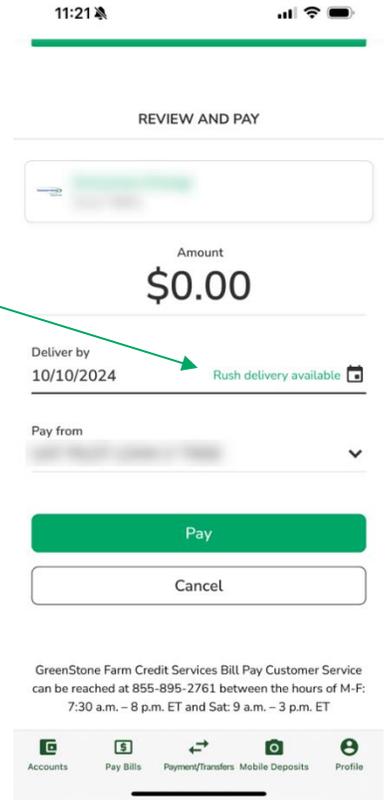
Once a user has billers added they can select a biller to process a payment

1. Select a biller from the list. This will take the user to the Review and Pay screen.
2. Enter in the required information and select **Pay**.

## Rush Delivery

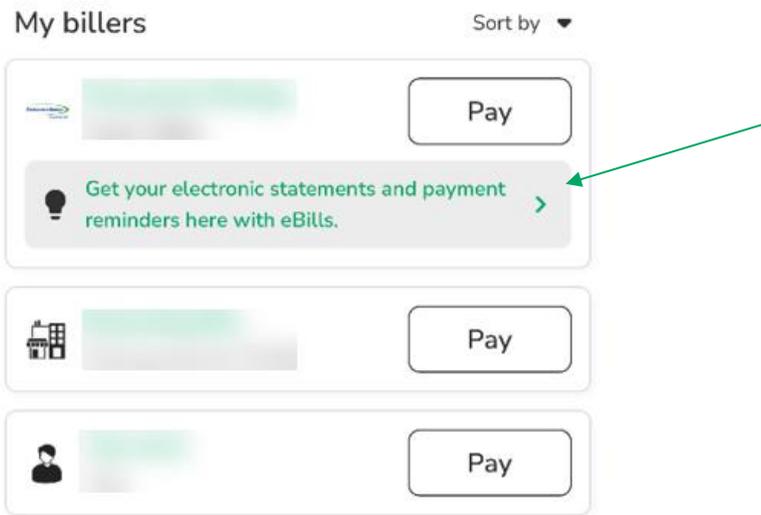
Rush Delivery allows users to send payment outside of the normal schedule. This feature isn't available for all billers.

If the payee allows for Rush Delivery, a **Rush Delivery** link displays next to the delivery date text field.



## eBills

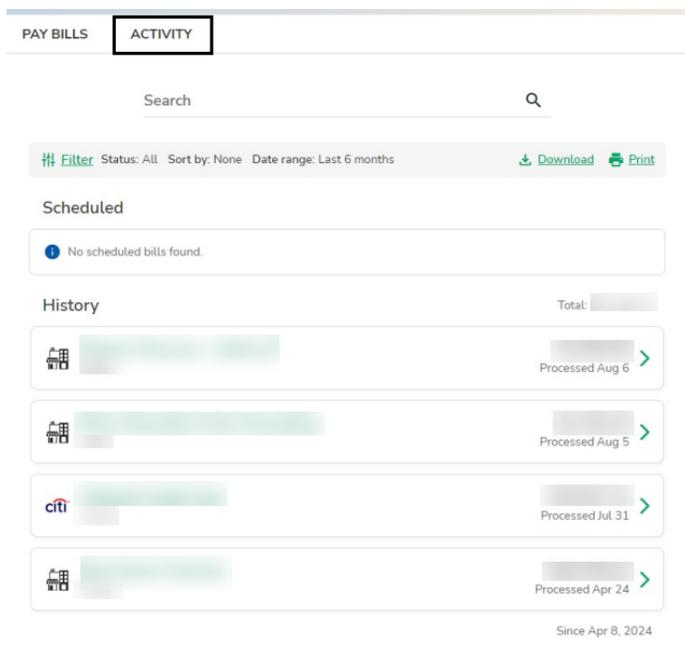
If a biller offers eBills, users can sign up and receive their bill directly in Bill Pay. Billers that offer eBills have a banner below their name to select and request eBills.



## Activity Section

The Activity section shows scheduled and past payment activities. Clicking on the payment amount, opens the Payment Details window showing the pay from account and when the amount is going to be withdrawn.

If a payment is in the scheduled section, it allows the payment to be cancelled.



# History

The history section shows any payments that have been made or cancelled in the last 45 days.

Clicking on the link in each line item shows the details of that payment.

The screenshot displays the 'ACTIVITY' tab of a 'PAY BILLS' system. At the top, there are tabs for 'PAY BILLS' and 'ACTIVITY'. Below the tabs is a search bar and a filter bar with options for 'Filter', 'Status: All', 'Sort by: None', and 'Date range: Last 6 months'. There are also 'Download' and 'Print' icons. The 'Scheduled' section shows 'No scheduled bills found.' The 'History' section lists four payment items, each with a logo, a blurred amount, and a 'Processed' date with a right-pointing arrow. The dates are 'Aug 6', 'Aug 5', 'Jul 31', and 'Apr 24'. At the bottom right of the history section, it says 'Total: [blurred]' and 'Since Apr 8, 2024'.

Logo	Amount	Status	Date
[blurred]	[blurred]	Processed	Aug 6
[blurred]	[blurred]	Processed	Aug 5
citi	[blurred]	Processed	Jul 31
[blurred]	[blurred]	Processed	Apr 24

# ACH

---

ACH origination enables business users to originate a wide range of ACH payments and collection types, including vendor payments, and direct deposit of payroll. The ACH functionality is divided into two approaches when sending out payments.

- **Pass-Thru** provides an upload feature for those customers who have another software that provides them a NACHA file. The customer imports the file to be processed on a specified date.
- Architect has the built in components to create **ACH batches** without existing NACHA files: Participants and Templates

## Participants

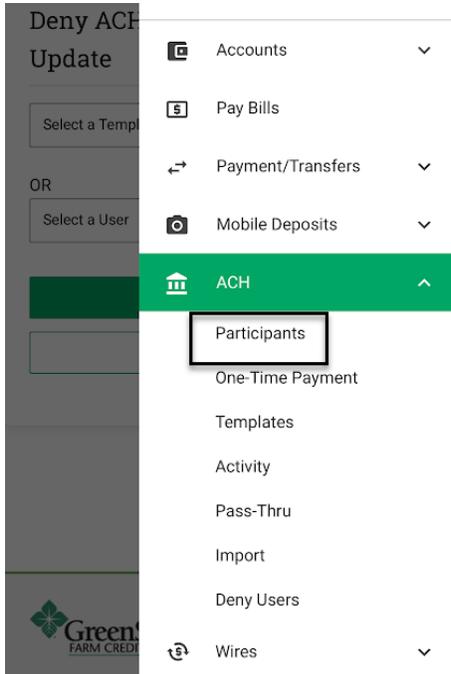
Authorized business users are able to setup ACH participants, which are external entities such as individuals, corporations, or government. The money may be transferred to or collected from the participants. Setting up participants involves adding key information about participants such as their name, financial institution information, unique identifier, bank account number, account type, and discretionary data. The participants may be grouped together based on type such as hourly employee, salaried employee, vendor, government etc. While keying in the participant financial institution information, the system auto completes the name of the financial institution and routing number based on the first few typed characters. The user may then select a financial institution from the pre-populated list to avoid a typing error.

*There are three ways to create participants:*

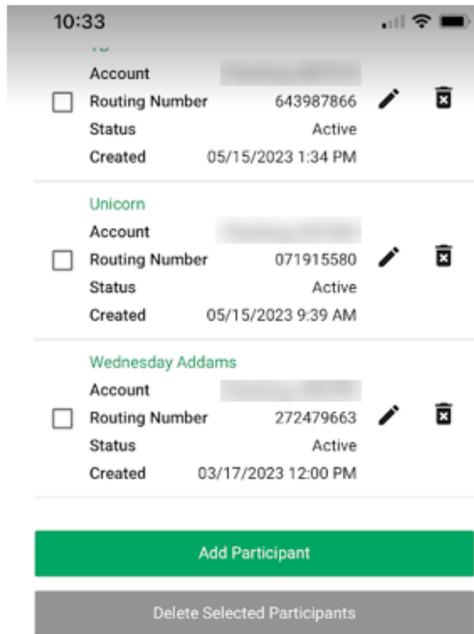
- One by one (seen in the steps below)
- Upload a .csv file at the time creating a template
- From a NACHA import file.

## Create Participants Individually

1. Click ACH, and select Participants.



2. Click Add Participant.



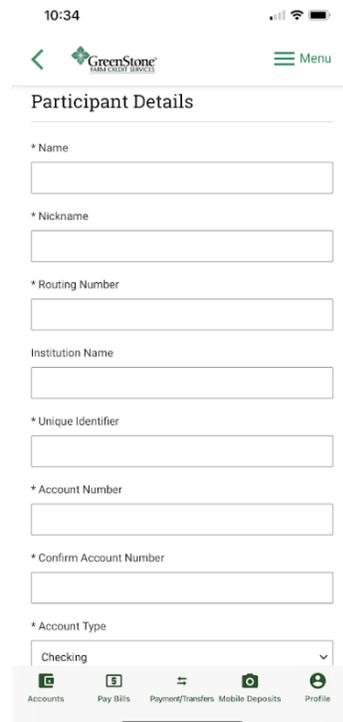
3. Fill in the information for the participant:

- Name - *required*
- Nickname - *required*
- Routing Number - *required*

After inputting the routing number, the bank name displays. If the name is clicked, the bank name is populated in the Institution Name automatically.



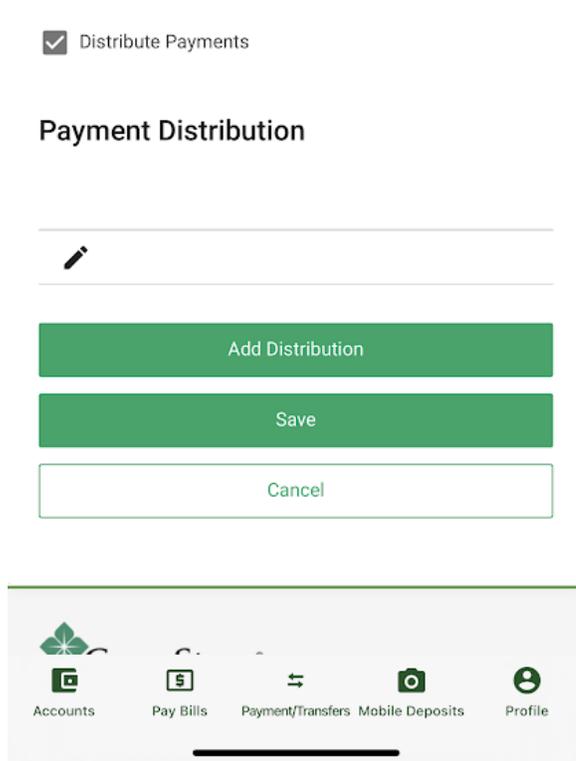
- Institution Name - Bank name
- Unique Identifier (*example: 01*) - *Required*
- Account Number - *required*
- Confirm Account Number - *required*
- Account Type – Checking, Savings, or Loan - *required*



- Status – Active or Hold - *required*
- Participant Group – a way to categorize participants for searching later. [See Searching by Group](#)
- Discretionary Data
- Distribute Payments – if the participant has multiple accounts for the payment to go to.

4. The user has the ability to mark the check box next to distribute Payments.

Once the box is checked additional menu options are shown.



5. The user can click the Add Distribution button to enter the distribution/split details.

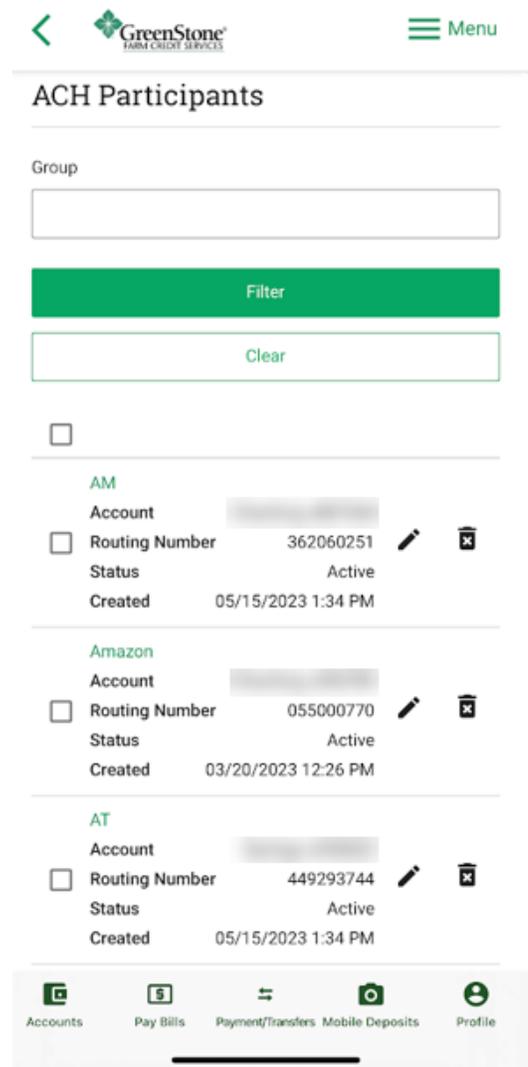
6. Enter the account information, then enters a fixed payment amount. The user has the option to select the **Share Remaining** check box. If selected, the Share Remaining check box indicates that once distributions are complete, any remaining funds from the payment amount can be split with other accounts.

7. The user may prioritize the accounts by clicking the arrows in the **Priority** column to move a distribution up or down in the priority list. Users may view, edit, or delete distributions. There is no limit to the number of distributions a user can have.
8. Once the users has added the distributions have been added, Click **Save**.

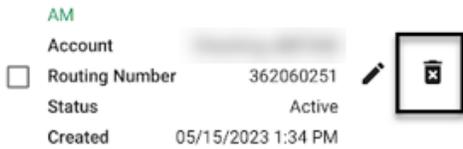
## Editing / Deleting Participants

Users can edit or delete participants by navigating to **ACH** and selecting **Participants**.

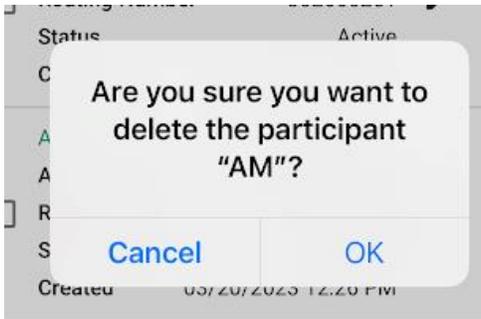
To edit the participant, click the **pencil** in line with the participant. The customer may edit all information.



To delete the participant, click the trash in line with the participant.



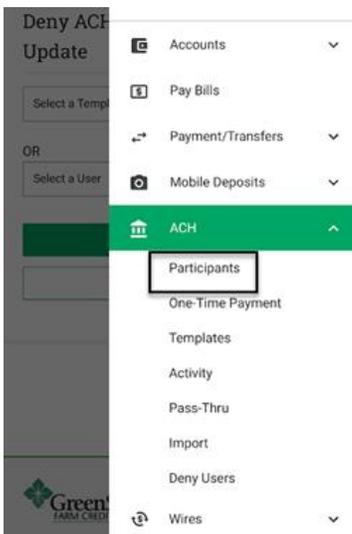
A prompt will appear asking the user if they are sure they want to delete the Participant. The clicks **OK** to continue.



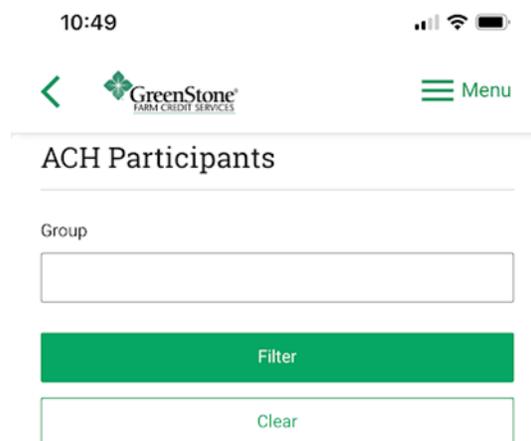
## Searching by Group for Participants

A group search filter field is available to search for ACH participant records.

- Easily search for ACH participants using the group field
- Filters the participant list when the group field contains the search criteria
- Simplifies template creation for a large number of ACH participants
- Simplifies finding groups of participants to edit
- Available for New Template creation as well as the ACH Participant screen



1. Navigate to ACH, and select **Participants**.
2. Type in the name of the group and click **Filter**. Only the participants with the group name entered then display.



## Templates

Templates are ACH batches that allow users to send one time or recurring payments to external accounts. Templates may be saved and ran as needed, or set up to be recurring. Templates are often used for payroll or monthly expenses. When creating a template for the first time, participants may be uploaded at the time of creating the template.

## Adding a Template

The user can add a template by navigating to ACH and selecting Templates.

Click **Add Template**.

Fill in the required fields and click **Save**.

The screenshot displays the GreenStone Farm Credit Services interface. On the left is a navigation menu with 'ACH' selected, and 'Templates' highlighted. The main content area shows the 'ACH Templates' page with a 'Show Search Options' checkbox and a 'Test' section containing fields for 'Credit Amount' (\$0.00), 'Debit Amount' (\$0.00), and 'Effective' date (08/29/2024). A copy icon is highlighted next to the effective date. Below these fields are 'Add Template' and 'Delete Selected Templates' buttons. At the bottom, a navigation bar includes 'ACCOUNTS', 'PAYMENT/TRAN...', 'MOBILE DEPOSIT...', and 'PROFILE'. On the right, the 'Template Details' form is visible, featuring fields for 'Template Name', 'Transaction Type', 'Company Discretionary Data', 'Is Restricted', 'Company Entry Description', and 'Company'. Buttons for 'Deny Specific Users', 'Save', and 'Initiate Prenotes' are also present.

Users can also copy existing templates by clicking the icon noted above.

## Adding Participants

While creating a template, the user may add an existing participant, create a new participant, or upload a .csv which automatically creates the participants with the information needed for the template.

### *Adding from Existing Participants*

1. If a participant(s) being added has Split Payments, select the checkbox.
2. Click **Add Participants** and.

### Batch Entries

There are no batch entries.

Active Total \$0.00 Hold Total \$0.00 Prenotes 0

### Import CSV File

Choose File

No file chosen

Import

Save

Add Participants

Initiate Prenotes

Save And Close

Cancel



3. Select from the participant list which participants should be added Click **Add Selected Participants**.
4. Check the boxes for **Hold** or **Prenote** if applicable and enter the amount for each participant.

<i>Split Payments</i>	Enables businesses to create multiple 'Distributions' under a participant. The amounts may be fixed or variable and may be assigned to each distribution without creating a second participant. The priority can be set for the primary participant and associated distribution participants.
<i>Prenote</i>	Sends 0 dollar transactions to bank account to verify it is legitimate before sending actual money
<i>Hold</i>	If account is marked as hold, participants with the status of hold is not included in the batch and money is not sent.

3:47



### ACH Participants



The participant "JS" has been created.

Group

Filter

Clear



JS

Account                      Checking x555555

Routing Number              555555555

Status                              Active

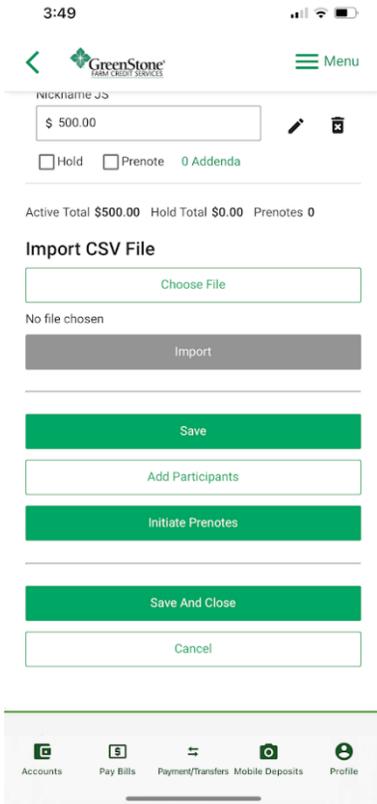
Created                              07/17/2023 2:47 PM

Add Selected Participants

New Participant

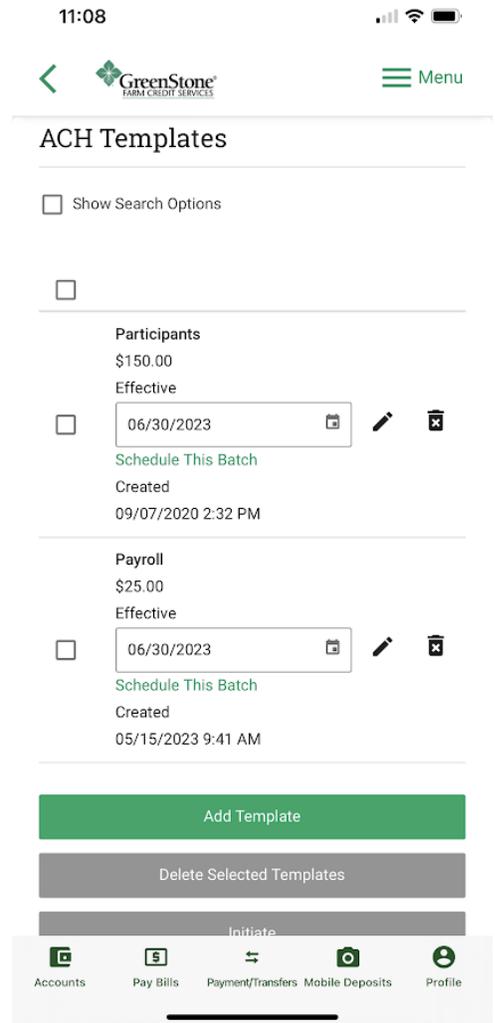
Cancel

5. Click **Save and Close** when all entries are complete.



## Editing a Template

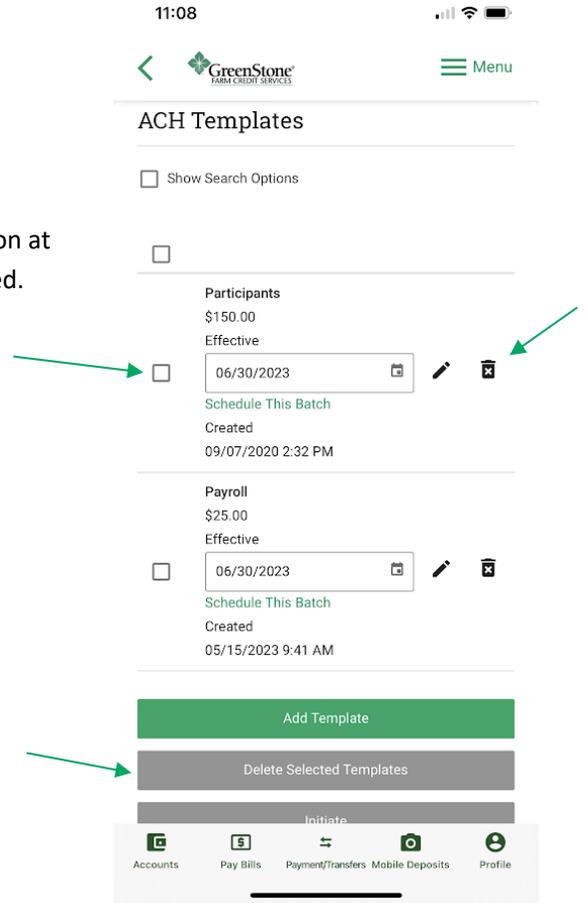
Templates may be edited using the pencil icon in line with the template name.



## Deleting A Template

Templates may be deleted from two different buttons on this page.

- The pencil icon on the right side of the row.
- Select the check box of the template on the left then use the button at the bottom of the page and click **OK** to confirm it should be deleted.



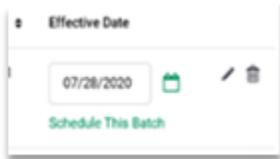
## Scheduling a Batch Payment with a Template

To schedule a batch payment with a template. Navigate to **ACH**, and in the sub menu click **Templates**.

1. Check the box of the template to initiate.
2. Input the **Effective Date**.
3. Click **Initiate**.

**Initiate Same Day** may be used if it is before the cut off for the day and if the customer has the

**permissions. In this case, Effective Date is not applicable. The cut off is 12:30 CST.**



Recurring Batches

Batches may be scheduled as recurring as well as one time.

1. From the grid of templates, click **Schedule This Batch**.
2. The window opens to input the recurrence

Set the **Start Date, Frequency** and the length of time the recurring continues.

11:35

Recurring Batch Schedule

Batch

Payroll

Amount  
\$25.00

Company

Transaction Type  
PPD Credit - Consumer Credit

Fund From

\* Start Date  
06/30/2023

\* Frequency  
Monthly

No End Date

End By  
MM/DD/YYYY

Number of Transfers

\* Frequency

Monthly

Weekly

Biweekly

Semimonthly

Monthly

Bimonthly

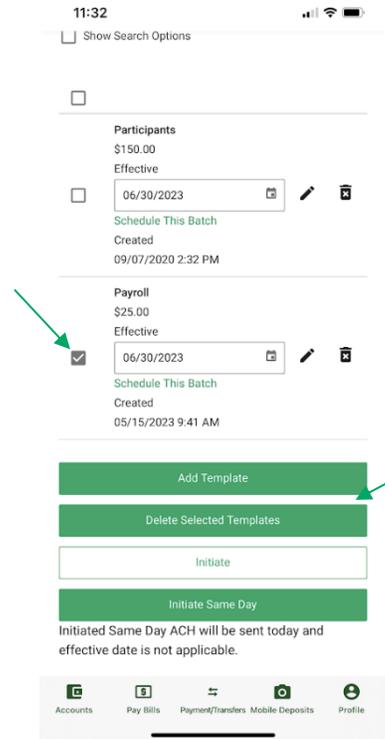
Quarterly

Semiannually

Annually

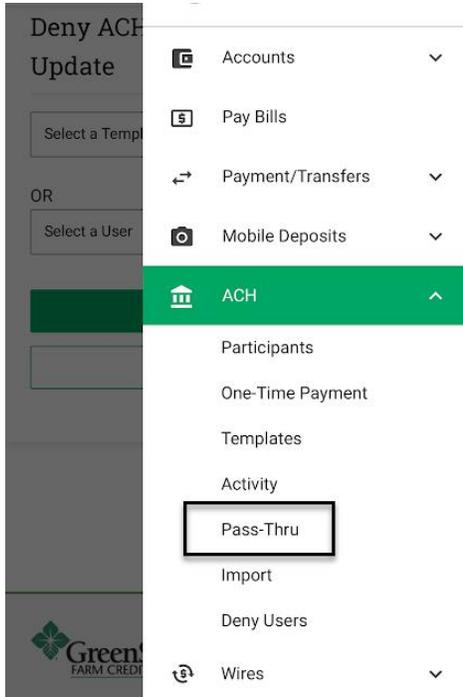
Weekly (limit to 4 per month, skip the FIRST transfer in

Batches that are scheduled show on the ACH Activity page.



## Pass-Thru

ACH Pass-Thru is used when the user has software that generates the NACHA files for them. The customer simply needs to process the payments by using online banking as the sender in order to pull the money from their loans and make the appropriate payments.

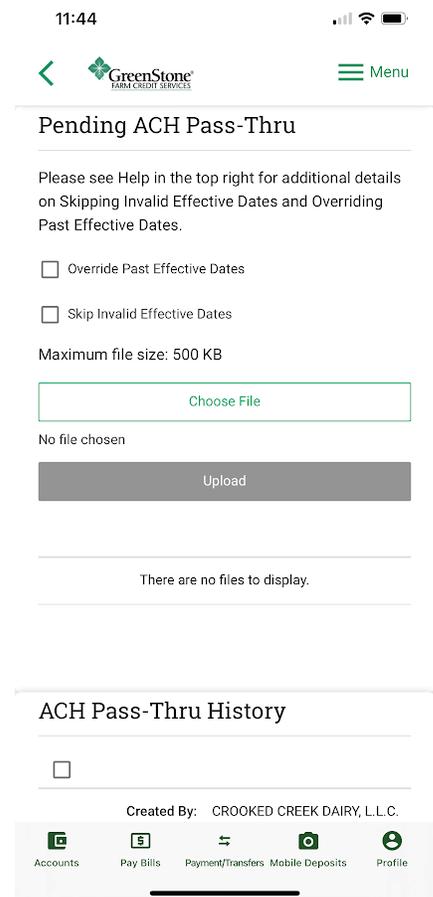


Navigate to ACH, and choose **Pass Thru**.

**Check the boxes if applicable for Override Past Effective Dates and Skip Invalid Effective Dates.**

when choosing to override past effective dates, the user must input the date for the transactions to be effective.

**Note: This date cannot be futued dated by more than 2 days.**



Click **Choose file...** and choose the NACHA file.

Click **Upload**.

A success message displays when there are not any issues with the file being imported.

## Viewing the detail of the pass thru

Navigate to **ACH** and choose **Pass Thru**.

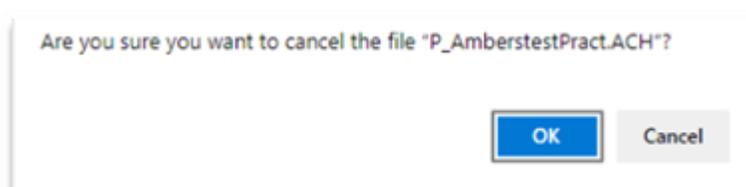
Scroll down past the success message to see the pending NACHA file(s)

Click the **File Name** to see the details of the Pass Thru

## Deleting a Future Dated Pass Thru

If a Pass Thru file is future dated, the customer is able to delete the file prior to that day.

1. Navigate to **ACH** and choose **Pass Thru**, scroll to middle of the page where pending Pass Thru are found.
2. Click the trash can on the right side of the row of the Pass Thru
3. A confirmation dialog displays, click **OK**



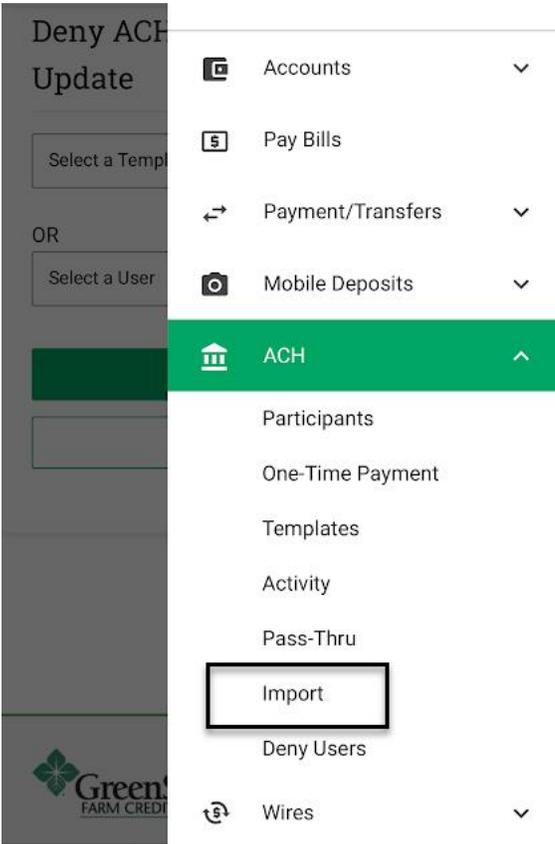
## Import

The import feature allows the user to import: Participants OR Create Templates & Participants based off an existing NACHA file.

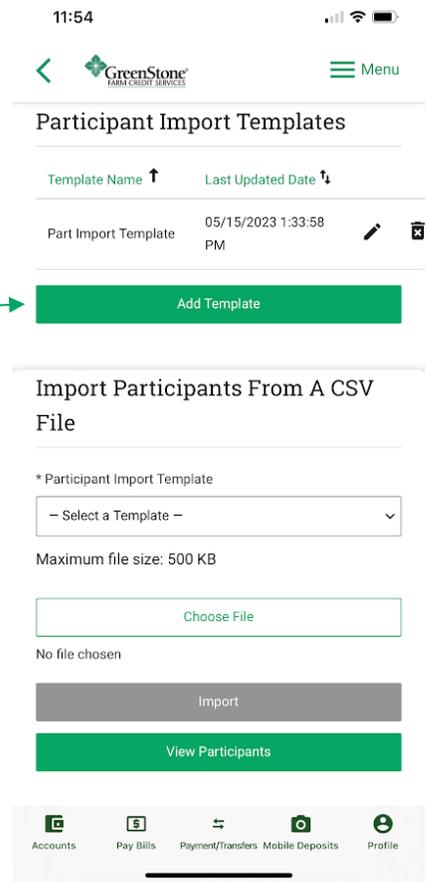
## Participant Templates

These are the steps to set up how a participant template should be formatted. If a user wants to import participants, the first step is to set up a template.

1. Click **ACH**, in that sub menu click **Import**, and in that sub menu click **Participant Templates**.



- 2. Click **Add Template**.
- 3. Name the template and choose whether to update existing participants by clicking the check box.



**If the user chooses to update existing participants, they can choose which criteria match based on such as Name, Nickname, Unique Identifier, and Account Number.**

4. Underneath the Field Order section, set the order the fields as they correspond to the excel template uploaded. This sets the order of the columns in the template.
5. Click **Save**.

Participant Import Templates **to**

\* Template Name

Update Existing Participants

Match Criteria

Name  
 Nickname  
 Unique Identifier  
 Account Number

If Account Number is selected, Routing Number and Account Type will also be included as match criteria.

Field Order

\* Name

Nickname

Institution Name

## Import from CSV File

Importing from CSV file is how to import large batches of participants. **Note that if these participants are in a transaction ACH file, and that file is uploaded, they are automatically uploaded.**

1. Click ACH, in that sub menu click Import, and scroll down to **Import Participants From A CSV File**

Import Participants From A CSV File

\* Participant Import Template

Maximum file size: 500 KB

No file chosen

2. Choose the Participant Template.

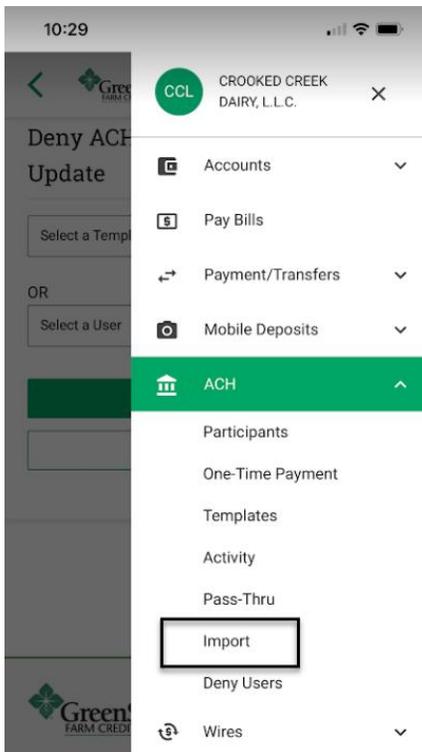
**NOTE: The user can click View Participants to see which participants are already added.**

3. Click Choose File and select the CSV file.
4. Click Import

## Import Templates and Participants From A NACHA File

There is the option to import from a NACHA file to create a template and it's participants.

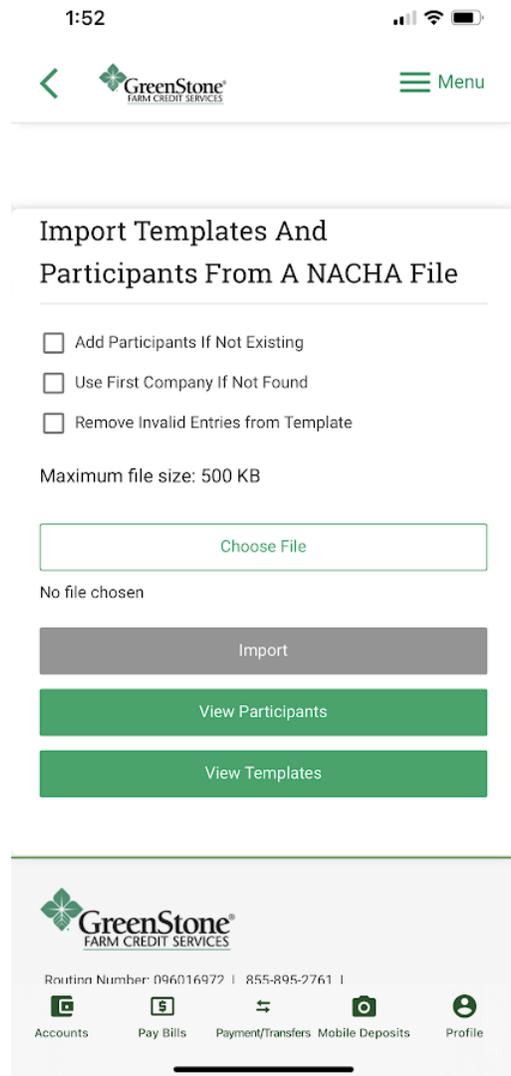
Click ACH, in that sub menu click Import, and scroll down to Import Templates And Participants From A NACHA File



1. Click **Choose a file.**
2. Choose the file and click **Open.**
3. Check the appropriate boxes of Add Participant if Not Existing, Use First Company If Not Found, Remove Invalid Entries from Template.
4. Click **Import.**
5. Success messages display for the participants added and the templates imported.
6. The template needs to be updated after the import is complete. Click **View Template.**
7. The name of the template will

contain "Import...Unbalanced" Click the **pencil** to edit.

8. Update the **Name of the template, Company,** and the **Offset Account**



## Wires

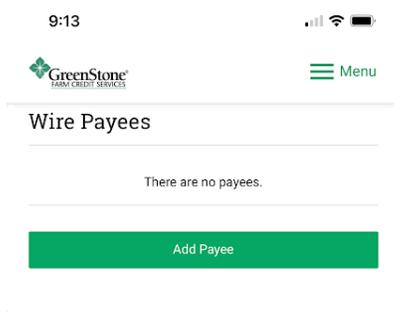
Users with the wire feature enabled and access the **Wires** menu option in the hamburger menu.

## Adding Payees

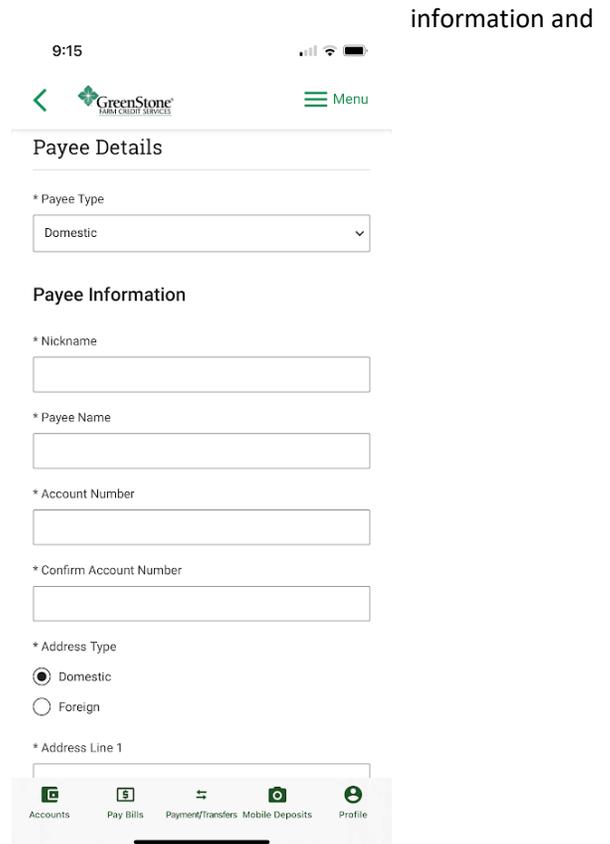
To send a recurring wire the user must add a payee. Navigate to **Wires** and select **Payees** from the drop down.



### Select Add Payee

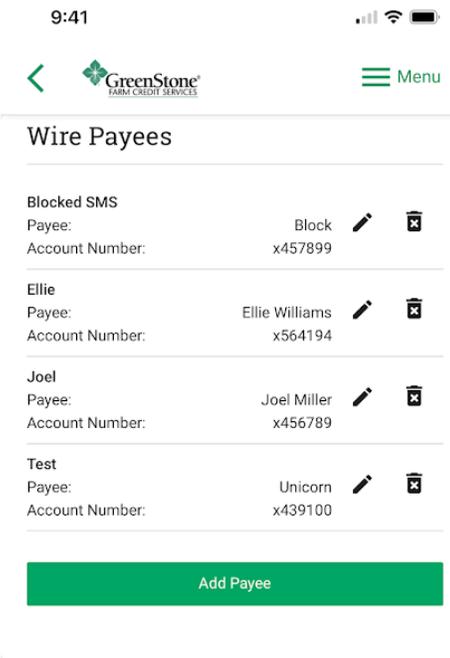


Fill in the Payee Type, Payee Information, and Payee Financial information and click **Save**.



## Managing Payees

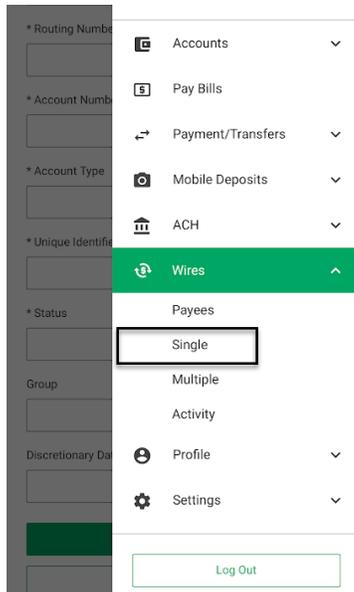
The user manage their payees at any time by navigating to Wire and selecting Payee.



The users can edit payees by selecting the pencil icon or delete them by selecting the trash icon.

## Single Wire Transfer

The user can initiate a signal wire transfer by navigating to **Wires** and selecting **Single** from the hamburger menu.



Fill in the information on the Initiate Single Wire Transfer screen and click **Submit**.

9:42

GreenStone  
FARM CREDIT SERVICES

Menu

### Single Wire

\* Payee

\* Funding Account

\* Amount

\* Scheduling Option

Memo

Submit

Cancel

## Multiple Wire Transfers

The user can initiate a signal wire transfer by navigating to **Wires** and selecting **Multiple** from the hamburger menu.

- Accounts
- Pay Bills
- Payment/Transfers
- Mobile Deposits
- ACH
- Wires**
  - Payees
  - Single
  - Multiple**
  - Activity
- Profile
- Settings

Log Out

The page displays with all Payees that have been added by the user. From this page the user can fill in the payment information for multiple payees and click **Submit**.

GreenStone  
FARM CREDIT SERVICES

Menu

### Multiple Wires

Joel  
 Payee Name:

Type: Domestic

Wire Date:

Account:

Amount:

Last: N/A Scheduled: \$4.12

Memo:

Ellie  
 Payee Name:

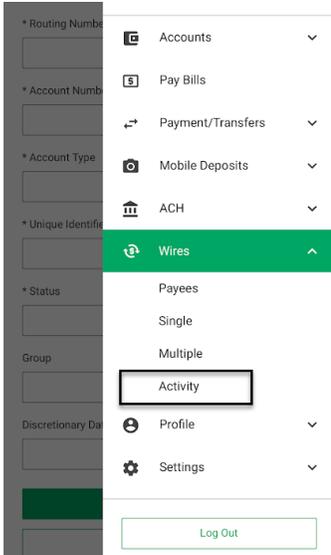
Type: Domestic

Wire Date:

Accounts Pay Bills Payment/Transfers Mobile Deposits Profile

# Wire Activity

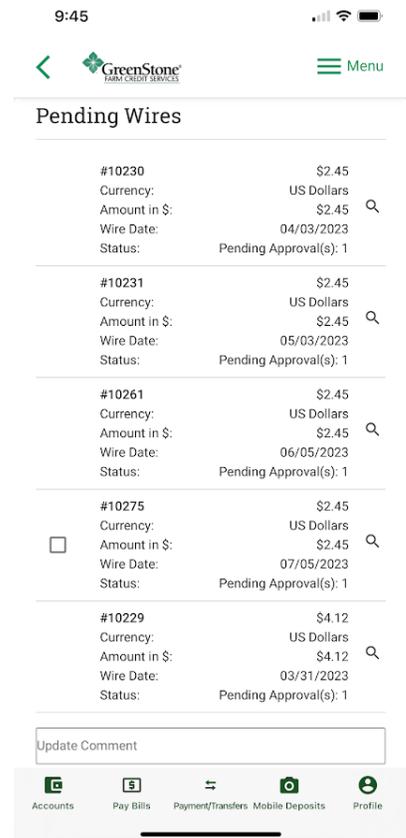
The user can view pending wires, scheduled wires, and wire history by navigating to **Wires** and selecting **Activity** from the hamburger menu.



This will bring the user to the landing page for Activity.

Click the magnifying glass to view the details of that wire transfer.

From the Pending Wires section, the user can select wires to approved or reject.



### Scheduled Wires

#11 \$2.45  
 Next Wire Date: 08/07/2023  
 Schedule: Every month, starting on 04/03/2023 and ending after 5 occurrences

🔍 🗑️

In the scheduled wires section, the user can delete recurring wires.

### Wires History

Show Search Options

#10275 2.45  
 Currency:  
 Amount in \$: \$2.45 🔍 ✎️ 🗑️  
 Wire Date: 07/05/2023  
 Status: Pending Approval(s): 1

The wire history section allows the user to edit and delete wires and view the status of wires.

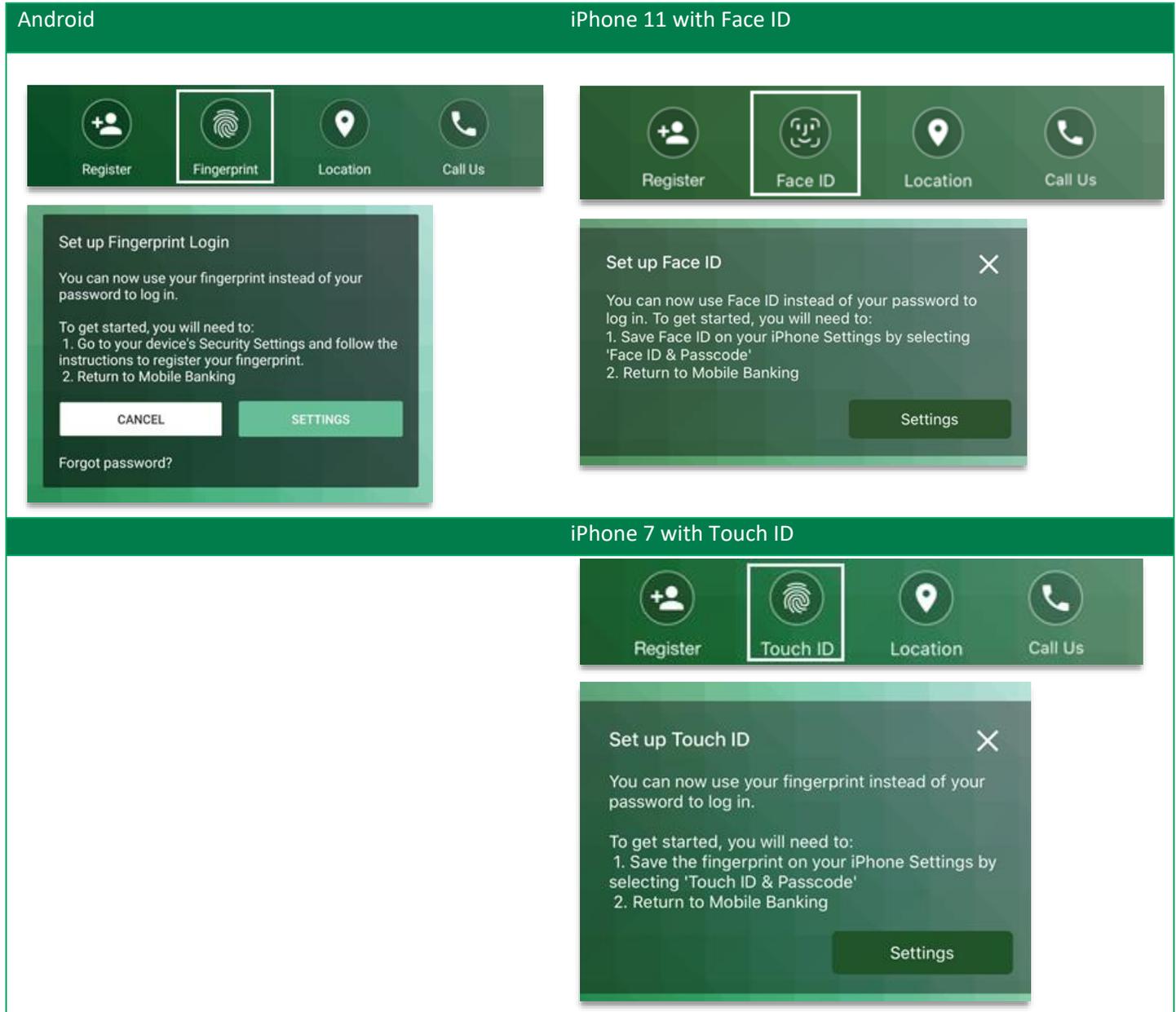
Export



# Setting up Fingerprint / Face ID

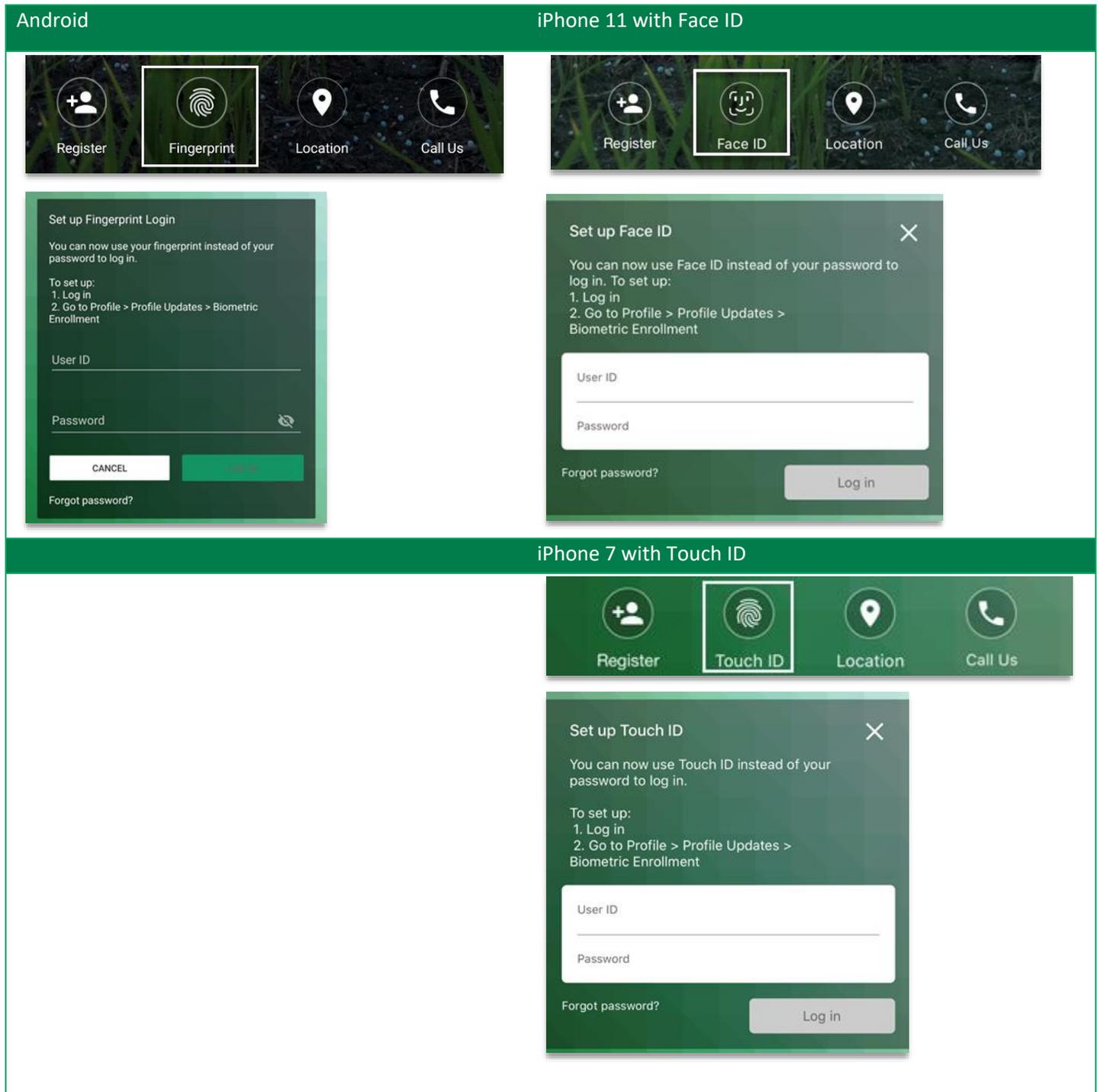
## Fingerprint / Face ID Does Not Already Exist

If the user does not already have a fingerprint/face ID set up, they receive the following message when they tap on the Fingerprint / Face ID icon. Selecting the **Settings** button brings up the *Biometrics and Security* screen on Android or on iPhone allowing them to set up a fingerprint or face ID.



# Fingerprint / Face ID Already Exists

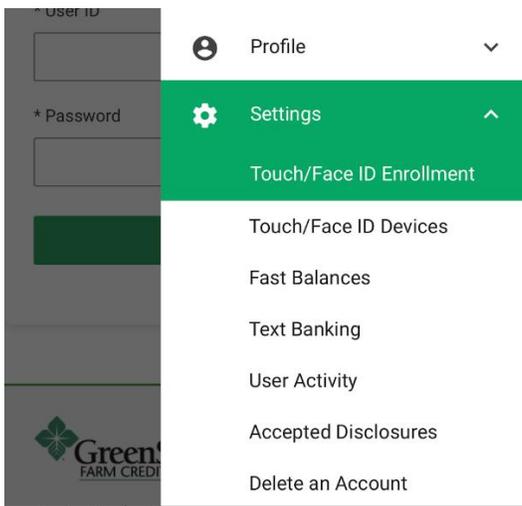
If the user already has fingerprint/face ID on their mobile device but have not enrolled the device through Architect, they receive the following message:



# Enroll the device in Touch/Face ID Enrollment

After the fingerprint / face ID has been set up, the device needs to be enrolled within mobile app.

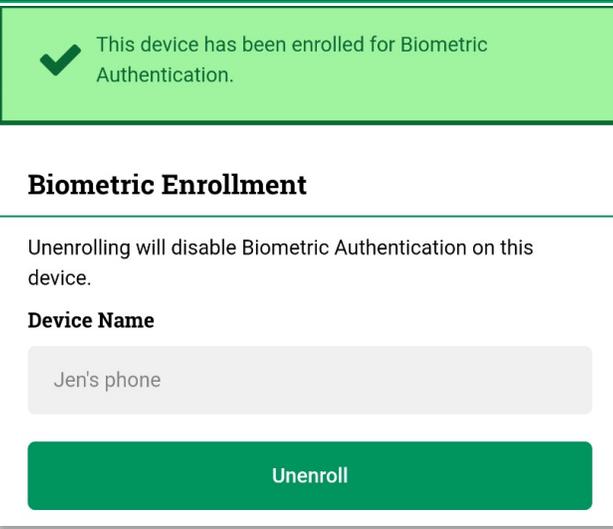
1. Navigate to Settings > Touch/Face ID Enrollment



2. Enter a Device Name and the portal User Id and Password

A screenshot of the 'Biometric Enrollment' form. It includes a title, a description: 'Biometric Authentication allows you to log into Mobile Banking with the Biometric Sensor on your device.', a 'Device Name (e.g., Mary's Phone)' field, a '\* User Id' field, a '\* Password' field, and a green 'Enroll' button.

3. A success message is displayed

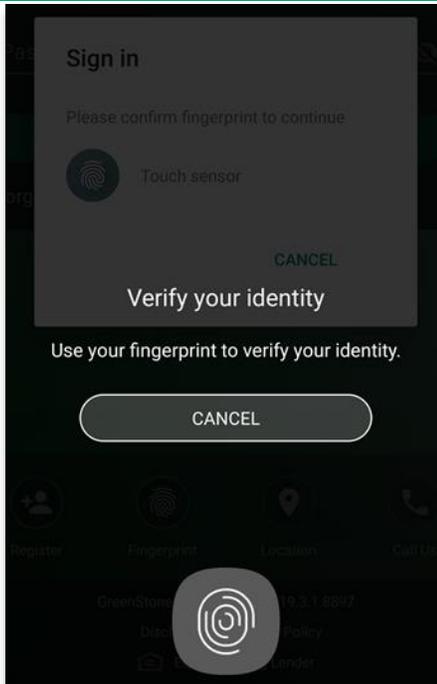


# Log in using Face/Touch ID

To set up the face/touch ID:

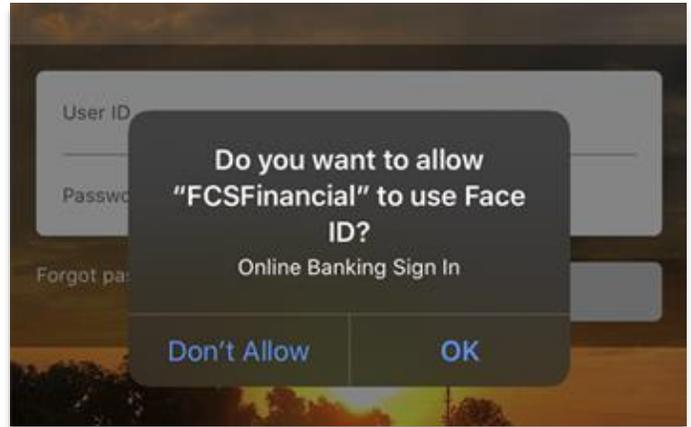
1. On the login page tap the **Face/Touch ID** icon
2. The screen prompts the customer to use their fingerprint or face to log into the app

Android

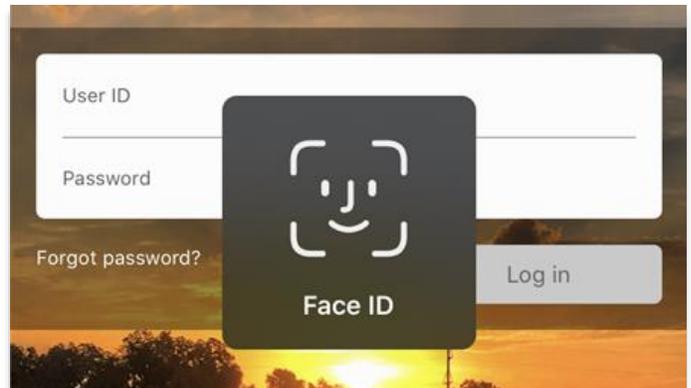


iPhone

First time using Face ID



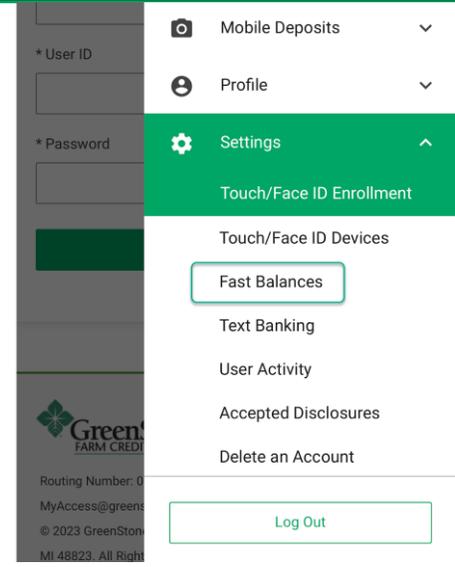
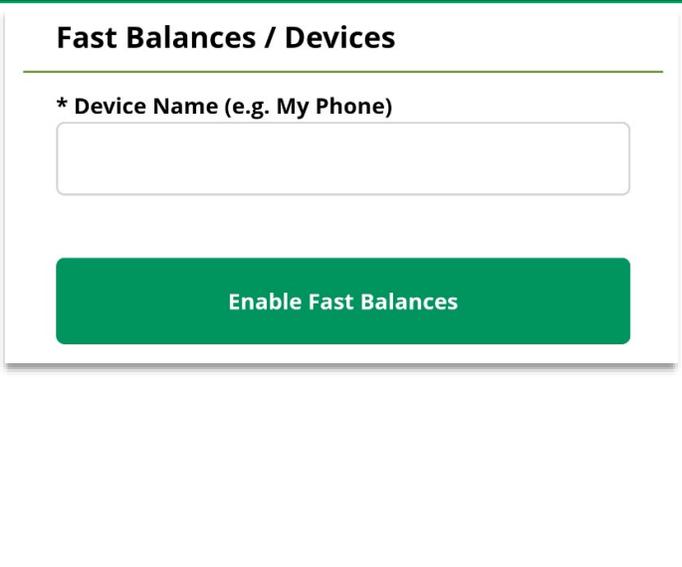
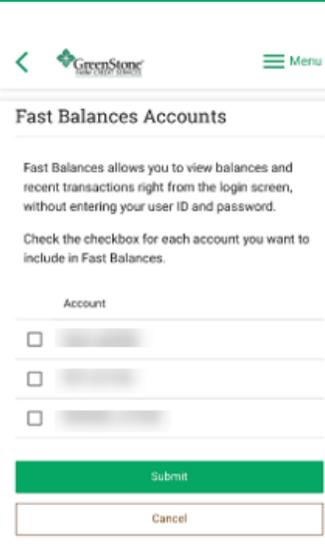
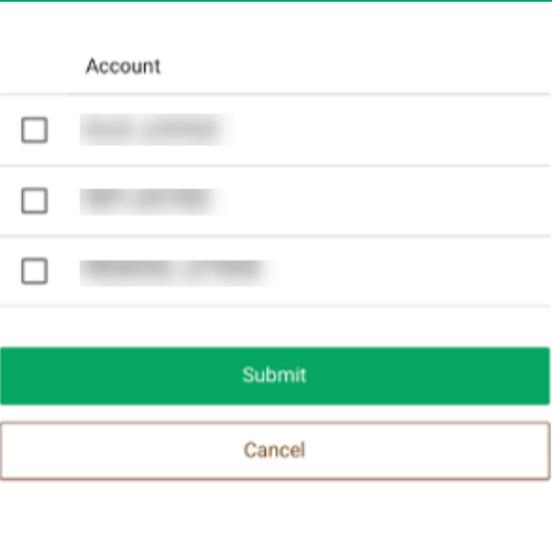
Subsequent Logins



# Fast Balances

Fast Balances allows users to view balances and recent transactions without having to sign into the app. Before Fast Balances can be used from the home screen, it first must be configured by going to **Profile > Profile Updates > Fast Balances** under the hamburger menu.

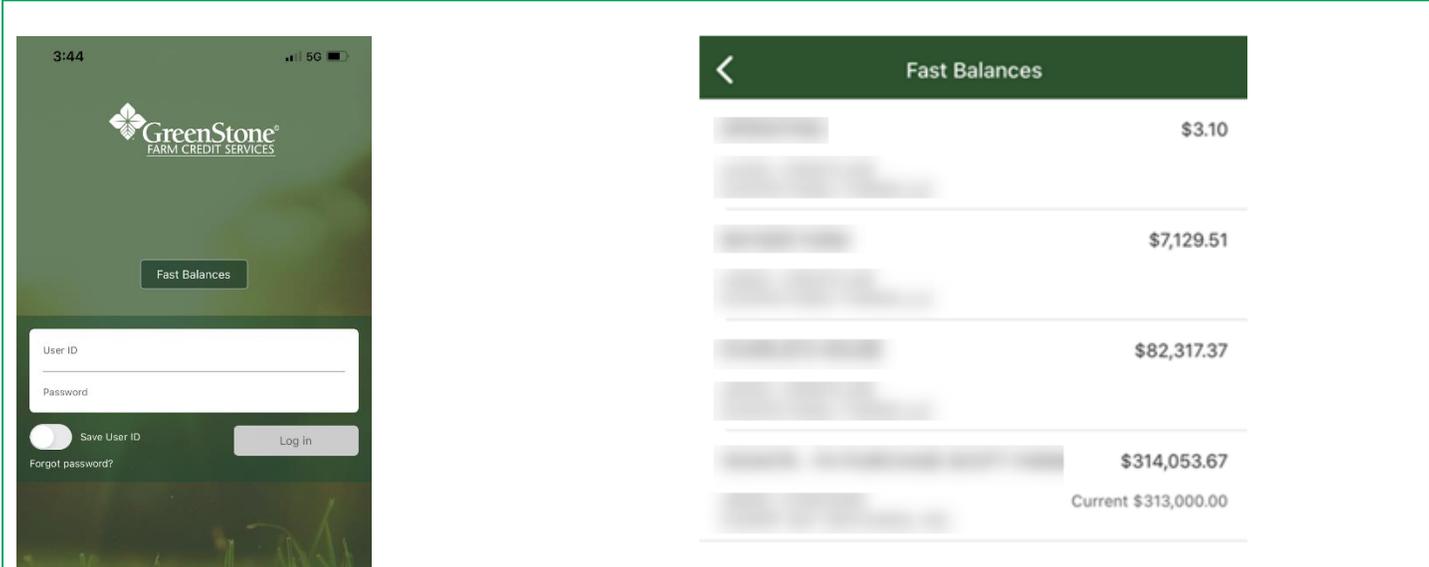
**NOTE: The accounts to be shown within Fast Balances can be selected on the desktop, but in order to add a device, it must be done through the mobile app. Both selecting accounts and adding devices can be done through the app.**

<b>1. Navigate to Fast Balances</b>	<b>2. Enter in a nickname for the device and select Enable Fast Balances</b>
	
<b>3. Select the accounts to see in Fast Balances.</b>	<b>4. Click Submit at the bottom of the page</b>
	

# View Fast Balances

On the login screen, tap the **Fast Balances** button.

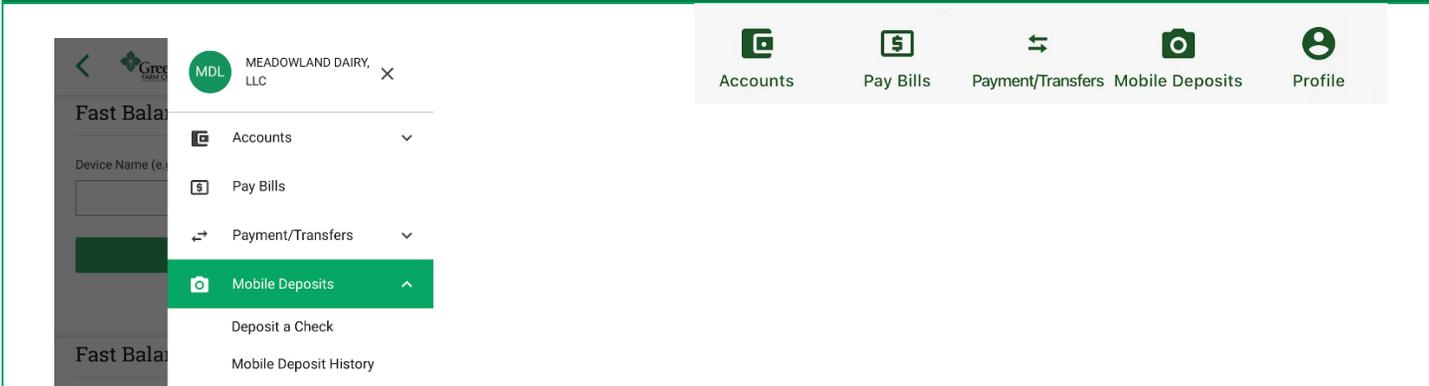
- 1. Tap Fast Balances
- 2. The accounts that have been setup to preview will show on the user's device



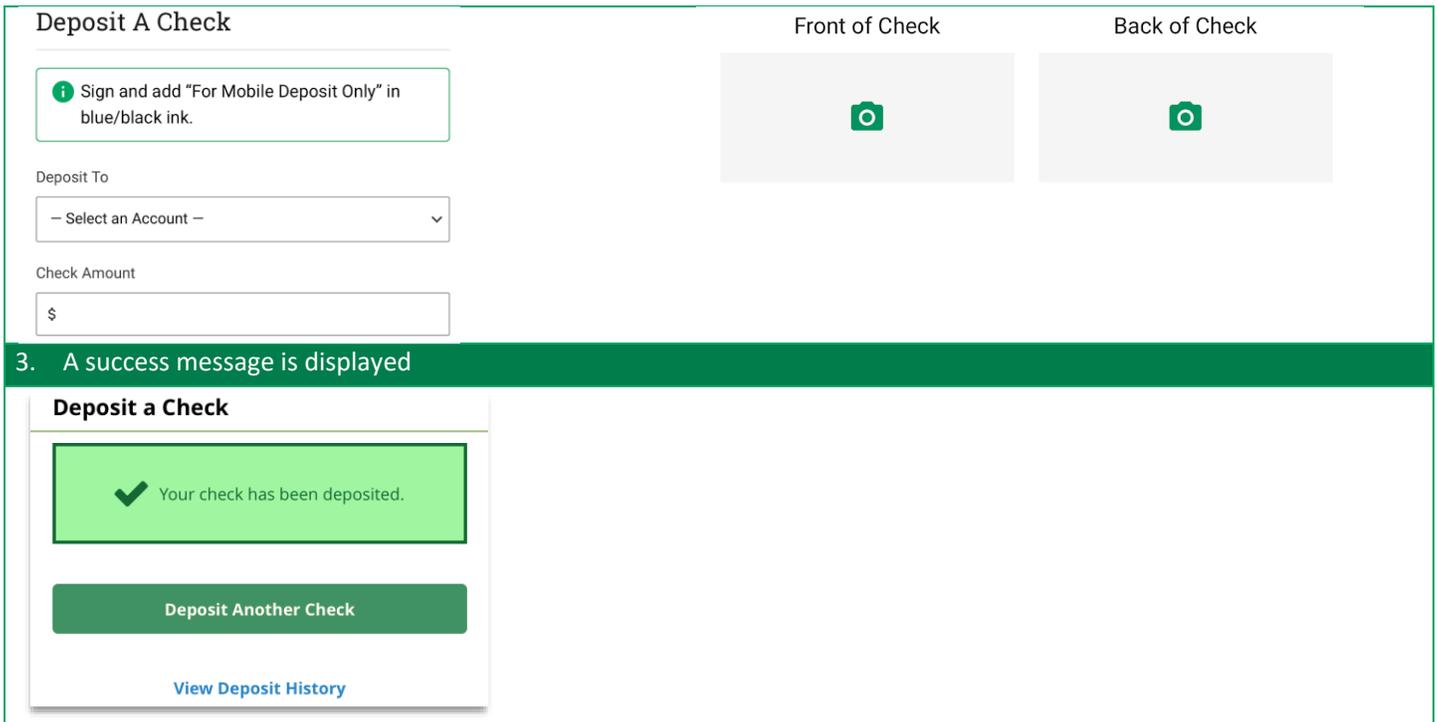
# Mobile Deposits

To deposit a check, customers click on the Mobile Deposit button in the footer navigation or access it through the hamburger menu in the top right hand corner. It is highly recommended to make sure the checks are written in blue or black ink as any light-colored ink may display an error and does not process.

## Navigating to Mobile Deposit



- 1. Select an account to deposit the check and the amount listed on the check
- 2. Select the camera icon to take photos of the front and back of the check.

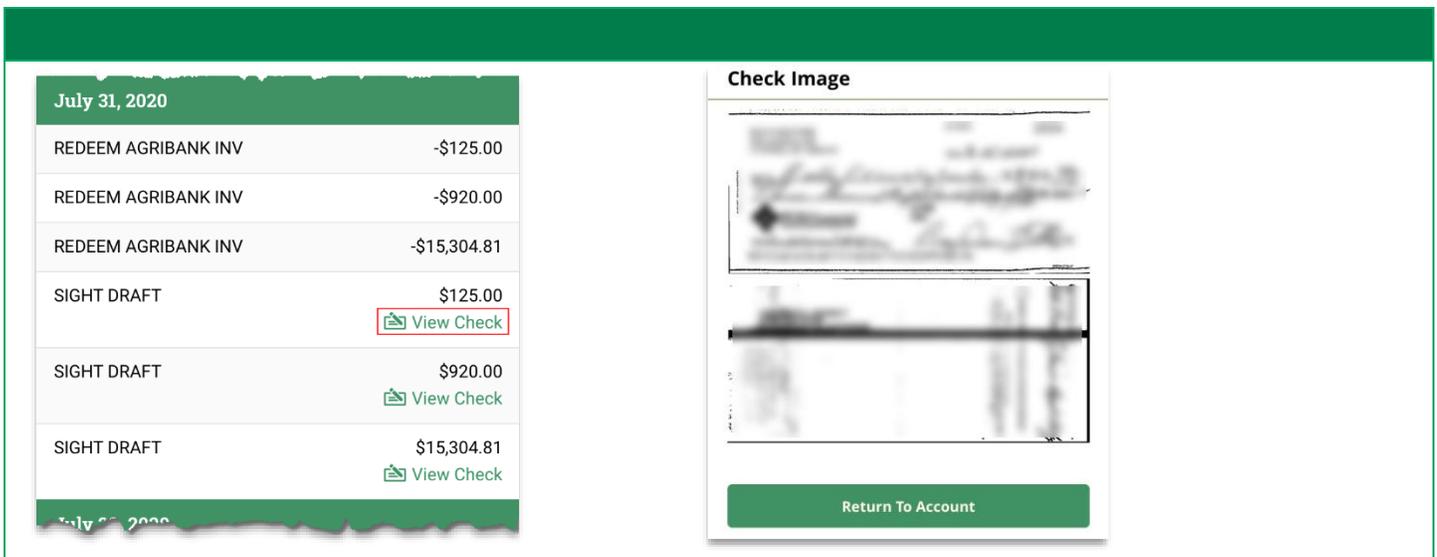


## View Deposit History

Recent deposits can be seen by clicking on the “View Deposit History” link at the bottom of the Deposit A Check page.

## Check Images

Check images are viewed by going to the account details and selecting the **View Check** link.



## Text Banking Commands

Architect supports the following commands. These commands are not case sensitive. The short code is 60464.

Command	Return	Notes
<b>bal</b>	Returns the balance of that loan	Texting the command 'bal all' returns the available balance of all accounts  The 'bal {nickname}' command can also be used to retrieve the balance of a specific account.
<b>hist</b>	Returns the last 5 transactions	
<b>more</b>	Returns the next 5 transactions	Used after the 'hist' command and can be done until there are no more transactions on the account.
<b>nick</b>	Returns a list of all account nicknames	
<b>help</b>	Returns the list of all commands	
<b>stop</b>	Unsubscribes user from text banking	

## Stopped Numbers

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When the stop command is provided, the number is added to the Stopped Numbers page listed under Profile > Stopped Numbers and is unable to receive any other authentication codes.