



# Business Online Banking Upgrade Launch Guide



# Communications from Sunrise About Our Online Banking Upgrade

Between now and April 25, 2017 you will be receiving a variety of messages from Sunrise Banks. We will be sharing important information with you to ensure you have smooth transition to our new Online Banking platform.

Please pay special attention to the product information below which illustrates what is changing and key timelines.

## Types of Communication:

**Email:** We will be sending some messages via email using the email addresses that are assigned to Online Banking users and account signers at Sunrise Banks. All links in our emails will bring you to <https://www.sunrisebanks.com>. If you receive an email that links you to another domain or appears to be suspicious, please contact us immediately at (651) 265-5600 and do not click on the link.

**Webinars:** All Online Banking users will be invited to join us for educational webinars. During these webinars we will showcase our new Online Banking, Mobile Banking and Treasury Management products and features. You will have the opportunity to submit questions during these live webinars. A list of webinar dates and times are available on page 6.

**Secure messages:** You may receive secure messages via our current Online Banking system.

**Letters:** You will receive letters with important conversion dates and additional details.

**Website:** Sunrise Banks will update [www.sunrisebanks.com](http://www.sunrisebanks.com) with information about the Online Banking system conversion.

## Important Dates

Additional details about these important dates are available in the below sections of the Launch Guide.

Date	Details
April 18-24, 2017	Access to Bill Pay will be unavailable
April 24 at 2:30pm CT	Access to Wire Transfer services will be unavailable
April 24 at 4:00pm CT	Access to ACH services will be unavailable
Tuesday, April 25, 2017	New Online and Mobile Banking launch

### Questions?

#### Digital Services:

(651) 265-5640  
M-F 8am-5pm

#### General Line:

(651) 265-5600  
M-F 9am-5pm,  
W 9am-6pm



## Statements and eStatements

Your paper and online statements will have a new look. You will have access to account statements and account history dating back to January 1, 2016. Upon logging in for the first time, you will be prompted to confirm workstation compatibility to view electronic statements and to re-select statement delivery preferences.

## Online Banking

You will notice a new look and a number of enhancements to Sunrise Banks' new Business Online Banking platform. Get more information by reading the product information sections below.

**First-time login with no security token:** Currently, security tokens are required for ACH and Wire originators, as well as Positive Pay users. Below are login instructions for access beginning April 25.

1. Enter your existing Access ID.
2. Enter your existing Password.
3. Validate your login which includes the registration of the device you are utilizing to access your Online Banking account. This requires the use of a one-time Secure Access Code, which is delivered to your pre-populated email or phone.

Select a delivery method to retrieve an automated Secure Access Code. The one-time Secure Access Code is only valid for 30 minutes. If the pre-populated information is no longer valid and requires updating, please contact us at (651) 265-5640.

4. Retrieve the Secure Access Code and enter the number in the field displayed in Online Banking.
5. Reestablish your password by entering your existing password in the field and confirming it by entering the password a second time.
6. You will have the option to register the device, so that a new Secure Access Code will not be required during each subsequent login.

It is not recommended to register a device if using a public workstation.

*Instructions continued on next page >*

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**First-time login with security token:** Currently, security tokens are required for ACH and Wire originators, as well as Positive Pay users. Existing security tokens will not be valid with the new Online Banking system, therefore, may be disposed as of April 25. Below are log in instructions for token access beginning April 25.

**Hard (physical) token:**

1. Enter your existing Access ID.
2. Enter the temporary password assigned to you.
3. Press the power button on your Symantec VIP token, and enter the code displayed on your token in the VeriSign token field.
4. Repeat step two once the code disappears from the token.
5. Enter the temporary password assigned to you, enter a new password, and confirm the new password by entering it a second time.

**Soft (electronic) token:**

1. Install the VIP Access app from the Apple App Store or Google Play.
2. Open the app to obtain your unique credential ID which is displayed at the top of your screen.
3. Contact us at (651) 265-5640 to provide us your unique credential ID.
4. Once we have captured your unique credential ID, you will be able to move forward with the login process by entering the temporary password assigned to you.
5. Enter the security code displayed on your screen in the VeriSign token field.
6. Wait for a second security code to display on your screen and enter it in the VeriSign token field. The second security code will display in thirty seconds.
7. Enter the temporary password assigned to you, enter a new password, and confirm the new password by entering it a second time.

**Transaction history** dating back to January 1, 2016 will be available in the new system. To view older transactions contact our Digital Services Team at (651) 265-5640 during normal business hours Monday – Friday 8am-5pm CST.

**Recurring transfers:** Previously established recurring transfers (transfer of money from one Sunrise account to another) will continue in the new Online Banking platform. There will be a blackout period from April 17-24, 2017. During this time you will be unable to make changes or stops to these transfers. If you need to change or stop an existing transfer contact a Sunrise Banks Relationship Banker.

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## Online Bill Pay

In addition to a new look, Bill Pay provides additional features such as dual control and access through our mobile app. All payee information along with recurring payments will automatically transfer to our new system.

Access to Bill Pay will be unavailable from April 18 – April 24. Previously scheduled bill payments will be processed during this time if they are setup prior to April 18. Payees previously established prior to April 18 will be available.

**Bill Pay alerts:** You will need to set up new alerts when you log in for the first time.

**eBills\* (electronic bills):** eBills will not be automatically converted into the new Online Banking platform. Upon accessing the new Online Banking system you will need to setup new eBills with the companies whom you've chosen to use. We recommend making a list of your eBills now for easy setup later.

*\*eBills are online versions of billing statements that are paid through Bill Pay.*

**Bill Pay history:** In the new Online Banking system, you will be able to view 90 days of historical payments.

## Positive Pay

We have enhanced Positive Pay to provide you with more tools to manage your accounts. You will not be able to import a check issued file after 11:00am CT, April 24. Access will be available on April 25.

## ACH

New and improved functionality. All active templates as of close of business on April 14 will be available when you log in on April 25. Access to ACH services will be unavailable from 4:00pm CT, April 24 – April 25. Previously scheduled ACH files will be processed during this time if they are setup prior to 4:00pm CT, April 24.

**ACH templates:** Previously used ACH files and ACH templates utilized prior to April 17, 2017, will be available in the new system.

## Wires

New look with additional functionality and security. Access to online Wire Transfer services will be unavailable from 2:30pm CT, April 24 – April 25. Previously scheduled wire transfers will be processed during this time if they are setup prior to 2:30pm CT, April 24.

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**Wire templates:** Templates established prior to April 17 will be available in the new system.

## EZ Deposit

Same system and look, but you will now access EZ Deposit through Online Banking using your Online Banking credentials. Therefore, an Online Banking account will be required if you don't currently have one. If you are currently an EZ Deposit customer, with no Online Banking access, please look forward to additional communications from us to get enrolled.

## Mobile Banking

On April 25, the Sunrise Banks mobile app will be available for download in the Google Play store and in the Apple App store. This app is free to use, but you must be an Online Banking customer to use the app. With our mobile app, we are also offering Mobile Remote Deposit Capture. This new feature allows you to take a picture of a check and deposit it into your account. See a bank representative for more information and for deposit limits.

## Webinar Dates and Times

Training opportunities will be available to you. You are welcome to attend one or more of the sessions. The sessions will all cover the new Online and Mobile Banking product, as well as changes and enhancements to many of our Treasury Management services. The sessions will be available via Zoom Video Conferencing and be accessed on any device or computer with the Internet.

Date	Time	Calendar Link
Thursday, March 23, 2017	10-11:00am CST	<a href="https://Q2software.zoom.us/j/187741486">https://Q2software.zoom.us/j/187741486</a>
Monday, March 27, 2017	2-3:00pm CST	<a href="https://Q2software.zoom.us/j/391776895">https://Q2software.zoom.us/j/391776895</a>
Thursday, March 30, 2017	10-11:00am CST	<a href="https://Q2software.zoom.us/j/376520120">https://Q2software.zoom.us/j/376520120</a>
Tuesday, April 11, 2017	10-11:00am CST	<a href="https://Q2software.zoom.us/j/285825848">https://Q2software.zoom.us/j/285825848</a>
Thursday, April 13, 2017	2-3:00pm CST	<a href="https://Q2software.zoom.us/j/111495901">https://Q2software.zoom.us/j/111495901</a>

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## Are You Ready for the Launch?

- ☐ Did you attend or view a webinar?
- ☐ Did you review the important dates and are you prepared for time periods our services will be unavailable?

### Have you:

- ☐ Printed online statements that you may need to reference in the future?
- ☐ Documented eBill and Bill Pay information for set ups on/after April 25?

## Tasks to Perform on Launch Day, Tuesday, April 25

- ☐ Visit [sunrisebanks.com](http://sunrisebanks.com) to access the new online banking system.
- ☐ Log in with your current user ID, password and new security token (if applicable).
- ☐ Set up:
  - ☐ Online Banking and Bill Pay Alerts
  - ☐ eBills

## Questions?

Sunrise Banks has a dedicated team ready to answer your questions and assist you through the conversion. For questions related to Business Online Banking and Treasury Management services, including first-time login and Mobile Banking, contact a member of our Digital Services Team at (651) 265-5640 during normal business hours Monday – Friday 8am-5pm CST.

You may also call the general Sunrise Banks number at (651) 265-5600 during normal business hours Monday – Friday 9am-5pm and Wednesday until 6pm.