



The Bank
of Tampa

813.872.1200 | thebankoftampa.com

DIGITAL BANKING

PERSONAL GO-LIVE BOOKLET



The Bank
of Tampa

THE BANK OF TAMPA'S NEW DIGITAL EXPERIENCE

The Bank of Tampa is proud to soon provide you with a new digital banking experience, when you log on Monday, February 10, 2025, to our Personal Online Banking and Mobile Banking platforms. Please refer to this go-live booklet prior to our launch and while you're getting accustomed to the new system, as it contains important dates, action items, helpful navigation tips, and more.

We have been working behind the scenes to ensure your digital experience matches the in-person banking experience you've come to know and appreciate from The Bank of Tampa!

We invite you to do more with digital, so you can do more with your banking – anytime and anywhere!



IMPORTANT PRE GO-LIVE DATES

FEBRUARY 6, 2025, 12 P.M.– FEBRUARY 10, 2025, 9 A.M.

Bill Pay(CheckFree) – The system is inaccessible, however, reoccurring payments will not be disrupted during this time.

FEBRUARY 6, 2025, 12 P.M. – FEBRUARY 11, 2025, 9 A.M.*

Zelle® Only – For any prescheduled payments between February 6, 2025 and February 11, 2025, you will need to either reschedule payments prior to or after this outage window.

*As we prepare to launch the new platform, access to one-time transfers, edits to existing transfers, or other functions including stop payments, mobile deposits, debit card management, etc. will be unavailable during this time.

FEBRUARY 7, 2025, 12 P.M. – FEBRUARY 10, 2025, 9 A.M.

Online and Mobile Banking is view only during this time. There will likely be a disruption in service after 5 p.m. up until 9 a.m. the following morning.

FEBRUARY 7, 2025, 12 P.M. – FEBRUARY 10, 2025, 9 A.M.

Mobile Deposits – You will not be able to process mobile deposits during this time.

ON OR BEFORE FEBRUARY 7, 2025

QuickBooks/Quicken – Complete your first action as outlined in the QuickBooks/Quicken conversion guide. Visit the Client Digital Resource page to view guide.

FEBRUARY 10, 2025, 9 A.M.

The Bank of Tampa's new Online and Mobile Banking is live, and the new mobile app is now available for download in the Apple and Google Play Store.

STARTING TODAY

Ensure your contact information on file with our Bank is correct. Update your address, phone/cell, and email via www.bankoftampa.com/client-contact-information-update/. If you wish to have access to your account records during the outage, please print/download your statements now.

Please note that all dates are subject to change. For the most up-to-date information, visit our Client Digital Resource page at www.bankoftampa.com/digital or scan the QR Code below.



IMPORTANT ACTIONS TO TAKE ON OR AFTER FEBRUARY 10, 2025



QuickBooks/Quickken– Starting February 10, 2025, to avoid disruption, you will need to take action and configure your QuickBooks to the new digital banking platform.



Setup Alerts – If you currently utilize Balance, Transaction, or Security Alerts, these established settings/preferences will NOT convert to the new online and mobile platform and will need to be established upon initial login.



Bill Pay – If you are enrolled in Bill Pay, all previously established payees and scheduled one-time or recurring bill payments will be converted to the new online and mobile platform. Upon initial login, we recommend accessing Bill Pay and reviewing any scheduled payments, ensuring they were appropriately converted.



Transfers – All previously scheduled, future-dated or recurring transfers will be converted to the new online and mobile platform. Upon initial login, we recommend accessing Transfers/Money Movement, located in the Online Activity Center, to ensure internal, external and Zelle® transfers were converted correctly.



WHAT'S NEW



User Experience – User-friendly, modern design.



More Transfer Options – Send money to fellow clients within The Bank of Tampa network.– **Coming Soon!**



Bill Pay – Easily pay bills and schedule payments with our new Bill Pay experience.



CardHub for Debit Cards – Now manage your debit cards from your desktop, as well as your mobile device.



Credit Score Access – With Savvy Money, receive real-time credit score monitoring.– **Coming Soon!**



Single Sign-on – Now easily access Bill Pay, Check Reorders, MyCardStatement, and Zelle® with a single sign-on.



GETTING STARTED:

MOBILE BANKING

Effective 9 a.m. on February 10, our new Mobile Banking app will be available for download via the Apple app store and Google Play store.

Search “Bank of Tampa: Mobile Banking.” Once your download is complete, do not forget to delete your old Bank of Tampa app from your mobile device.



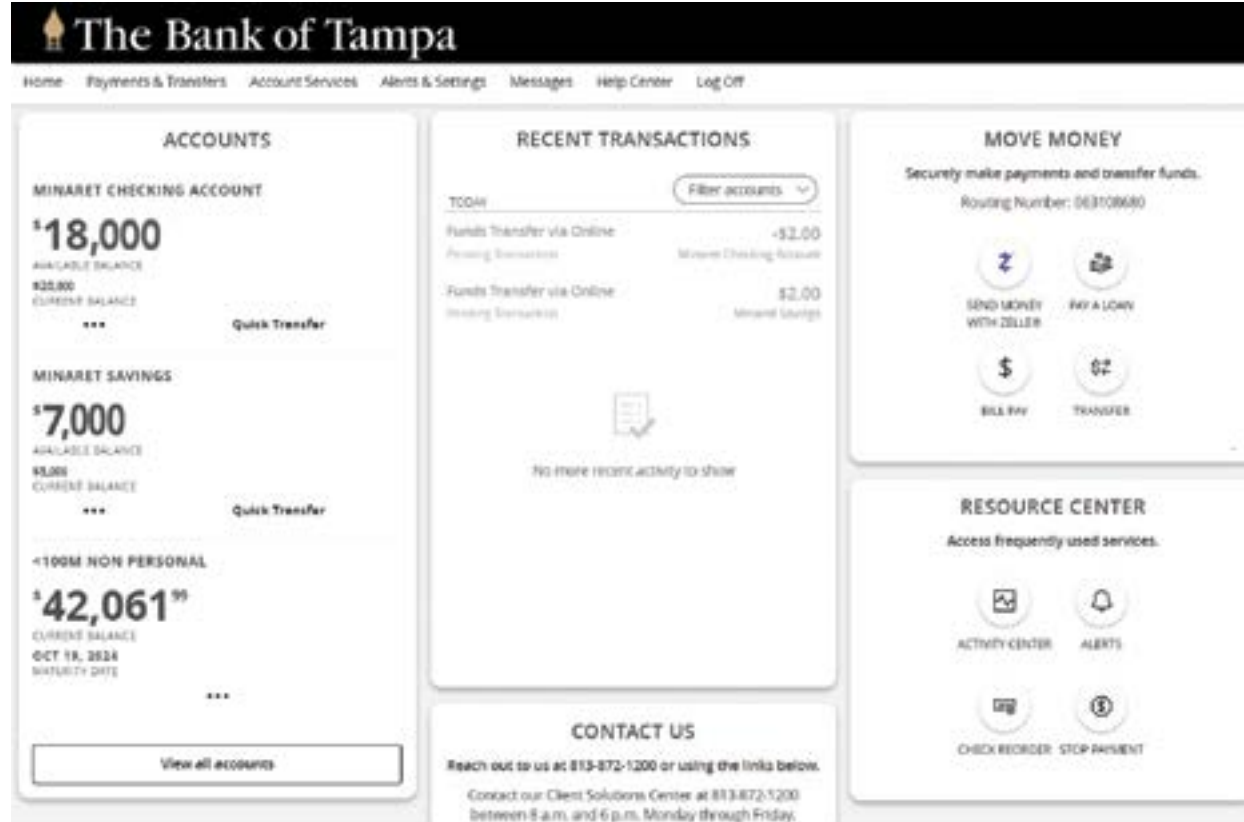
ONLINE BANKING



Upon logging in for the first time to our new Personal Online Banking, you will be prompted for security purposes, to complete the multi-factor verification process using one of the “targets” that will appear on the screen. A target refers to the cell phone or email address that we have on file for your relationship.

A secure access code will be sent to the selected “target” (cell phone or email address). Once received, enter the code in the login screen and register your device, if you so choose. You will then be prompted to establish a new password which will serve as your password going forward unless you change it. Once these steps are complete, you are now able to proceed into the new platform.

In addition, from the initial login page, you will now have the ability to unlock your account, reset your password and retrieve a forgotten login ID.



NAVIGATING THE HOME PAGE

The following pages will outline the features and services found on various pages throughout the site and will be listed from left to right.

Left Panel – A list of Accounts within your relationship will appear here. If you have more than ten accounts at The Bank of Tampa, you will have the ability to select “View all Accounts” to expand your view.

Middle Panel – A list of Recent Transactions across your Bank of Tampa accounts will appear here. A Contact Us section will also appear in the center panel just below “Recent Transactions” and contains our Client Solutions phone number as well as our regular business hours.

Right Panel – The Move Money panel features quick access to The Bank of Tampa’s routing number and provides quick links to “Pay Loans” and “Transfer Funds.” The Quick Links panel provides easy access to the following frequently used services or features:

- **Online Activity Center** – List of recent transactions, recurring transactions and deposited checks
- **Alerts** – Establish and manage account alerts to include balance and transaction notifications
- **Statement Viewer** – Retrieve account statements for your accounts
- **CardHub** – Manage your debit card including establishing debit controls and alerts, manage your PIN, report a lost or stolen card, view spending insights and temporarily lock your card if it’s been misplaced
- **Stop Payment** – Initiate a stop payment on a check or ACH
- **My Card Statement** – View credit card transactions and credit card statements

PAYMENT & TRANSFERS

Payments

- **Pay Loans** – Make, schedule, and manage your loan or line of credit payments
- **Pay Bills** – Make, schedule, and manage your bill payment
- **Zelle®** – Quickly send and receive money using a mobile number or email

Transfers

- **Funds Transfer** – Transfer money between your accounts
- **Transfer within The Bank of Tampa** – Securely transfer to another Bank of Tampa client – **Coming Soon!**

Account Management and Activity

- **Manage Accounts** – Manage and set favorites for your internal and external accounts
- **Online Activity Center** – View and manage transactions created online
- **Connect External Accounts** – Connect accounts from other institutions to simplify transfers

Account Services

- **E-Statement**
 - **Statement Viewer** – View and download statements for your accounts
 - **Statement Delivery Preferences** – Review and update statement delivery preferences
- **Check services**
 - **Stop payment** – Place a stop payment request on a check
 - **Check reorder** – Reorder paper checks for any checking account
- **Credit and Debit Card Management**
 - **My Card Statement (Credit Cards)** – View and manage credit card balances and statements
 - **Card Hub (Debit Cards)** – Monitor and manage debit card usage
 - **Credit Score Access** – With Savvy Money, receive real-time credit score monitoring – **Coming Soon!**

ALERTS & SETTINGS

Alert Management

- **Alerts** – Manage security, account balance, and transaction alerts
- **Push Notifications (Mobile Only)** – Set up push notifications for alerts to your mobile device

Security Settings

- **Updated Password** – Update your online banking password
- **Update Login ID** – Update your online banking Login ID
- **2-Factor Authentication** – Update your delivery options for 2-factor login authentication
- **Update Biometrics (Mobile Only)** – Enroll in Face ID or Fingerprint ID for use during the login process

Preferences

- **Contact Information** – Update your phone number and email address – **Coming Soon!**
- **Change of Address** – Update the mailing address for your accounts – **Coming Soon!**
- **Manage Accounts** – Manage and set favorites for your internal and external accounts
- **Accessibility** – Enable high-contrast mode for more accessible reading

Messages

Send and receive messages from The Bank of Tampa. If the message is urgent, please call us!

HELP CENTER

Connect with Us

- **Banking Office Locator** – Find a banking office near you
- **Digital Banking Feedback** – Provide feedback to the Digital Banking team about your experience
- **Client Solution Center Connect (Mobile Only)** – This will open your phone's dialer with our Client Solution Center phone number pre-filled







ATM Locations

- **Allpoint ATM Locator** – Find an Allpoint ATM near you
- **Presto! at Publix ATM Locator** – Find a Presto! at Publix ATM near you

Educational Resources

- **Video Help Guides** – Watch tutorials related to features and functions within online banking
- **Written Help Guides** – View step-by-step guides of features and functions within online banking

ACTION ICONS

-  **Tool Tips (Systemwide)**
Provides activity specific helpful hints
-  **Ellipsis icon on Mange Accounts**
Enables additional actions for an account
-  **Double Ellipses on Manage Accounts**
Use to reorder items on the Accounts Page and Home Screen
-  **Star on Manage Accounts**
Select to favorite an account
-  **Calendar Icon on Online Activity Center and other screens**
Select dates to search or transact
-  **Magnifying Glass on Online Activity Center**
Enables search function on the Transaction History/ Account Details page



WE'RE HERE TO ASSIST

Contact Us

Should you have questions that are not answered in this booklet or require additional assistance, please contact your relationship manager or our Client Solutions Center at **813.872.1200**.

To assist you during this digital transition, our Client Solutions Center has been upgraded with new technology and more support staff to assist in supporting you.

Resources

The following additional resources will assist with our new Personal Online and Mobile Banking:

- **Go Live Booklet (digital version)** – www.bankoftampa.com/digital
- **Video Guide/Tutorials** – www.bankoftampa.com/educationcenter
- **Written User Guide** – www.bankoftampa.com/educationcenter

Contact Us with Feedback Related to our New Digital Experience

Digital Banking Team: DigitalBanking@bankoftampa.com