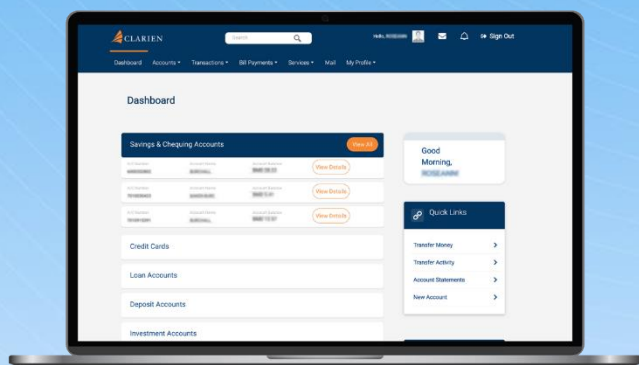




# User Guide for Commercial Banking



From enhanced features and transfer capabilities, this system was designed to help you reach your financial goals.

## PROTECT YOUR DATA

As part of our ongoing commitment to safeguarding your personal and financial information, we would like to remind you about the importance of being vigilant against phishing attempts. Phishing is a fraudulent practice where individuals attempt to obtain sensitive information such as usernames, passwords, and credit card details by disguising as a trustworthy entity.

To protect yourself from falling victim to phishing attacks, please keep the following in mind:

**1. Be cautious of unsolicited emails or messages.**

If you receive an email or message asking for personal information or directing you to a suspicious website, do not click on any links or provide any sensitive information.

**2. Verify the authenticity.**

Always verify the sender's email address or contact information before responding to any requests for personal information. Legitimate financial institutions will never ask you to provide sensitive information through non-secure channels.

**3. Secure your online accounts.**

Ensure that your passwords are strong, unique, and regularly updated. Enable multi-factor authentication wherever possible to add an extra layer of security to your accounts.

**4. Keep your devices and software updated.**

Regularly update your devices, including computers and smartphones, with the latest security patches and software updates to protect against vulnerabilities that could be exploited by hackers.

**5. Report suspicious activity.**

If you suspect that you have received a phishing email or been targeted by a phishing attempt, report it to us immediately. By reporting such incidents, you can help prevent others from falling victim to similar attacks.

Remember, your security is our top priority, and we are committed to working together with you to ensure the protection of your personal and financial information.

Thank you for your continued trust in Clarien Bank.

## **USER GUIDE CONTENTS**

**Your iBank Dashboard**

**Corner Menu**

**Savings & Chequing Accounts**

**Loan Accounts**

**Deposit Accounts**

**Account Statements**

**Transfer to Own Accounts**

**Transfer to Another Clarien Account**

**Transfer to Other Bank**

**International Wires**

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**Manage Beneficiaries**

**Manage Templates**

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**View Registration Details**

**Initiate Utility Payments**

**Maintain Linkages**

**Service Requests**

**Upload A File**

**User Role Maintenance**

**Rule Maintenance**

**Financial Workflow**

**Division Maintenance**

**Update Account Preference**

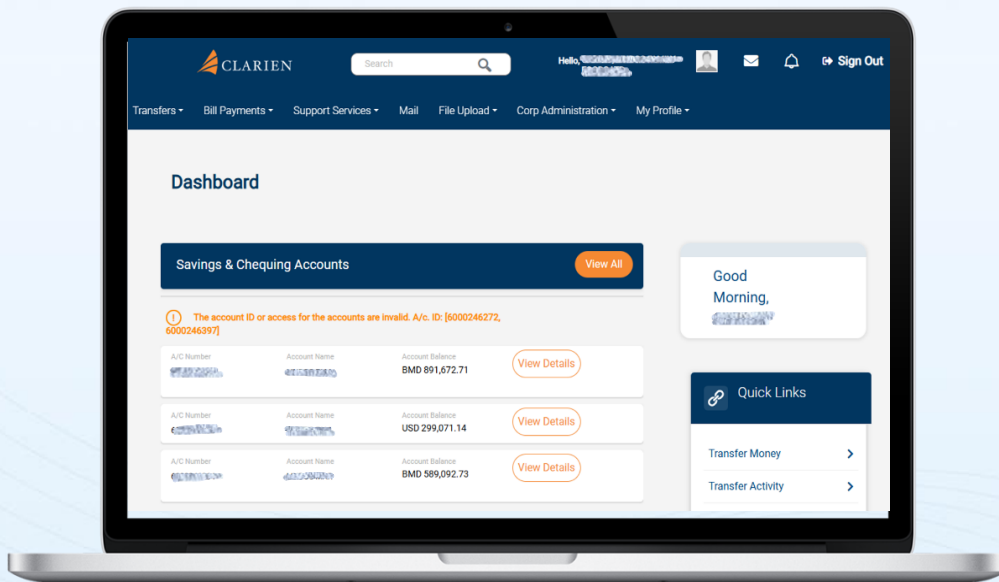
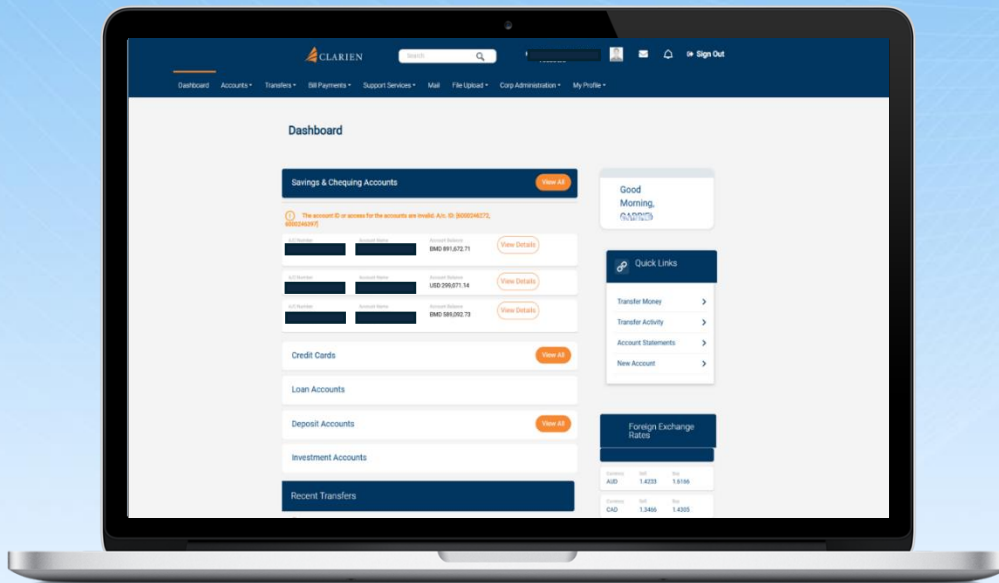
**Corporate Snapshot**

**My Profile**

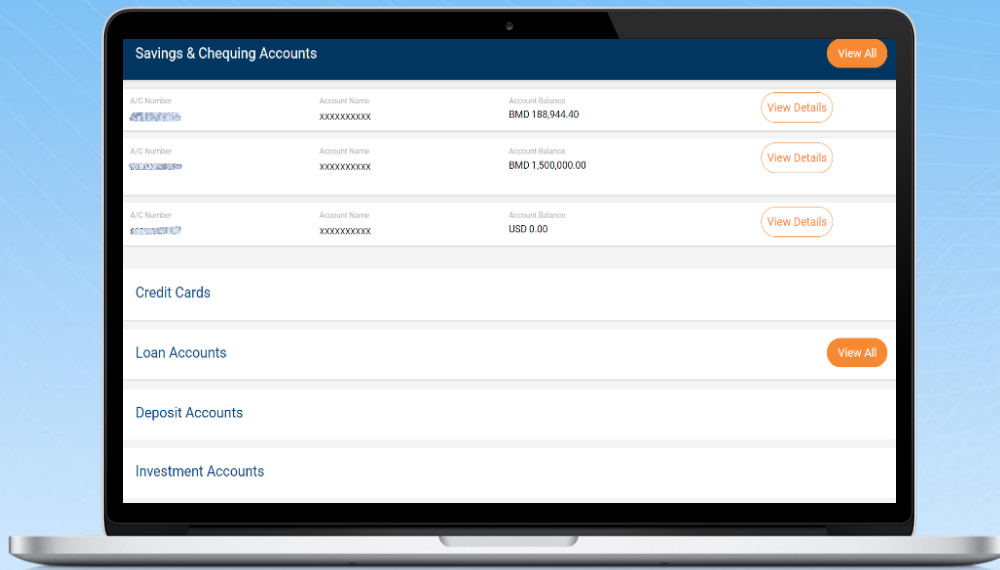
## YOUR iBANK DASHBOARD

Your Dashboard is your Clarien iBank homepage. From here, you can initiate all online transactions and services.

From the top menu you can access your Accounts, the Transactions menu, Bill Payments, Mail, Services and My Profile.

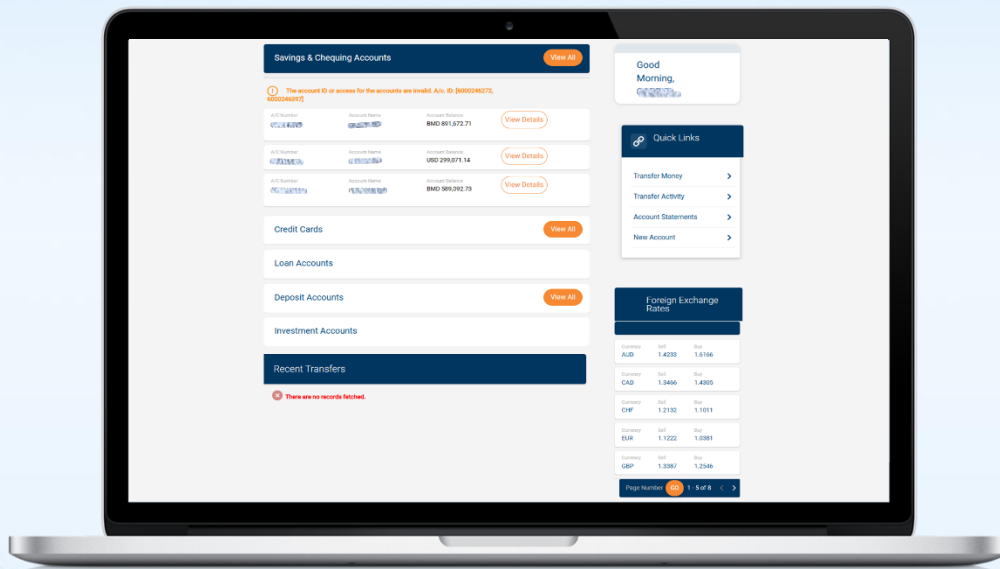


In the top right corner, you'll see your profile name and photo, a mail icon to access your secure messages, a bell icon for account notifications and your sign out function.



You may also access all of your accounts within the main section of the page.

- Just click on the account type and your accounts will appear.
- Select the View Details button for additional information, or the View All button to see all your accounts per type.

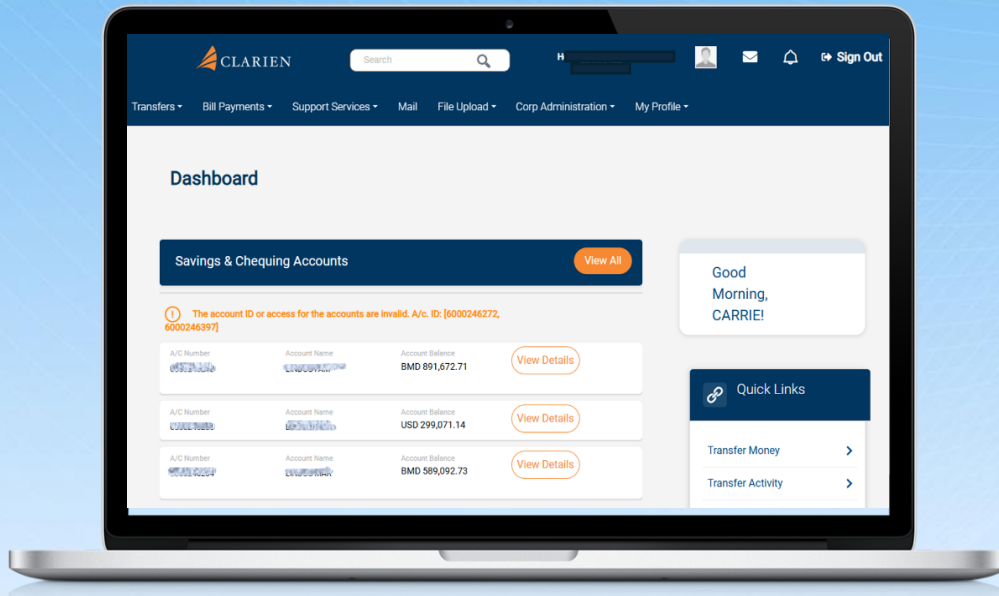


A Quick Links menu is also available on the page to easily transfer money, view transfer activity and account statements or even open a new account.

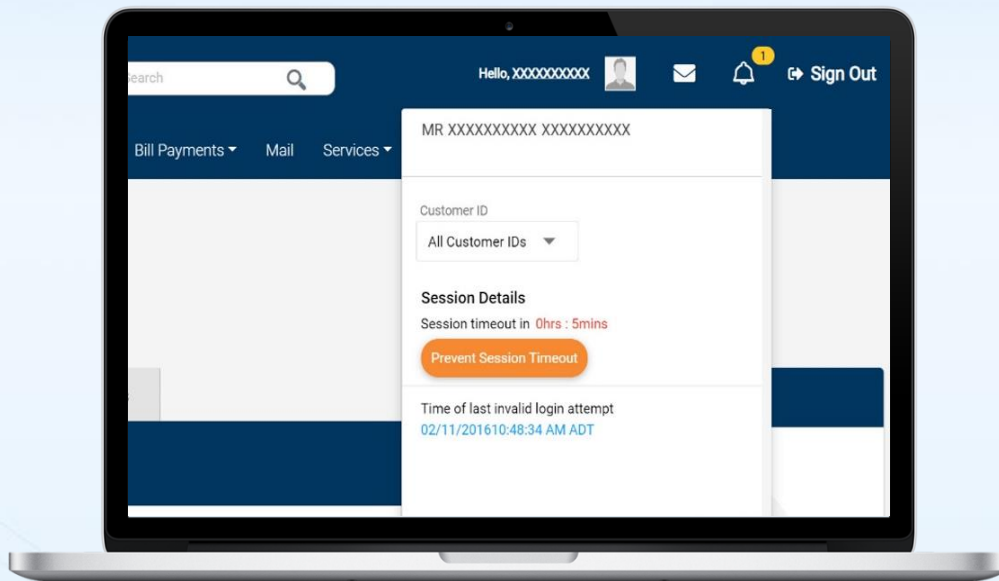
Foreign Exchange Rates are also available on your Dashboard.

While navigating through your online banking account, you can always return to your Dashboard by selecting Dashboard from your top menu.

## TOP CORNER MENU

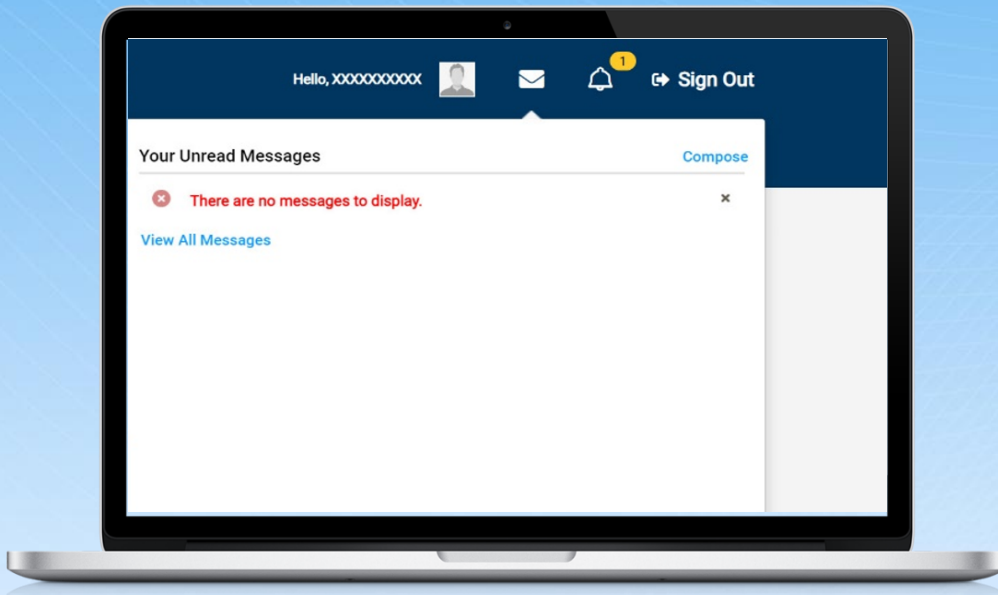


Your top corner menu includes quick access to important profile and notifications features.



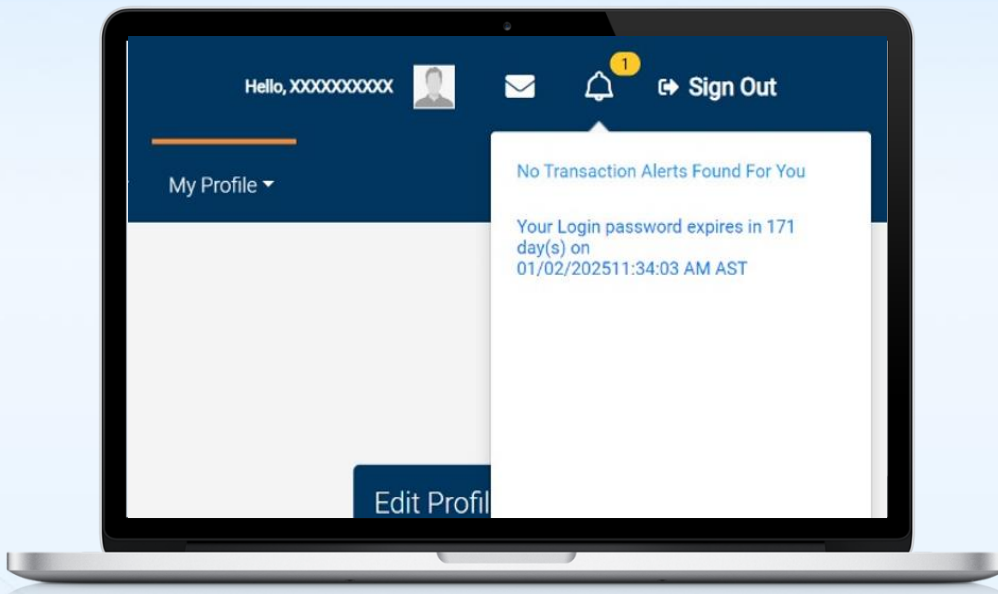
Click on your name to view all Customer IDs

Or to prevent your session from timing out.



Click on the envelope to view your unread messages.

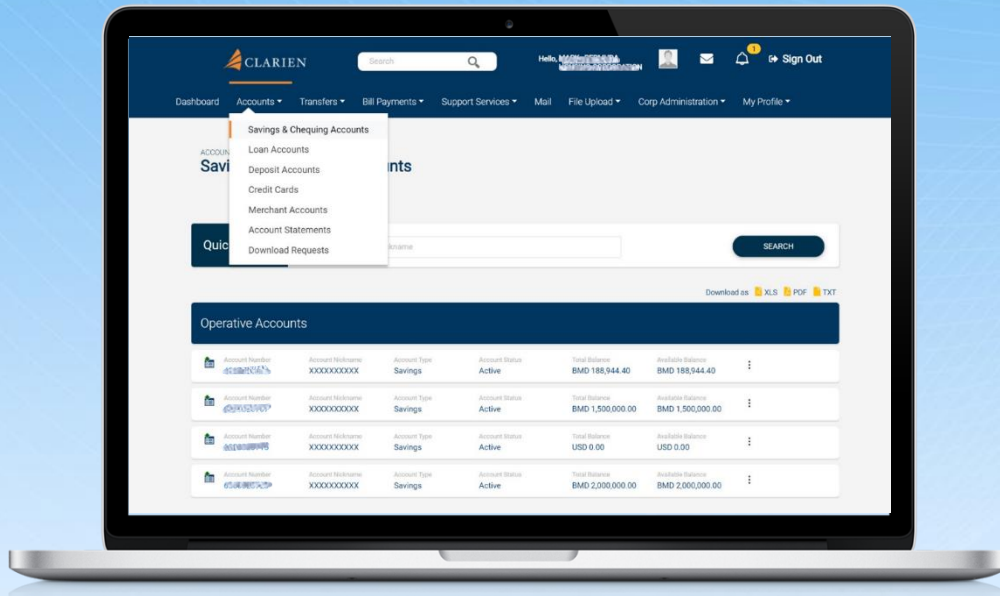
You can also choose to view all messages by selecting the link or compose a new message.



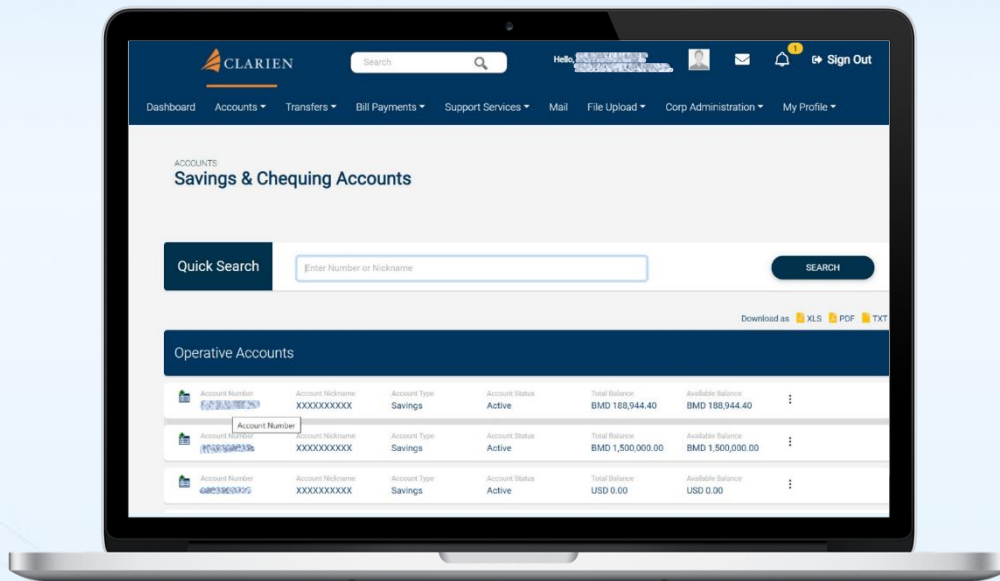
Click on the bell icon to view account alerts. A number next to the icon indicates unread alert messages.

Finally, click on Sign Out to securely end your session.

## SAVINGS & CHEQUING ACCOUNTS



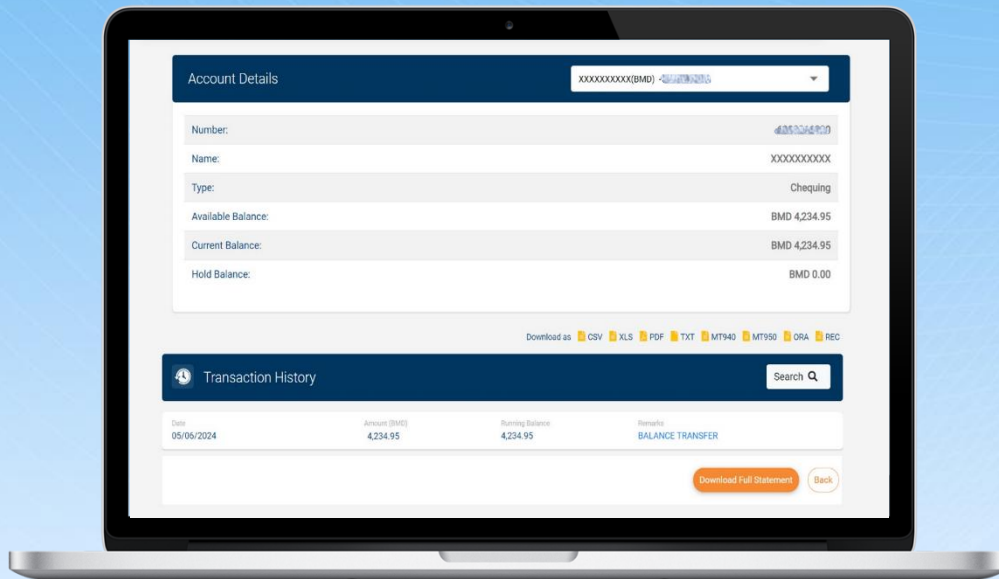
*When you select the Savings and Chequing Account link, your accounts will display.*



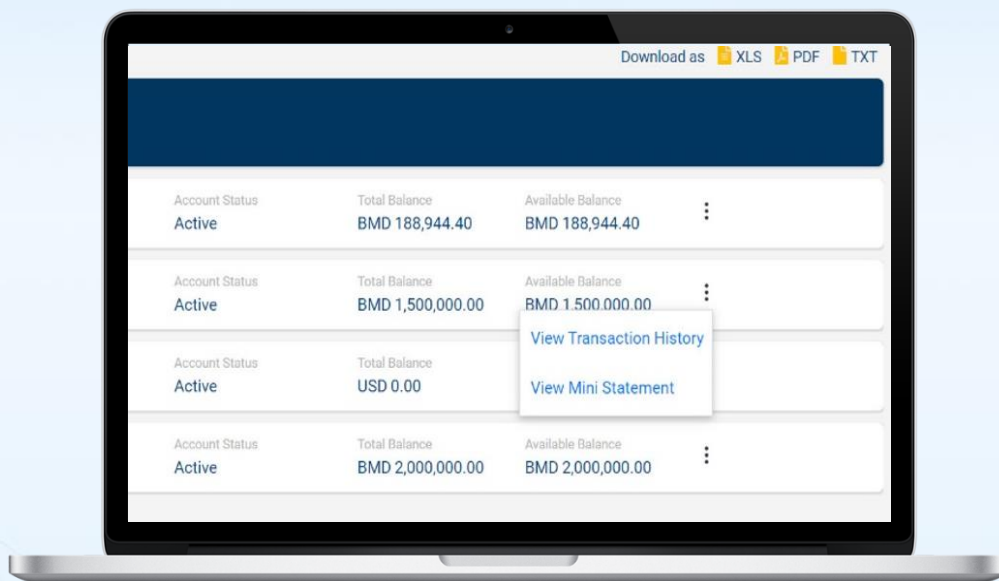
Use the Quick Search function to enter the Account Number or Nickname to quickly locate a specific account.

Above your accounts list, you may select the Download function to download the list of accounts. Simply select your preferred file type.

From your accounts list, click on the account number.



Account Details are now visible.



You'll notice 3 dots to the right of each account. This is your More Actions menu.

Click on the dots for additional options, including viewing your transaction history, or mini statements.

Transaction History

Account: XXXXXXXXXXX(BMD) - 0000000000

Date From (dd/MM/yyyy): (The date range must not exceed the limit 365days)

Date To (dd/MM/yyyy)

Amount Type: All

Amount From: Amount To:

Sorting Order: Descending Ascending

Clear Search

| Date       | Amount (BMD) | Running Balance | Remarks          |
|------------|--------------|-----------------|------------------|
| 05/06/2024 | 4,234.95     | 4,234.95        | BALANCE TRANSFER |

Download Full Statement Back

When Transaction History is selected, use the drop-down option to choose the account.

Enter the date range, amount details and your sorting preference.

Select the Search button to view results or select Clear to begin a new search.

Transaction History

Account: XXXXXXXXXXX(BMD) - 0000000000

Date From (dd/MM/yyyy): (The date range must not exceed the limit 365days)

Date To (dd/MM/yyyy)

Amount Type: All

Amount From: Amount To:

Sorting Order: Descending Ascending

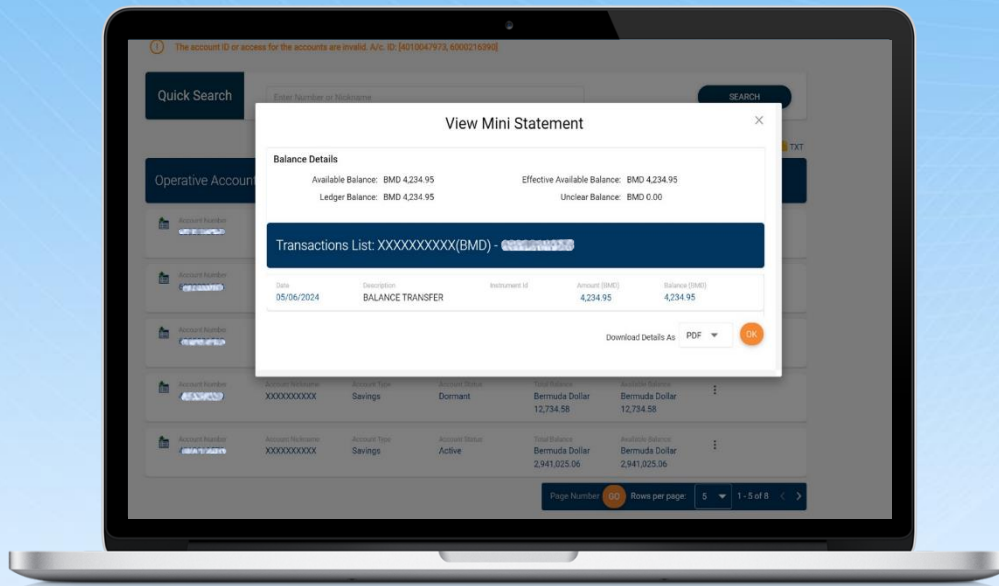
Clear Search

| Date       | Amount (BMD) | Running Balance | Remarks          |
|------------|--------------|-----------------|------------------|
| 05/06/2024 | 4,234.95     | 4,234.95        | BALANCE TRANSFER |

Download Full Statement Back

You may Download a Full Statement by selecting the option at the bottom of the screen.

Select the Back button to return to your list of operative accounts.

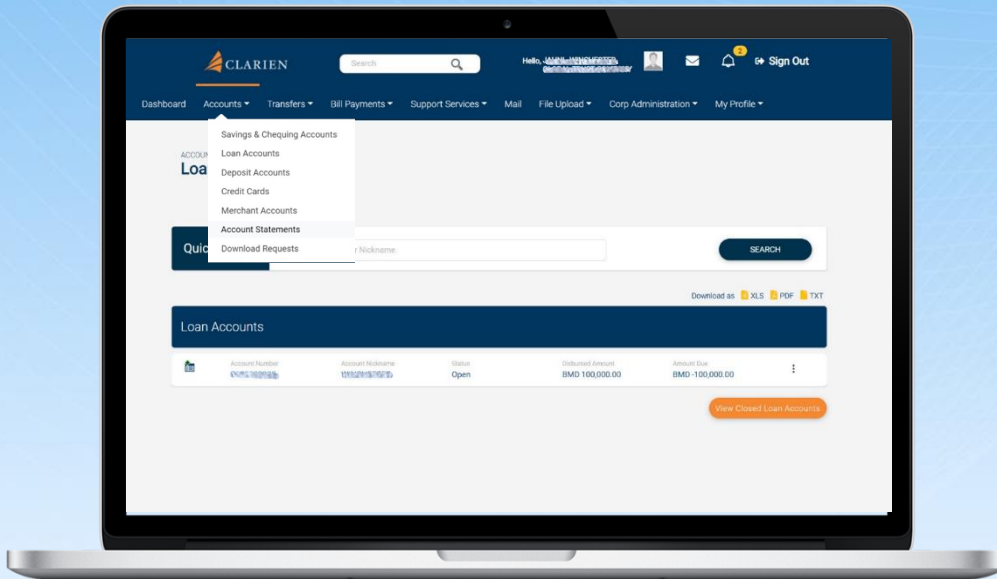


*You can also select to view and download a mini statement from the More Actions menu.*

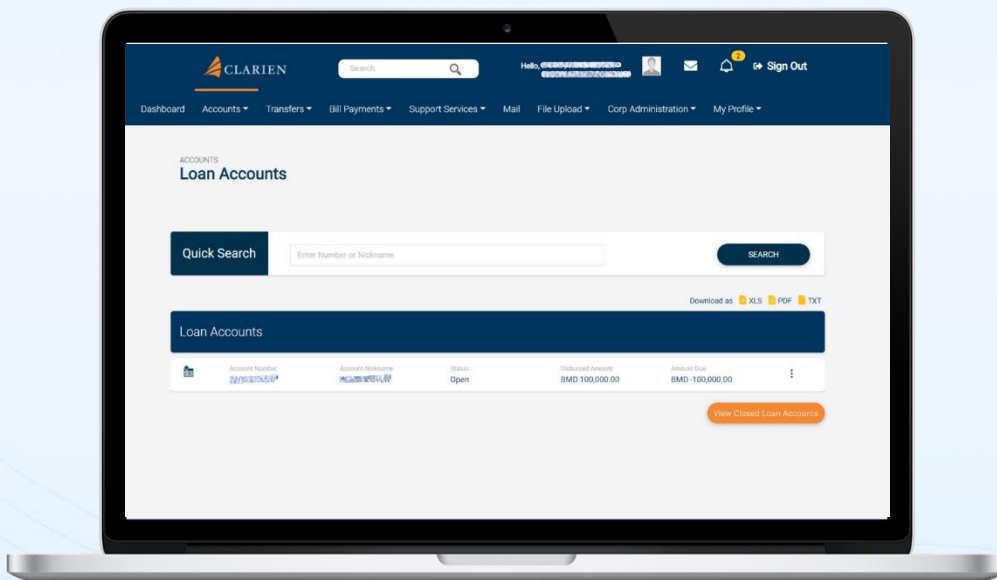
*To download, select your preferred file type, then OK. Your mini statement will then download to your system. Check your Download file folder, or the location of downloaded files on your system to view or print your mini statement.*

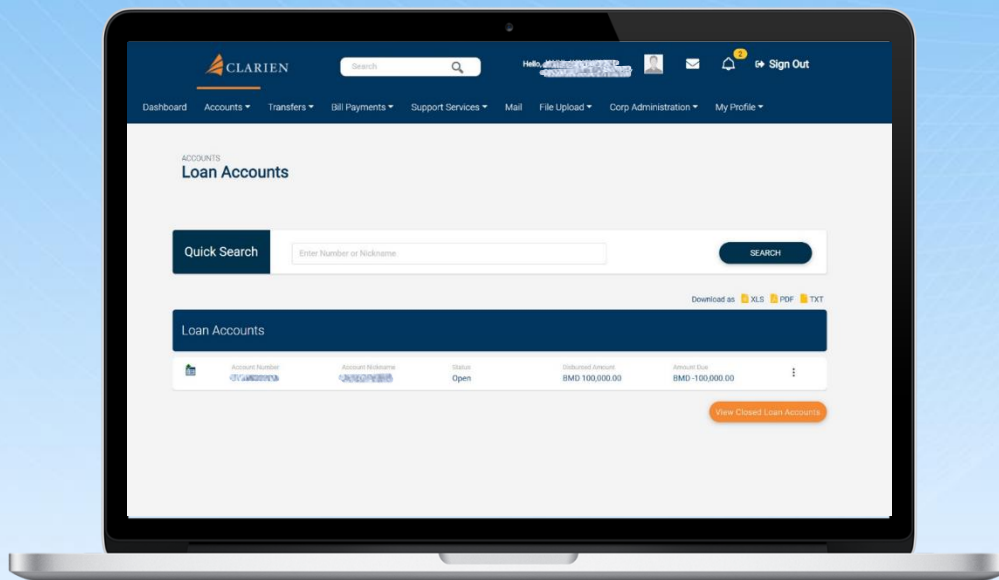
## LOAN ACCOUNTS

Select Loan Accounts from the Accounts menu. Your Clarien loan accounts will display.



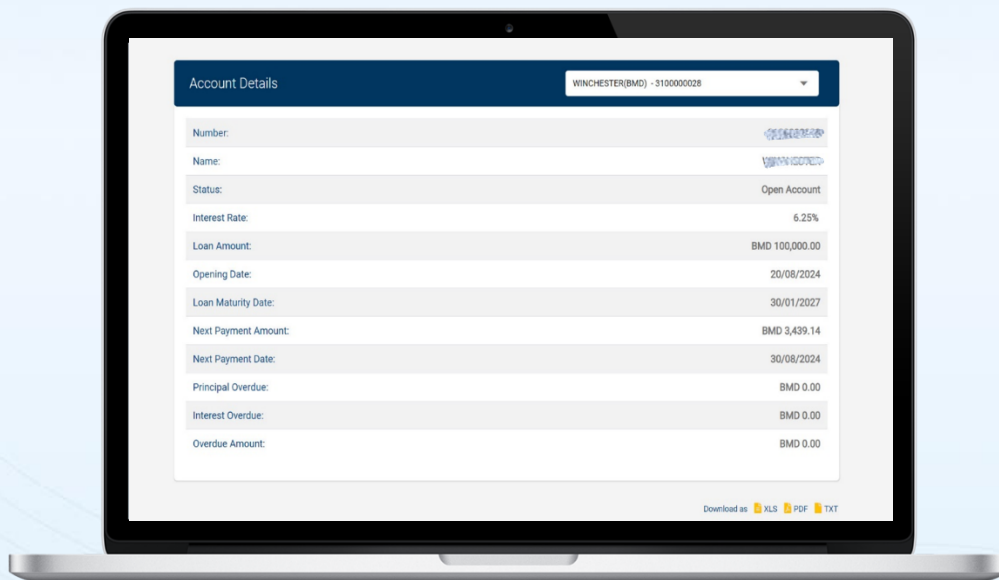
Use the Quick Search function to enter the Account Number or Nickname to quickly locate a specific account.



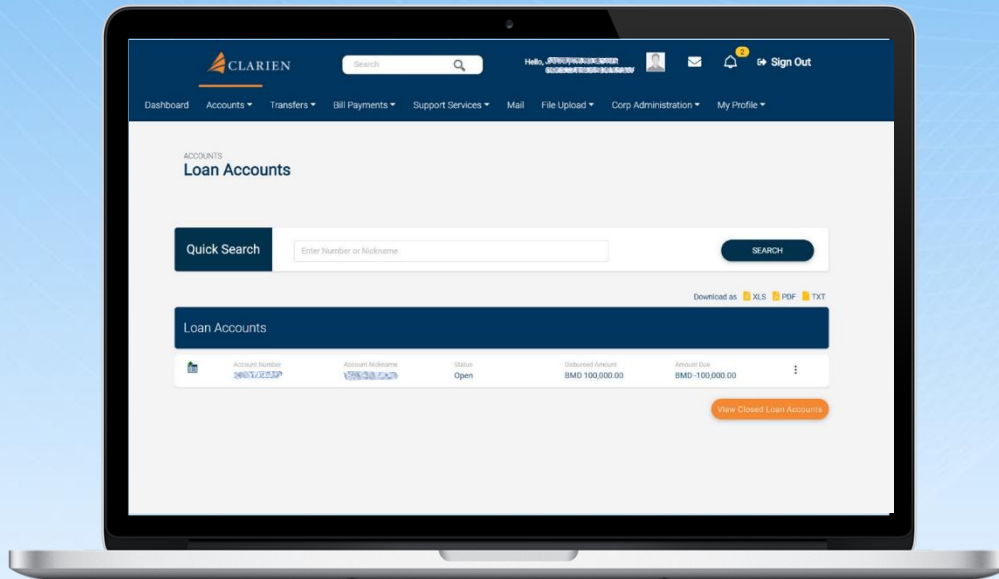


Above your accounts list, you may select the Download function to download your list of accounts. Simply select your preferred file type.

From your loan accounts list, you will see the Account Number, Account Nickname, Status the Disbursed Amount and Amount Due.

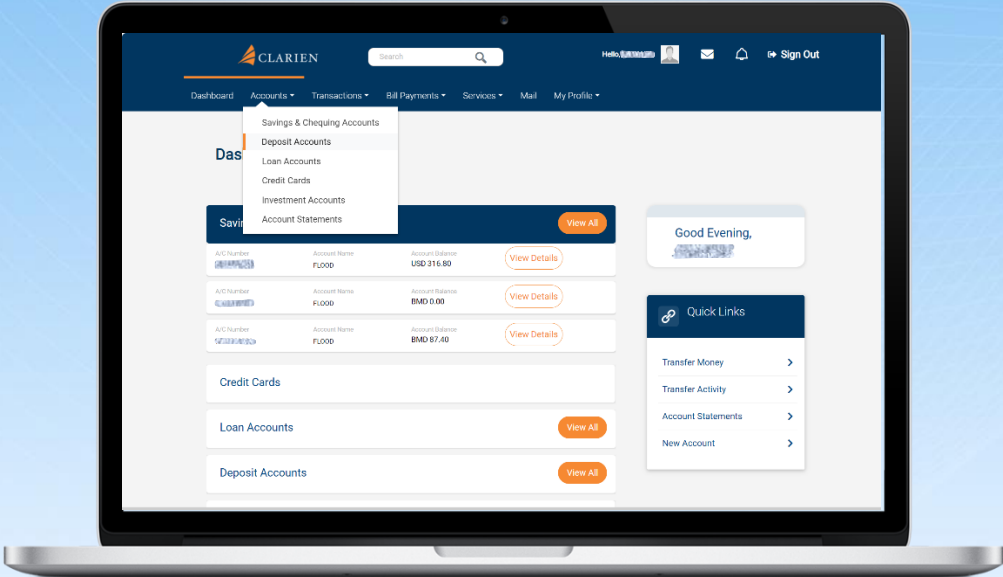


*Click on the account number to view the account details.*

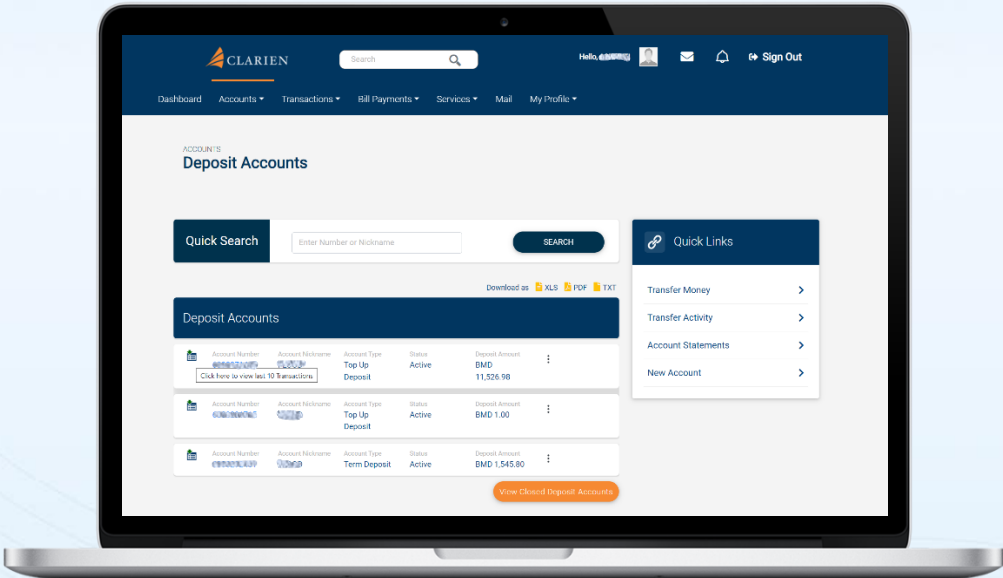


*You will also see the More Actions menu, which are the 3 dots to the right of each account on your list. Click on the dots for additional account actions. You may view your transaction history, amortization schedule, repayment schedule, or your disbursement schedule.*

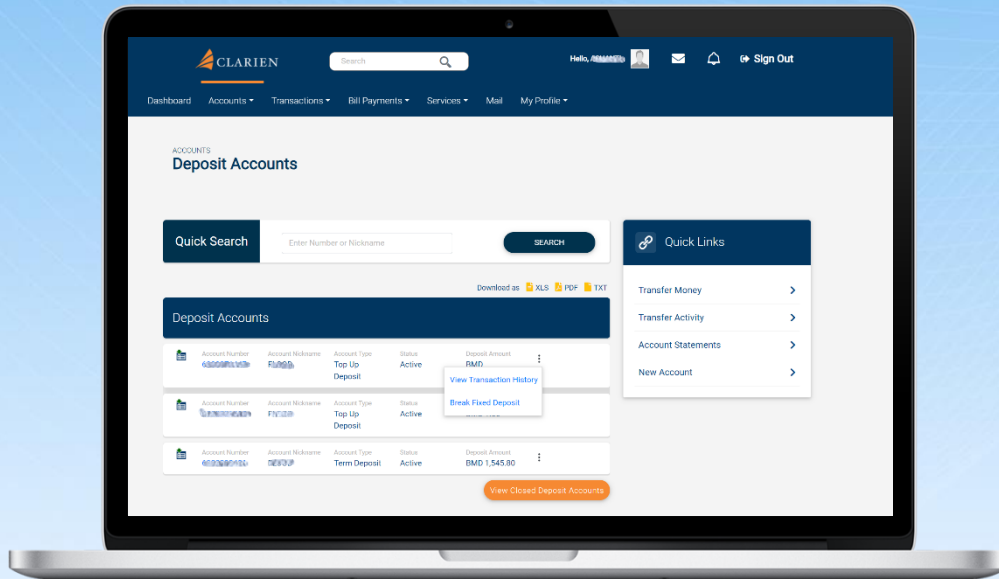
DEPOSIT ACCOUNTS



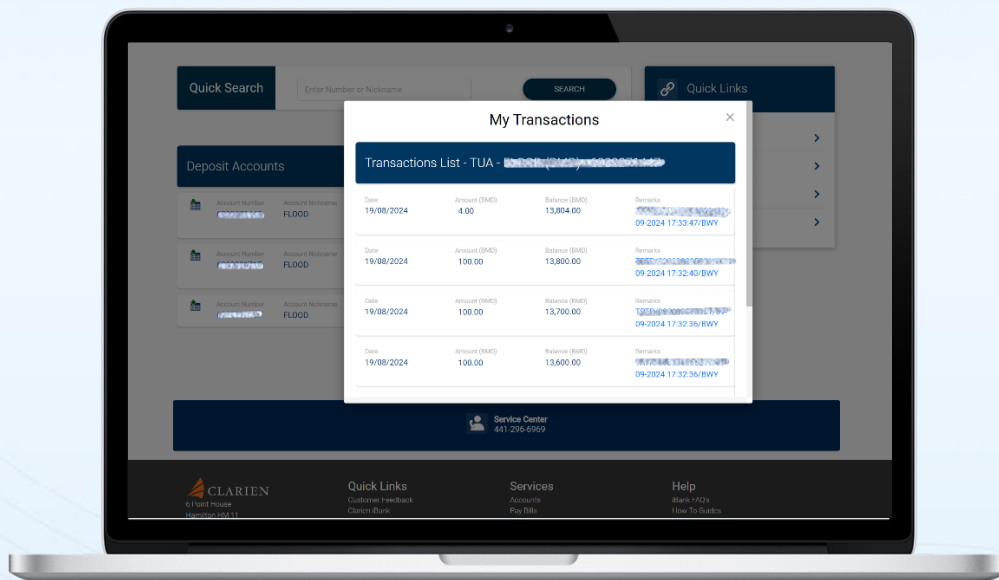
Select Deposit Accounts from the Accounts menu.



Use the icon left of each account to view the last 10 transactions.



Use the More Actions menu to View Transaction History or Break a Fixed Deposit.



When View Transaction History is selected, the Transactions list will display.

Step 1 of 3 - Break Fixed Deposit

**ACCOUNT DETAILS**

DEPOSIT ACCOUNT\*  
[Dropdown menu showing account details]  
[View Details](#)

**BREAKING DETAILS**

AMOUNT TO BE BROKEN\*

100

BREAKING VALUE DATE (DD/MM/YYYY)\*  
30/06/2024

TRANSFER PROCEEDS TO\*

Account  
[Dropdown menu showing account details]

TRANSACTION REMARKS  
[Text area]

NOTE: BASED ON THE PROCESSING DATE ADDITIONAL CHARGES WILL BE APPLICABLE.  
\*\* REFER TO FEE SHEET FOR APPLICABLE CHARGES \*\*

☒ I agree to the following [Terms and Conditions](#)

[Back](#) [Submit Online](#)

**Quick Links**

- [Transfer Money](#)
- [Transfer Activity](#)
- [Account Statements](#)
- [New Account](#)

When Break Fixed Deposit is selected, choose the Deposit account and amount to be broken.

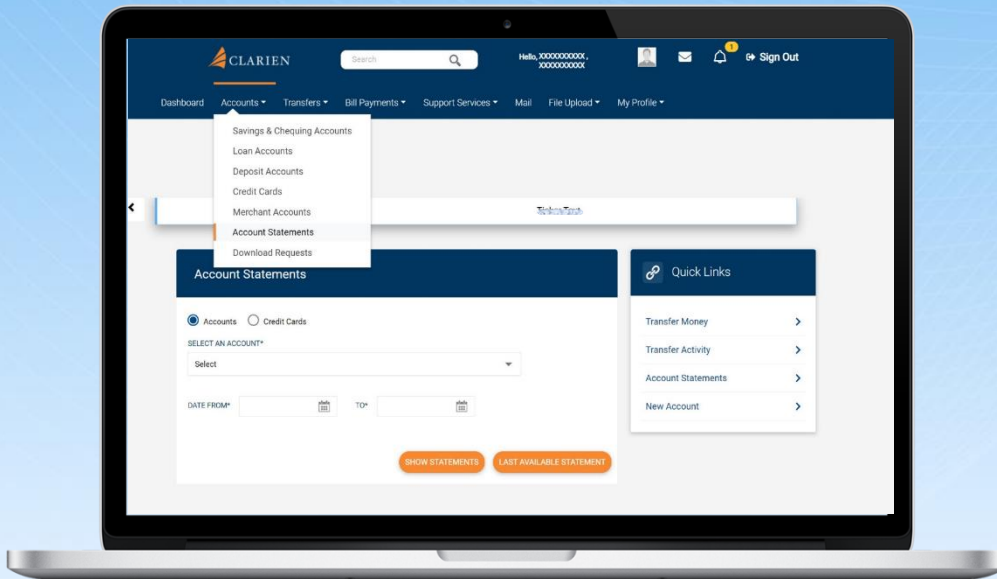
Then, enter the breaking value date and select the account that the proceeds should be transferred to.

Agree to the Terms by ticking the box. Once complete, select the Submit Online button.

## ACCOUNT STATEMENTS

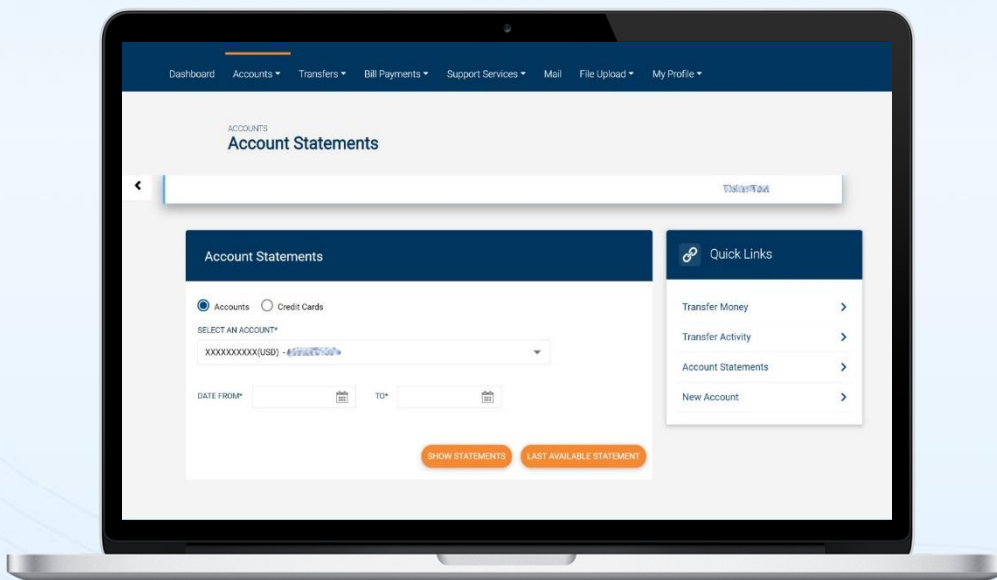
Select Account Statement from your Accounts menu.

Choose Banking or Credit Card accounts, then choose your account from the drop-down menu.



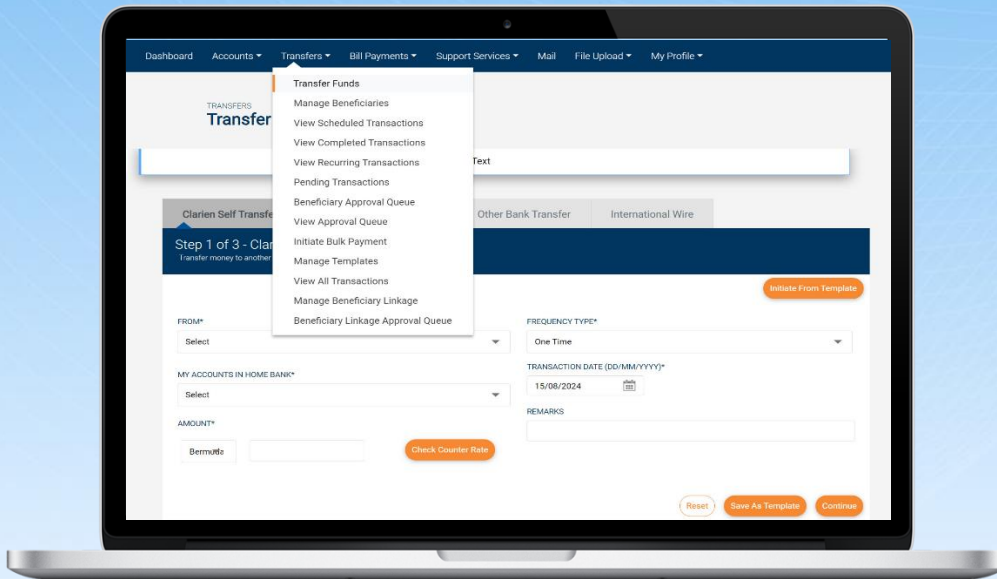
Enter your date range and select either Show Statements or View Last Available Statement.

Quick Links are available in the right menu, allowing you to transfer money, view transfer activity and account statements or open an account.

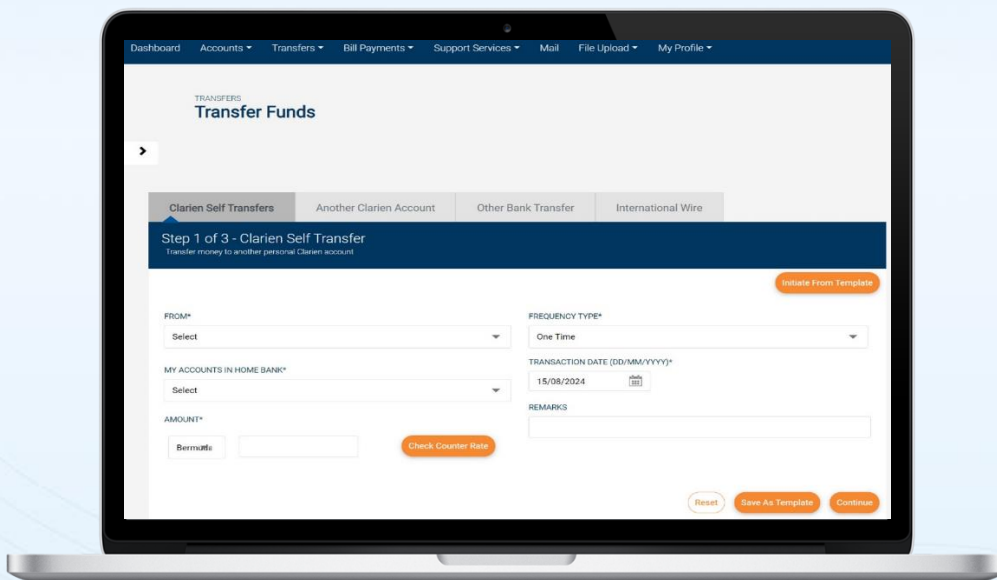


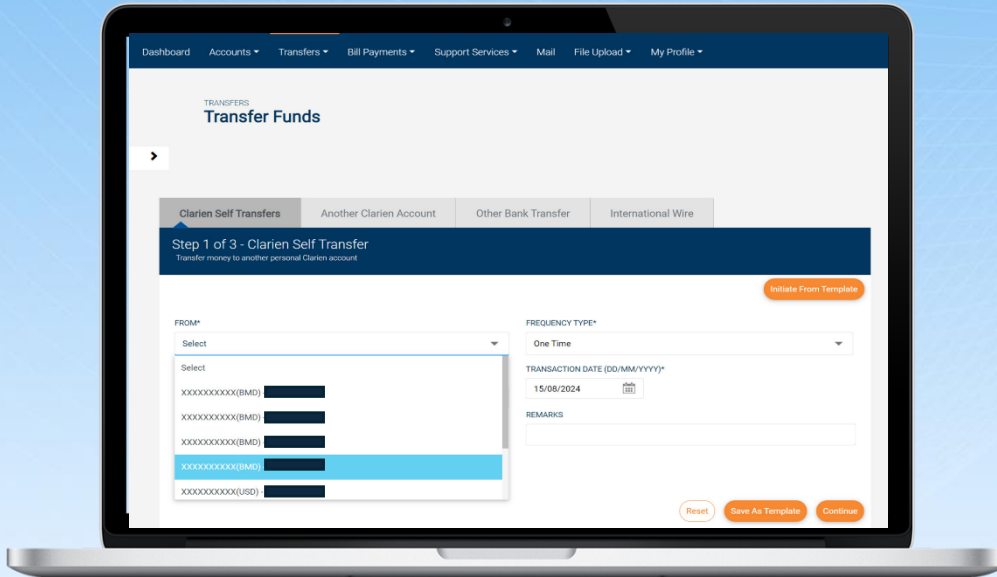
## TRANSFER TO OWN ACCOUNT

To make a transfer to your own account, select Transfer Funds from the Transfers menu.

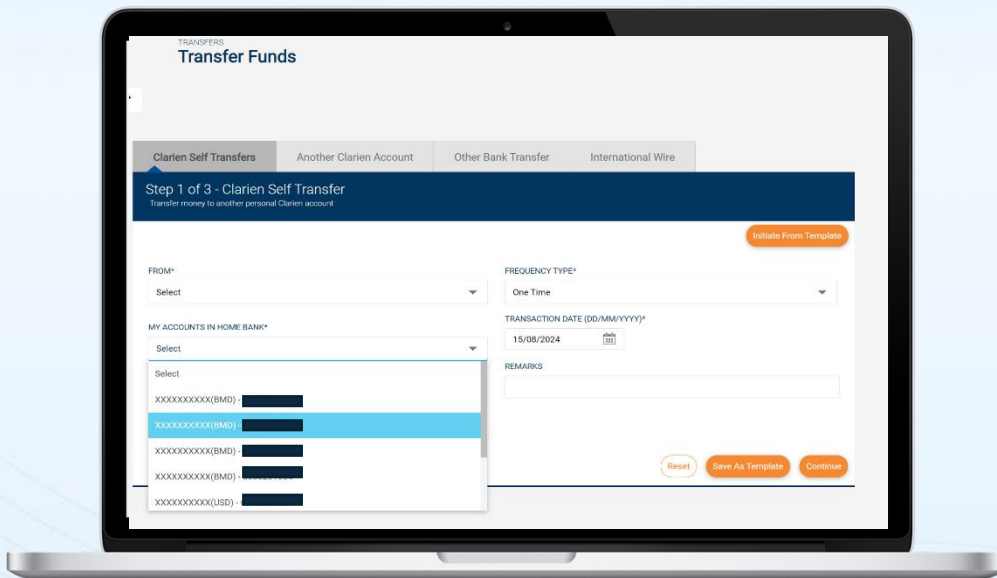


Click on the Clarien Self Transfers Tab.





Select the account that you want to transfer from.



Then, select the account you are transferring to from the My Accounts drop down list.

Select your currency and enter the amount.

Then, select your Frequency type – either One Time or Recurring.

If One Time, proceed by selecting the Transaction Date and entering Remarks regarding the transaction.

Initiate From Template

FROM\*  
RAMESH KUM(USD)

Available Balance : USD 2,313.00

MY ACCOUNTS IN HOME BANK\*  
XXXXXXXXXX(BMD)

AMOUNT\*  
Bermuda 100

Check Counter Rate

FREQUENCY TYPE\*  
Recurring

FREQUENCY  
Daily

START DATE (DD/MM/YYYY)\*  
14/06/2024

Please Enter :  
NUMBER OF INSTALLMENTS  
12

OR  
END DATE (DD/MM/YYYY)  
14/06/2025

REMARKS  
test

Reset Save As Template Continue

If this is a Recurring Transaction, select the frequency of the transaction, the Start Date, the Number of Installments or an End Date.

Save your entry as a Template or simply Continue.

Once complete, you may save this entry as a template or select continue to initiate the transfer.

TRANSFERS  
Transfer Funds

Add Templates - Self Transfer  
Fill in all required fields (\*)

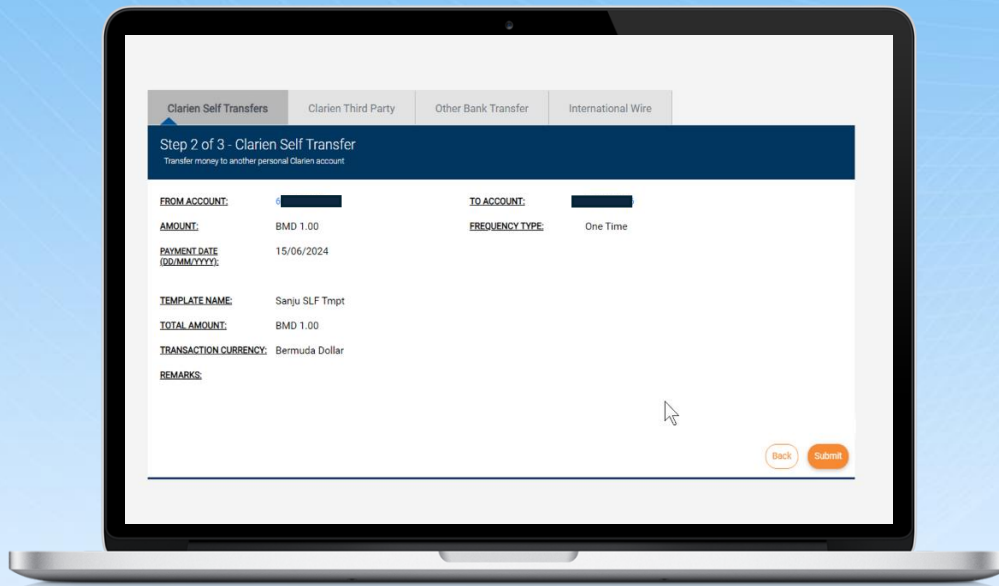
Template Details

Template Name\* sanju SLF tmpt

Transaction Type: Clarlen Self Transfer

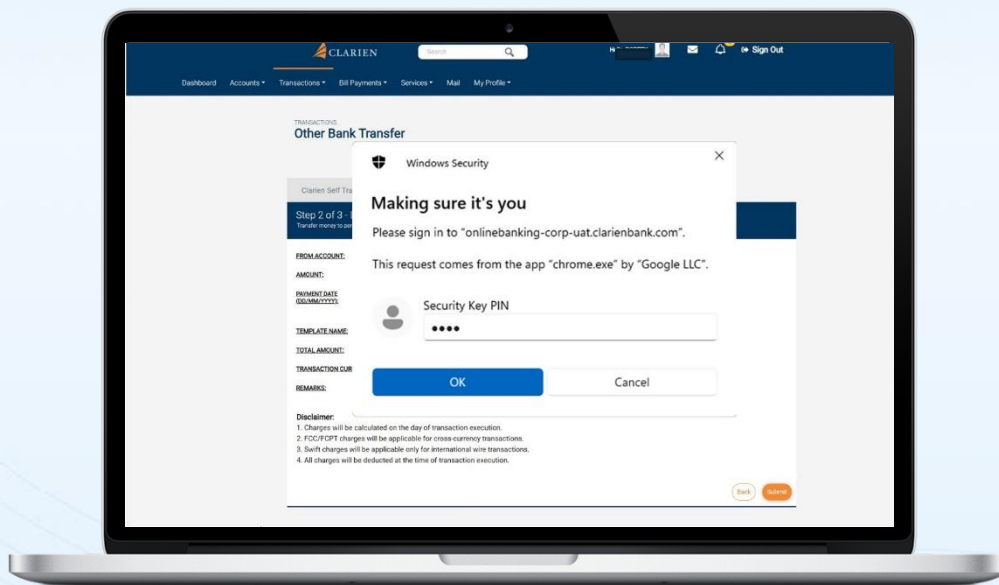
Back Continue

If you select Save As Template, enter the Template Name, then select Continue.



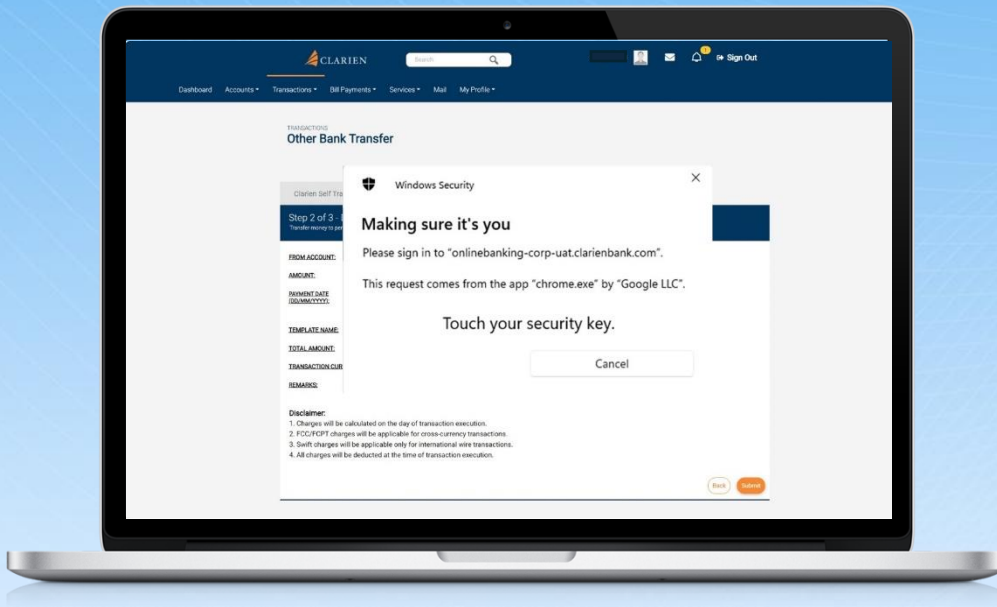
The next step is to review your transaction details. If you need to make any changes, select the Edit button, then make your changes.

If everything is correct, select Submit.

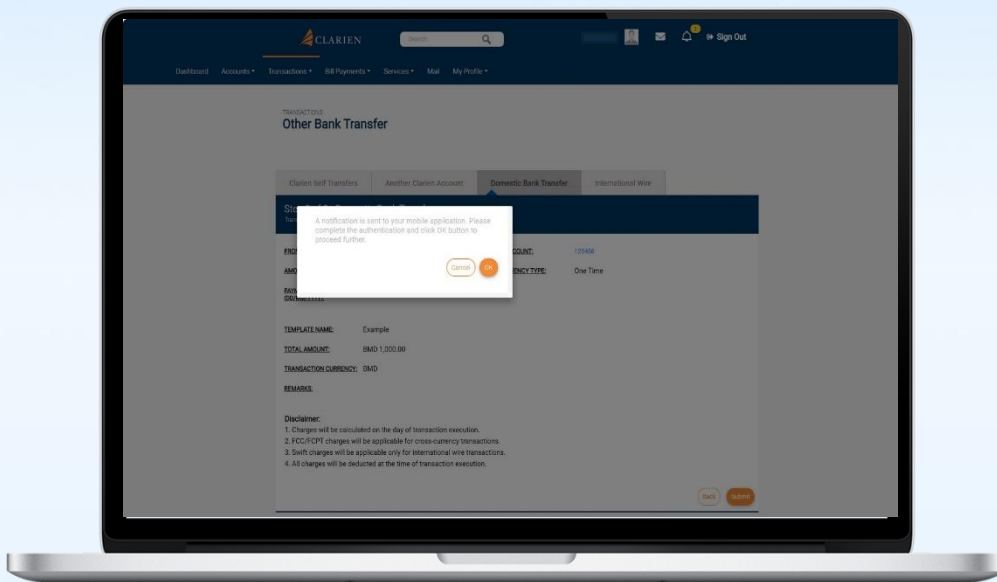


An authentication notification will display on the screen.

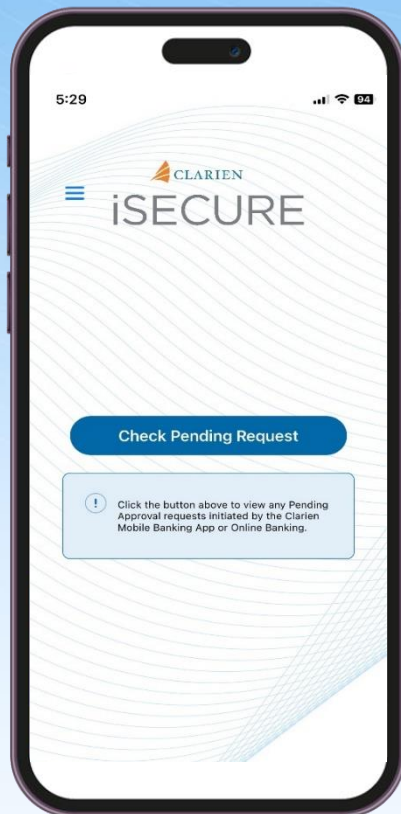
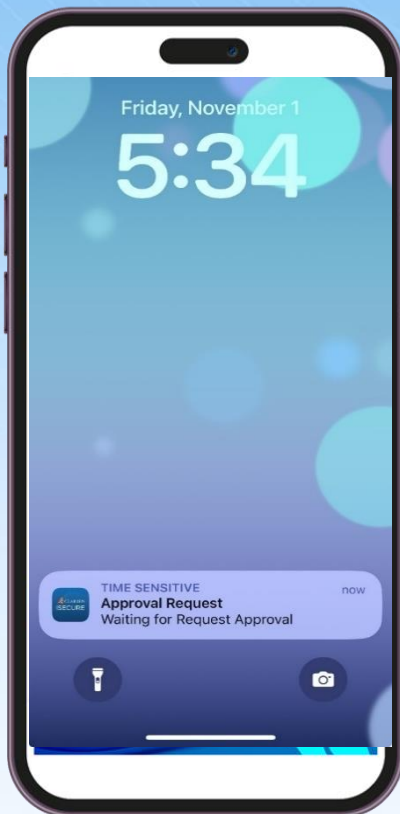
If you are using the Clarien Security Key USB Hard Token, please be sure your device is inserted into a USB port. Enter your Security Key PIN, then select OK.



You will then be prompted to touch your security key. Simply touch the edge of the device with the tip of your finger.

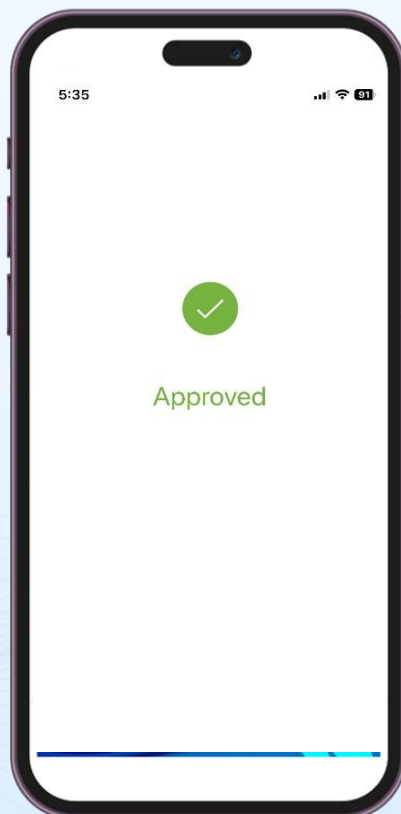
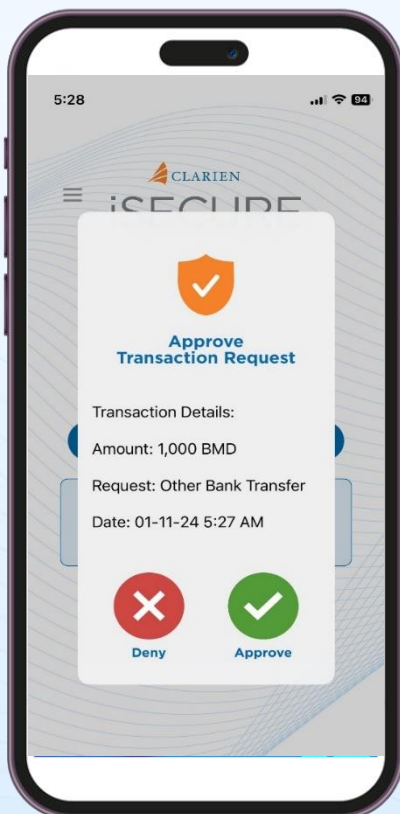


If you are using the iSecure soft token authenticator, your notification will advise you to check your mobile app.



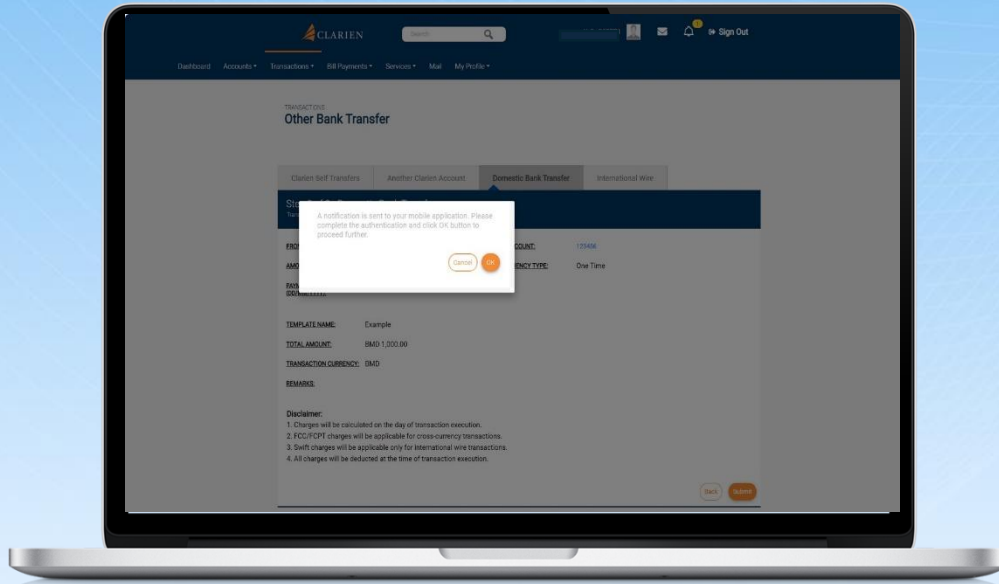
Click on the iSecure notification on your mobile device screen, which will open the iSecure app.

Then, click on the Check Pending Request button.

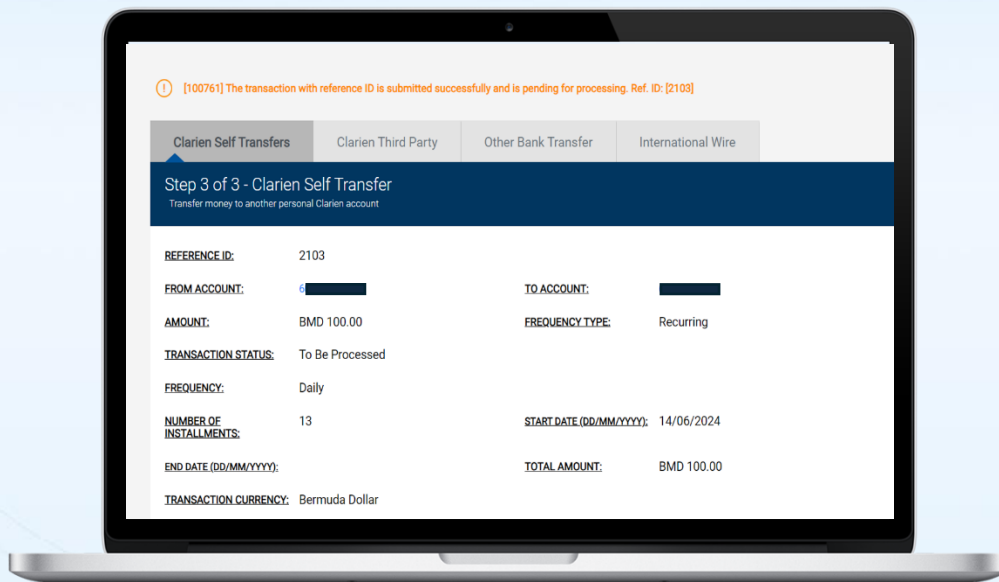


Review the Transaction Request details. If correct, select Approve.

iSecure will confirm your approval.



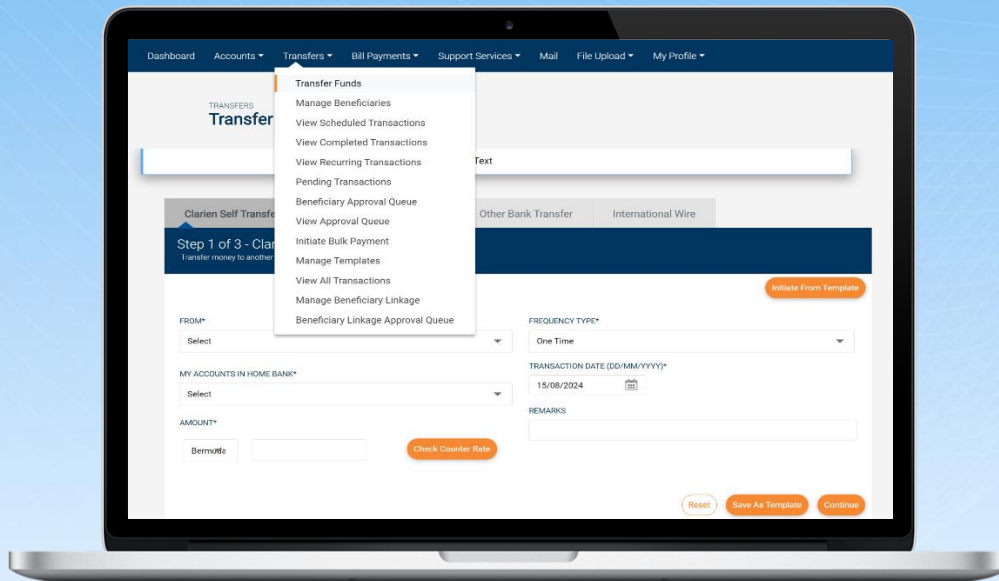
Return to your laptop or desktop and select OK to proceed.



You are now able to view and download your transfer details.

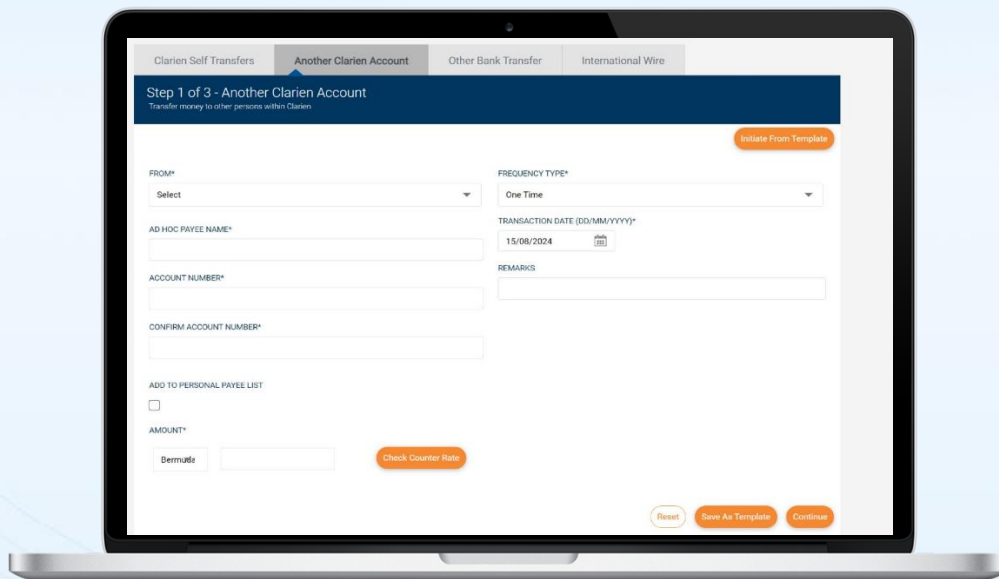
## TRANSFER TO ANOTHER CLARIEN ACCOUNT

To transfer funds to another account at Clarien Bank, select Transfer Funds from the Transfers menu.



Click on the Another Clarien Account tab.

Select the account that you want to transfer from. Then, enter the Ad Hoc Payee Name, and Account Number. Confirm the Account Number. Tick the box to add this Payee to your Personal Payee List.



Clarien Self Transfers | **Another Clarien Account** | Other Bank Transfer | International Wire

**Step 1 of 3 - Another Clarien Account**  
Transfer money to other persons within Clarien

Initiate From Template

FROM\*  
Select

FREQUENCY TYPE\*  
One Time

AD HOC PAYEE NAME\*

TRANSACTION DATE (DD/MM/YYYY)\*  
15/08/2024

ACCOUNT NUMBER\*

CONFIRM ACCOUNT NUMBER\*

REMARKS

ADD TO PERSONAL PAYEE LIST  
☐

AMOUNT\*  
Bermuda

Check Counter Rate

Reset Save As Template Continue

Select the Currency and enter the Amount.

Then, select your Frequency type. If this is a One Time transaction, enter your Transaction Date. You may also enter remarks.

Once complete, you may save this entry as a template or select continue to initiate the transfer.

Initiate From Template

FROM\*  
RAMESH KUM(USD)

Available Balance : USD 2,313.00

MY ACCOUNTS IN HOME BANK\*  
XXXXXXXXXX(BMD)

AMOUNT\*  
Bermuda 100

Check Counter Rate

FREQUENCY TYPE\*  
Recurring

FREQUENCY  
Daily

START DATE (DD/MM/YYYY)\*  
14/06/2024

Please Enter :  
NUMBER OF INSTALLMENTS  
12

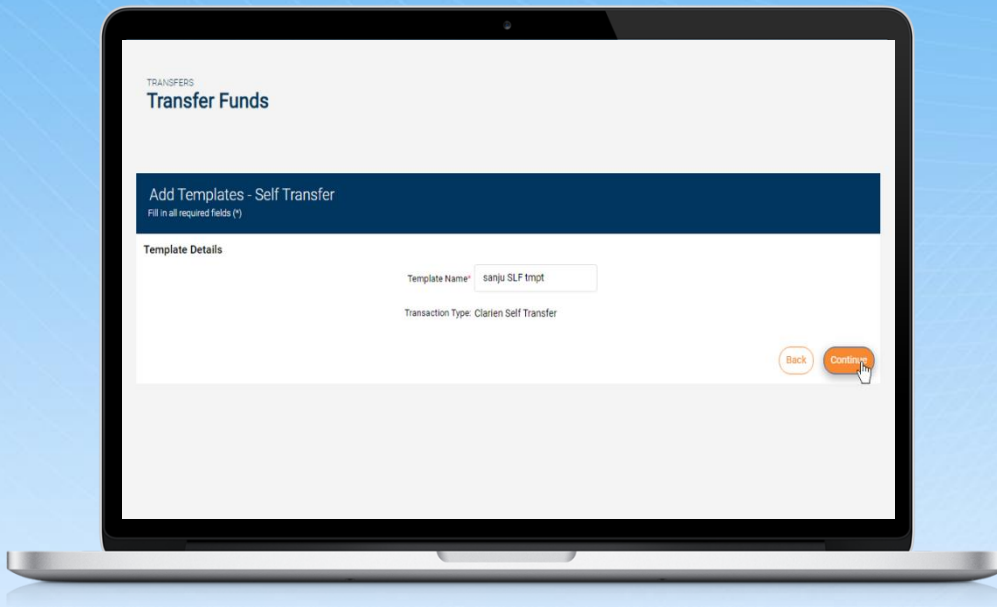
OR  
END DATE (DD/MM/YYYY)  
14/06/2025

REMARKS  
test

Reset Save As Template Continue

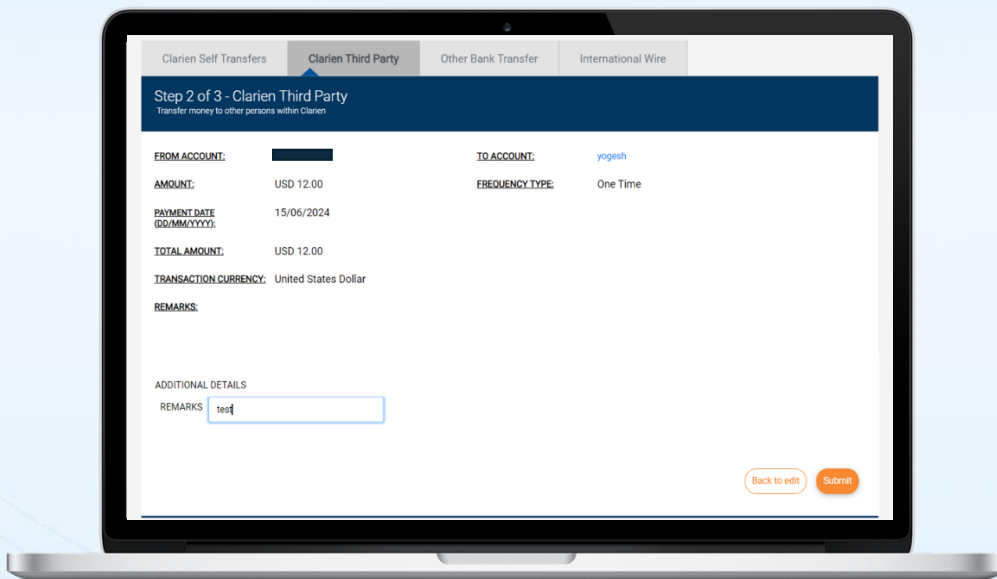
If this is a Recurring Transaction, select the frequency of the transaction, the Start Date, the Number of Installments or an End Date.

Save your entry as a Template or simply Continue.

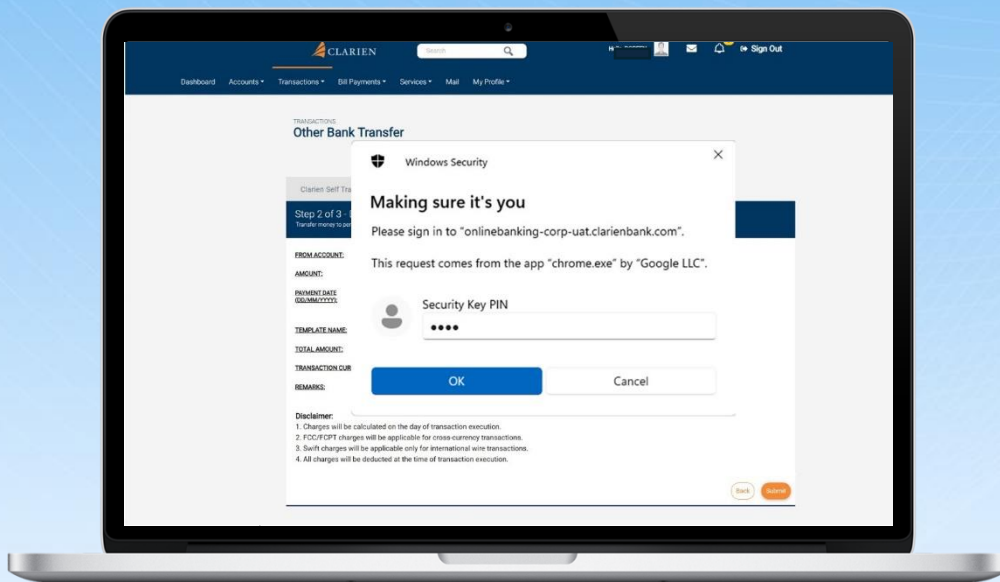


If you select Save As Template, enter the Template Name, then select Continue.

The next step is to review your transaction details. If you need to make any changes, select the Edit button, then make your changes.

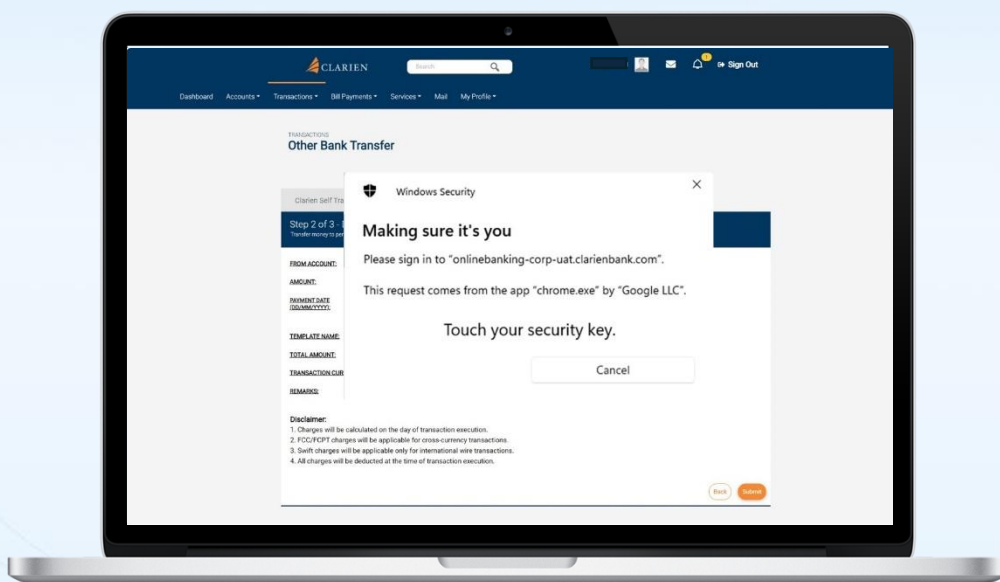


The next step is to review your transaction details. If you need to make any changes, select the Edit button, then make your changes.

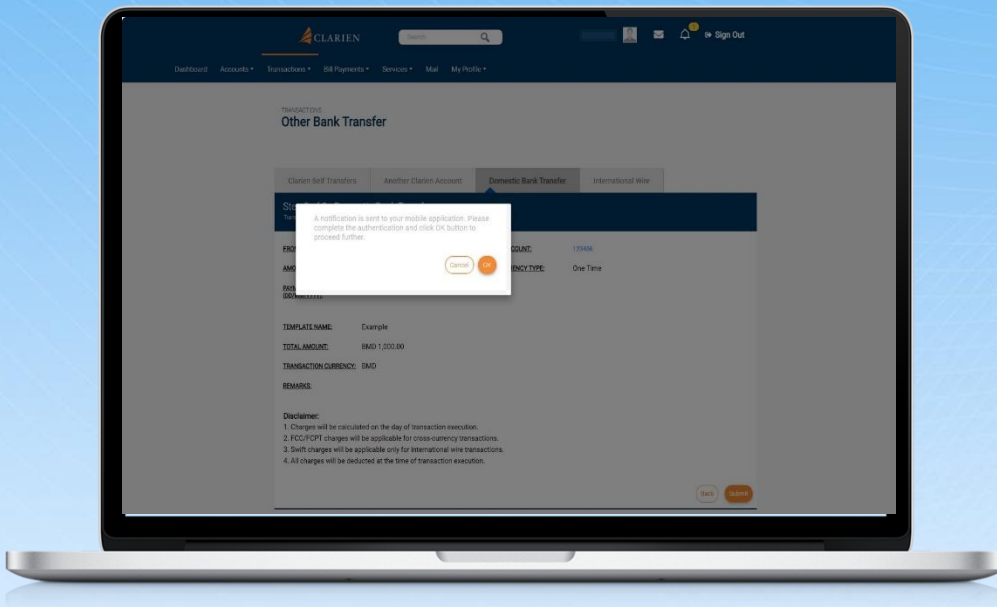


An authentication notification will display on the screen.

If you are using the Clarien Security Key USB Hard Token, please be sure your device is inserted into a USB port. Enter your Security Key PIN, then select OK.



You will then be prompted to touch your security key. Simply touch the edge of the device with the tip of your finger.

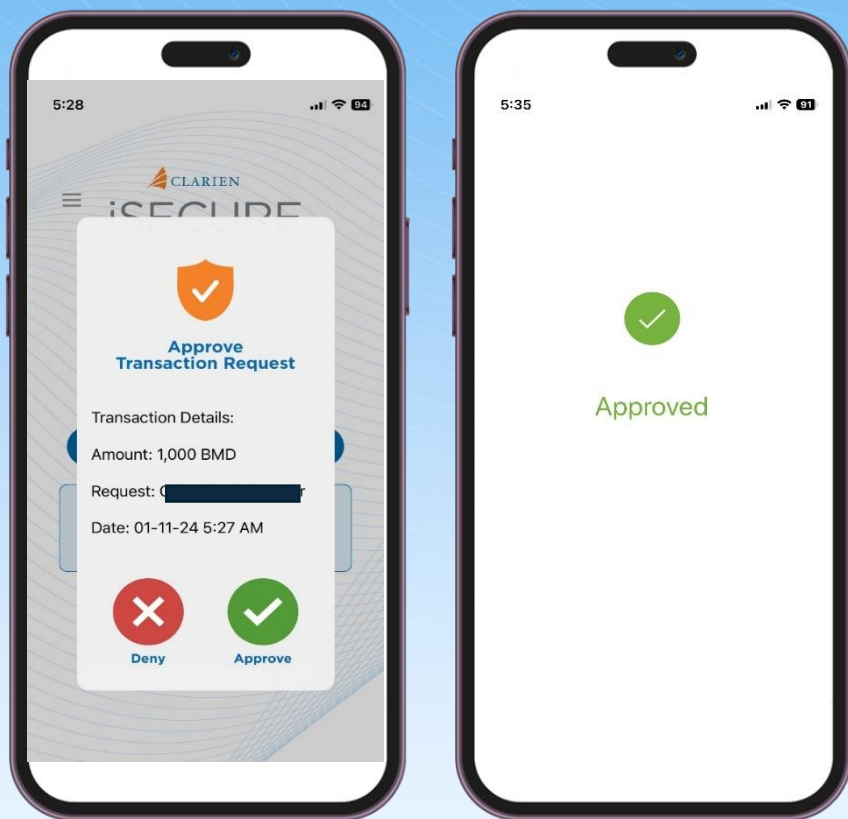


If you are using the iSecure soft token authenticator, your notification will advise you to check your mobile app.



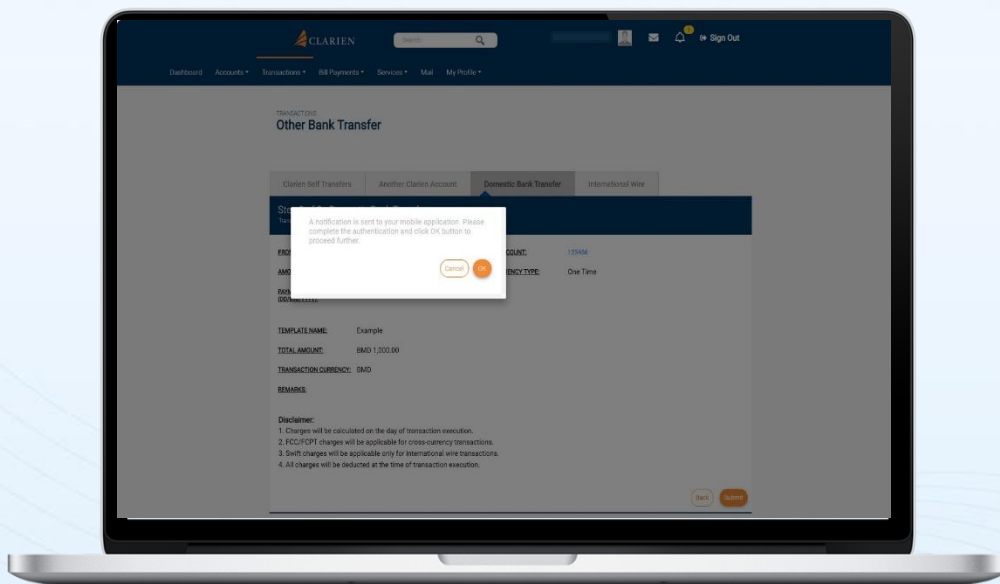
Click on the iSecure notification on your mobile device screen, which will open the iSecure app.

Then, click on the Check Pending Request button.



Review the Transaction Request details. If correct, select Approve.

iSecure will confirm your approval.



Return to your laptop or desktop and select OK to proceed.

Clarien Self Transfers

Clarien Third Party

Other Bank Transfer

International Wire

Step 3 of 3 - Clarien Third Party

Transfer money to other persons within Clarien

REFERENCE ID:

2125

FROM ACCOUNT:

TO ACCOUNT:

AMOUNT:

USD 12.00

FREQUENCY TYPE:

One Time

PAYMENT DATE  
(DD/MM/YYYY):

15/06/2024

TRANSACTION STATUS:

To Be Processed

TOTAL AMOUNT:

USD 12.00

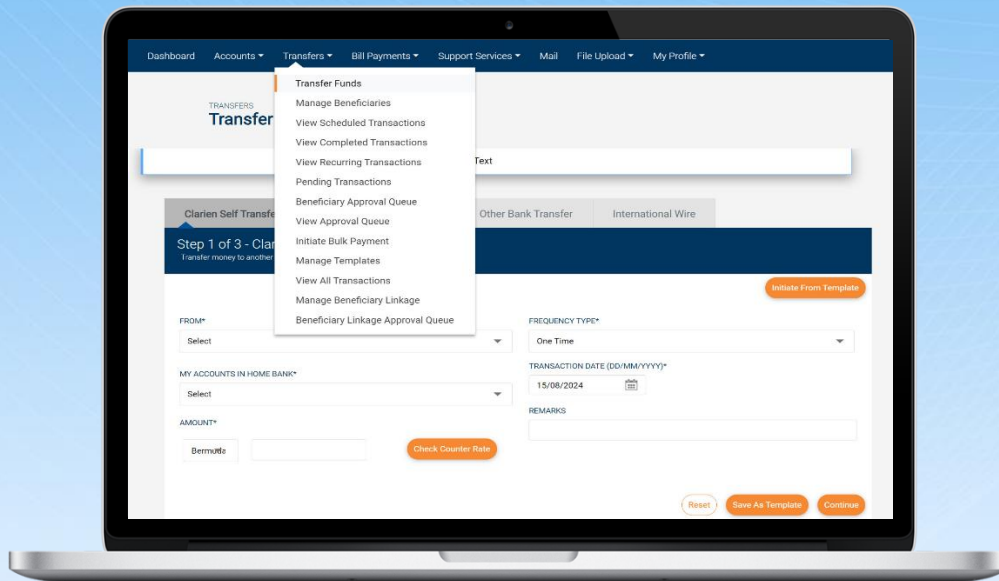
TRANSACTION CURRENCY:

United States Dollar

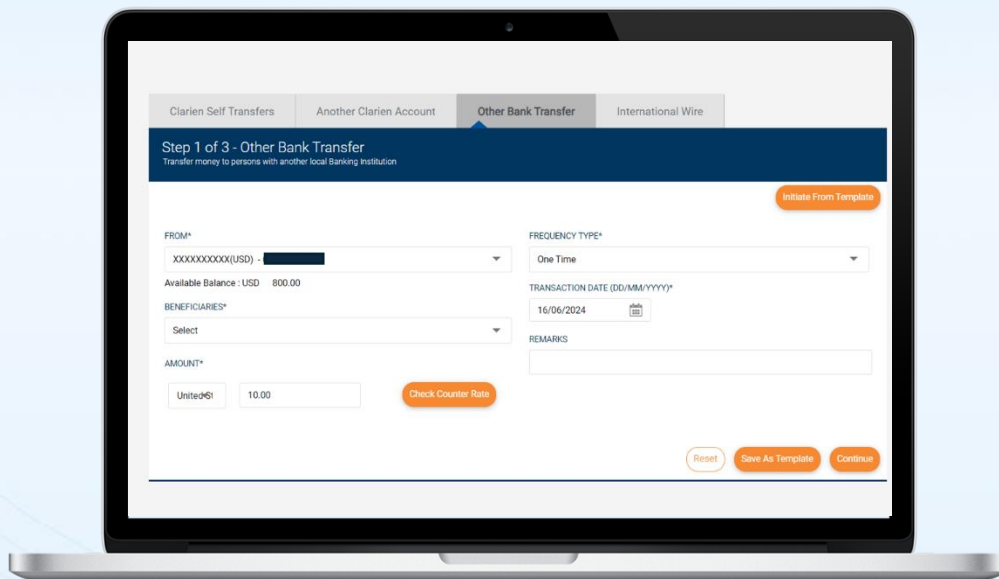
REMARKS:

If everything is correct, select Submit. You will then be able to view and download your transfer details.

## TRANSFER TO DOMESTIC BANK



To transfer funds to Domestic Bank, select Transfer Funds from the Transfers menu.



Select the account that you want to transfer from. Then, select the Beneficiary. Select the Currency and enter the transfer Amount.

Then, select the Frequency Type (One Time or Recurring). If this is a One Time transaction, proceed by choosing the Transaction Date and entering any remarks.

Save your entry as a Template or simply Continue.

Clarien Self Transfers   Another Clarien Account   **Other Bank Transfer**   International Wire

**Step 1 of 3 - Other Bank Transfer**  
Transfer money to persons with another local Banking Institution

Initiate From Template

FROM\*  
RAMESH KUM(USD) - [dropdown]

Available Balance : USD   2,313.00

BENEFICIARIES\*  
[dropdown] 345667

AMOUNT\*  
United\$1   10   Check Counter Rate

FREQUENCY TYPE\*  
Recurring

FREQUENCY  
Daily

START DATE (DD/MM/YYYY)\*  
18/06/2024

Please Enter :  
NUMBER OF INSTALLMENTS  
12

OR  
END DATE (DD/MM/YYYY)  
[dropdown]

If this is a Recurring transaction, selecting the frequency of the transaction, the Start Date, the Number of Installments or an End Date.

Save your entry as a Template or simply Continue.

TRANSFERS  
**Transfer Funds**

**Add Templates - Self Transfer**  
Fill in all required fields (\*)

Template Details

Template Name\*   sanju SLF tmpt

Transaction Type: Clarien Self Transfer

Back   Continue

If you selected Save As Template, enter the Template Name, then select Continue.

Clarien Self Transfers   Clarien Third Party   **Other Bank Transfer**   International Wire

### Step 2 of 3 - Other Bank Transfer

Transfer money to persons with another local Banking Institution

FROM ACCOUNT: [REDACTED]   TO ACCOUNT: [REDACTED]

AMOUNT: BMD 30.00   FREQUENCY TYPE: Recurring

FREQUENCY: Daily

NUMBER OF INSTALLMENTS: 12   START DATE (DD/MM/YYYY): 19/06/2024

END DATE (DD/MM/YYYY):   TOTAL AMOUNT: BMD 30.00

TRANSACTION CURRENCY: Bermuda Dollar

REMARKS:

APPROVER DETAILS

| Rule ID | Authority          | Follow Hierarchy |
|---------|--------------------|------------------|
| 1       | 2 GROUPA + 2 GROUP | No               |
| 1       | 2 GROUPA + 2 GROUP | No               |

Select Approver

APPROVER USER ID [REDACTED] Lookup

APPROVER USER ID [REDACTED] Lookup

APPROVER USER ID [REDACTED] Lookup

The next step is to review your transaction details.

Your Approver Details are also below. Please review and make any necessary changes, then Submit.

CLARIEN

Dashboard   Accounts   Transactions   Bill Payments   Services   Mail   My Profile   Sign Out

### Other Bank Transfer

Clarien Self Tra

Step 2 of 3 - Transfer money to an

FROM ACCOUNT: [REDACTED]

AMOUNT: [REDACTED]

REMARKS DATE (DD/MM/YYYY): [REDACTED]

TEMPLATE NAME: [REDACTED]

TOTAL AMOUNT: [REDACTED]

TRANSACTION CUR: [REDACTED]

REMARKS: [REDACTED]

Disclaimer:

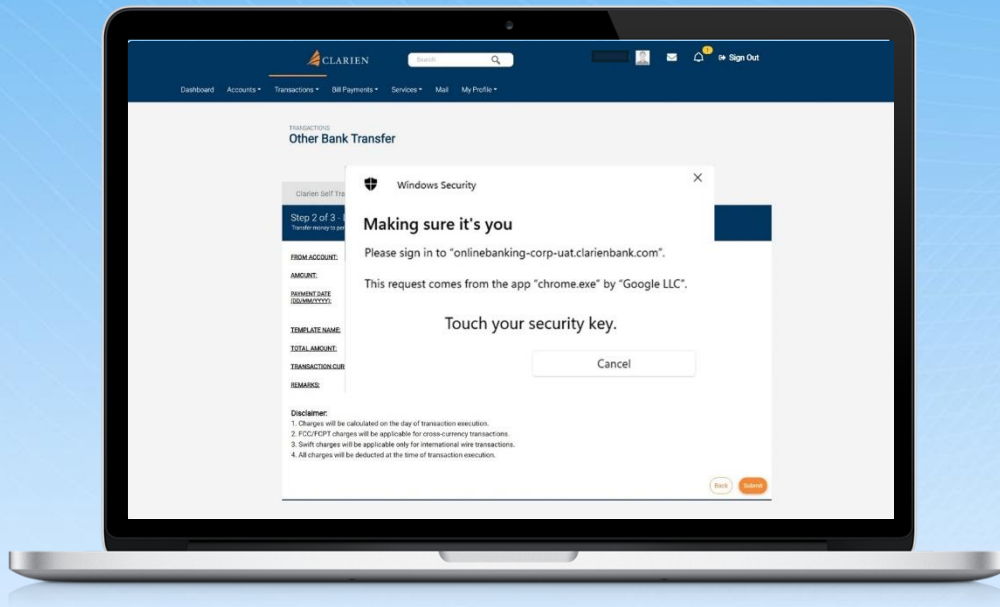
1. Charges will be calculated on the day of transaction execution.
2. FDC/FDT charges will be applicable for cross-currency transactions.
3. Swift charges will be applicable only for international wire transactions.
4. All charges will be deducted at the time of transaction execution.

OK   Cancel

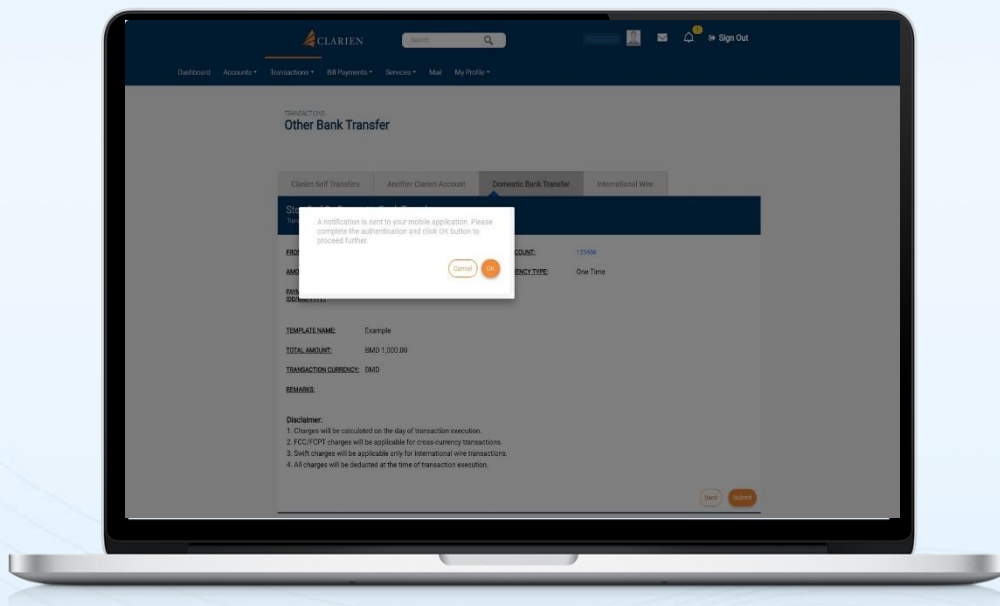
Submit

An authentication notification will display on the screen.

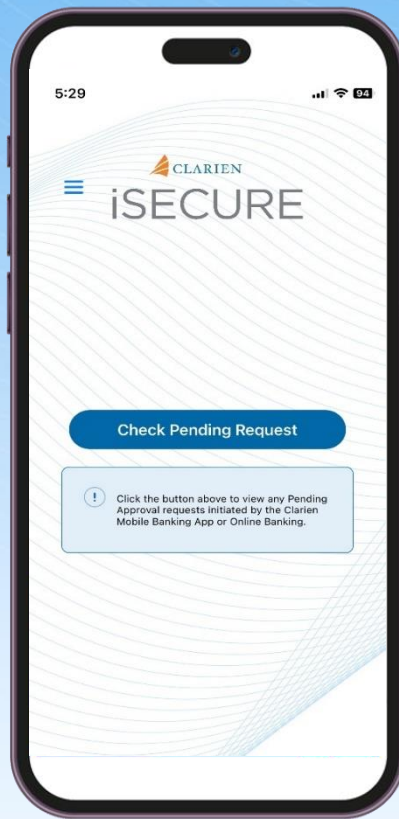
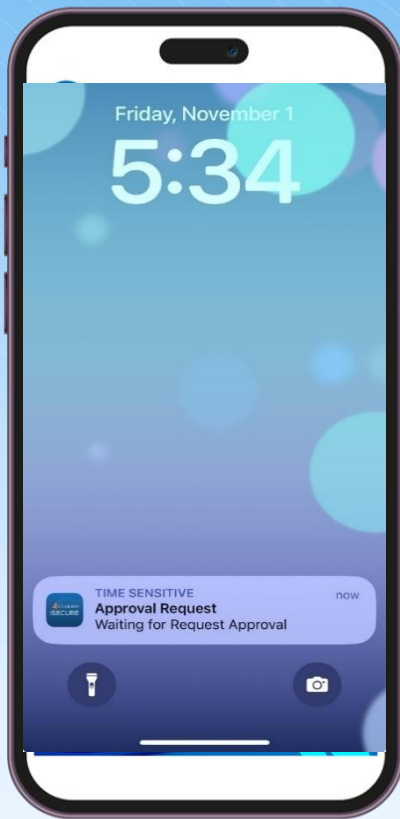
If you are using the Clarien Security Key USB Hard Token, please be sure your device is inserted into a USB port. Enter your Security Key PIN, then select OK.



You will then be prompted to touch your security key. Simply touch the edge of the device with the tip of your finger.

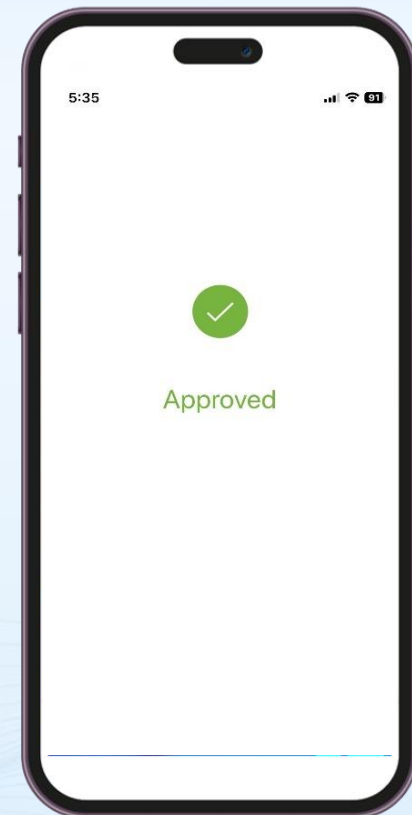
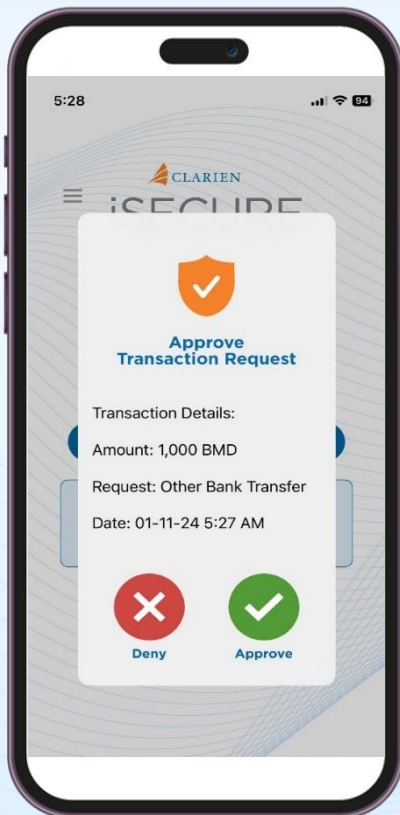


If you are using the iSecure soft token authenticator, your notification will advise you to check your mobile app.



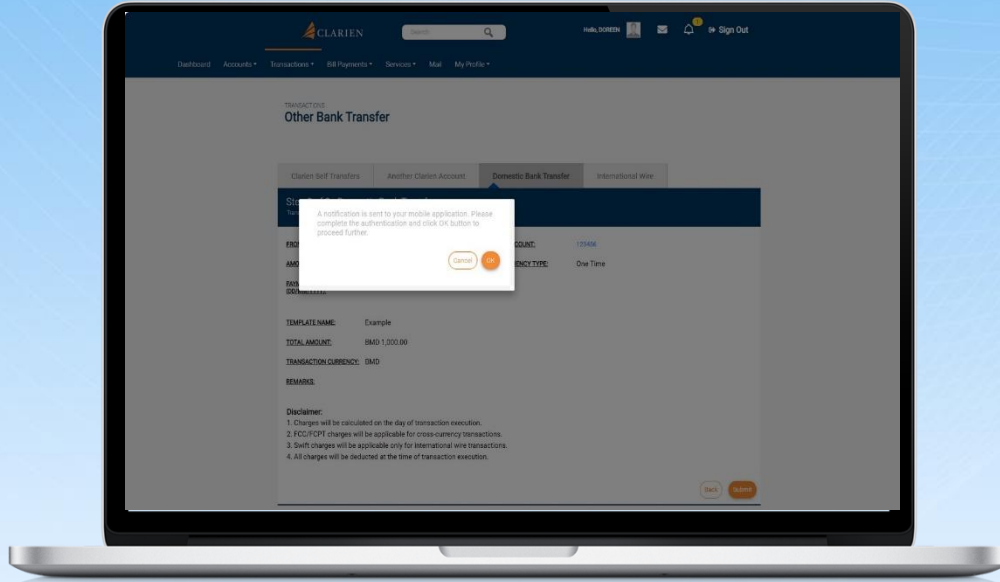
Click on the iSecure notification on your mobile device screen, which will open the iSecure app.

Then, click on the Check Pending Request button.

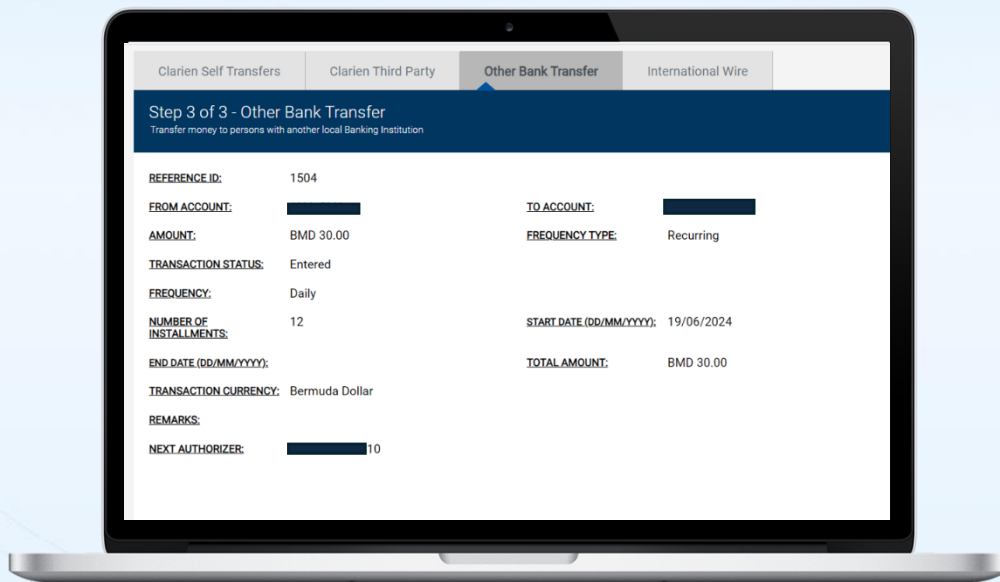


Review the Transaction Request details. If correct, select Approve.

iSecure will confirm your approval.



Return to your laptop or desktop and select OK to proceed.

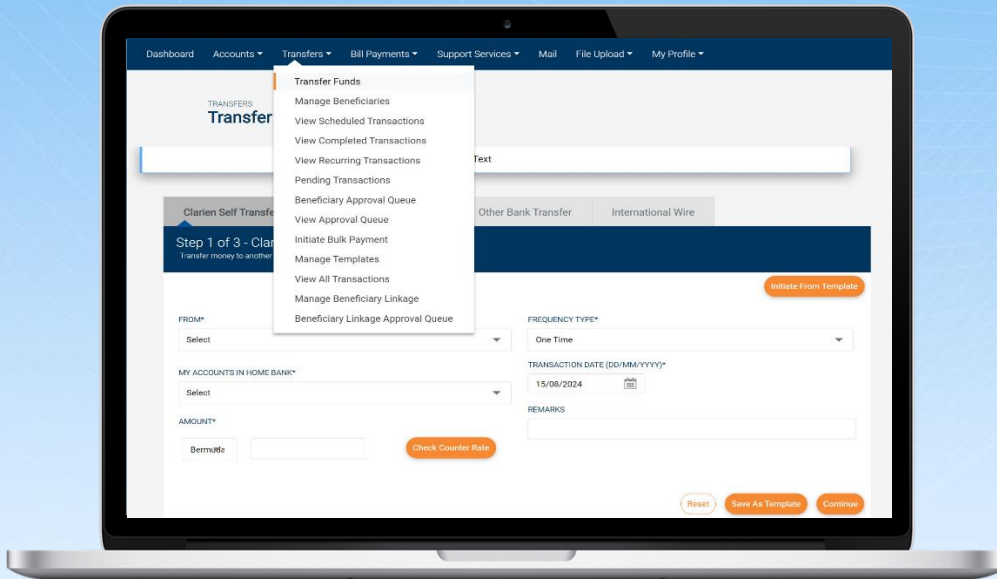


The final step is to review your transaction details

If everything is correct, select Submit.

## INTERNATIONAL WIRES

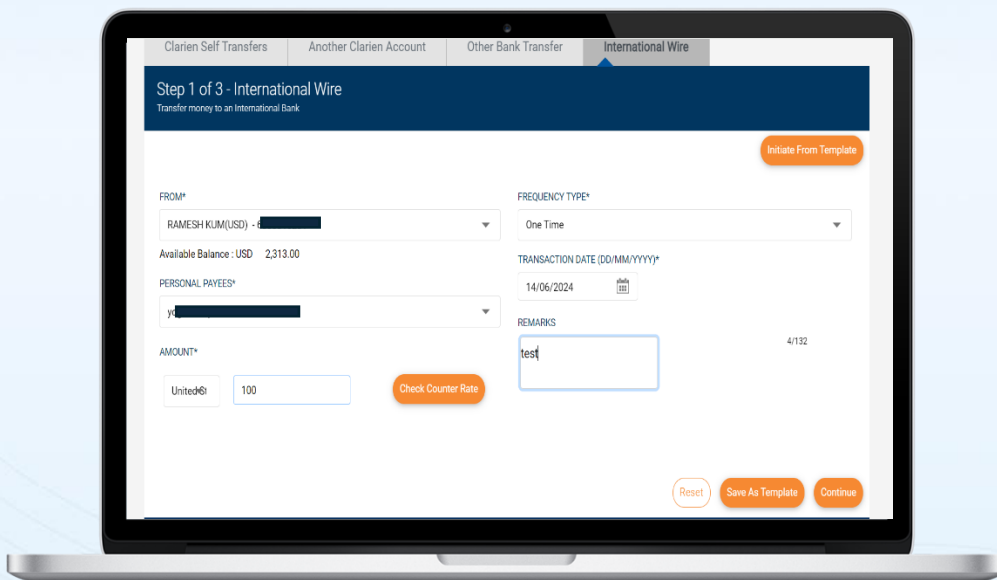
To send an **International Wire**, select Transfer Funds from the Transfers menu.



Select the account that you want to transfer from. Then, select the Personal Payee.

Select the Frequency Type (One Time or Recurring). If this is a One Time transaction, proceed by choosing the Transaction Date and entering any remarks.

Save your entry as a Template or simply Continue.



FROM\*

RAMESH KUM(USD) - [Redacted]

Available Balance : USD 2,313.00

MY ACCOUNTS IN HOME BANK\*

XXXXXXXX(BMD) - [Redacted]

AMOUNT\*

Bermuda 100

Check Counter Rate

Initiate From Template

FREQUENCY TYPE\*

Recurring

FREQUENCY

Daily

START DATE (DD/MM/YYYY)\*

14/06/2024

Please Enter :  
NUMBER OF INSTALLMENTS

12

OR  
END DATE (DD/MM/YYYY)

14/06/2025

REMARKS

test

Reset Save As Template Continue

If this is a Recurring transaction, selecting the frequency of the transaction, the Start Date, the Number of Installments or an End Date.

Save your entry as a Template or simply Continue.

TRANSFERS

## Transfer Funds

Add Templates - Self Transfer

Fill in all required fields (\*)

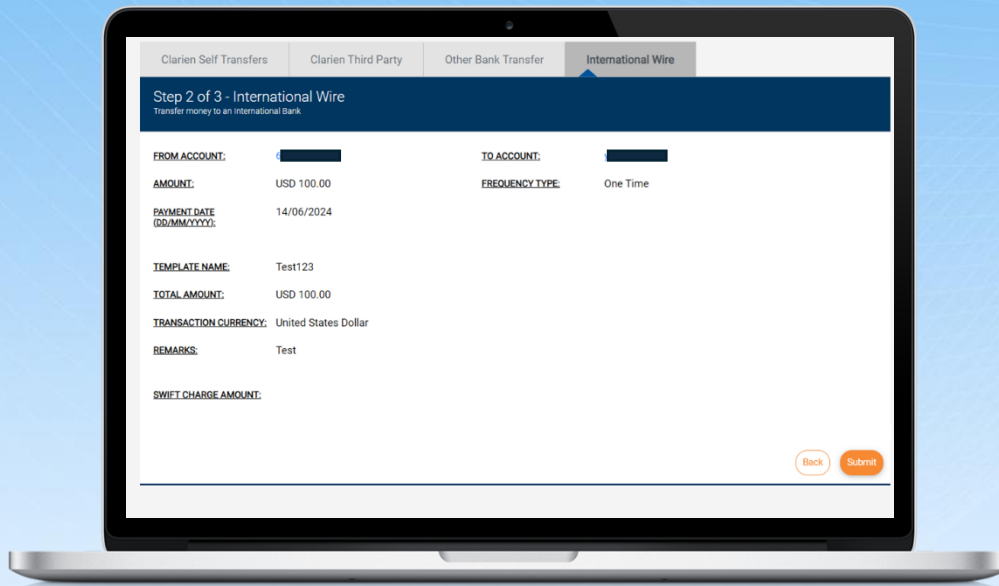
Template Details

Template Name: sanju SLF tmpt

Transaction Type: Clarlen Self Transfer

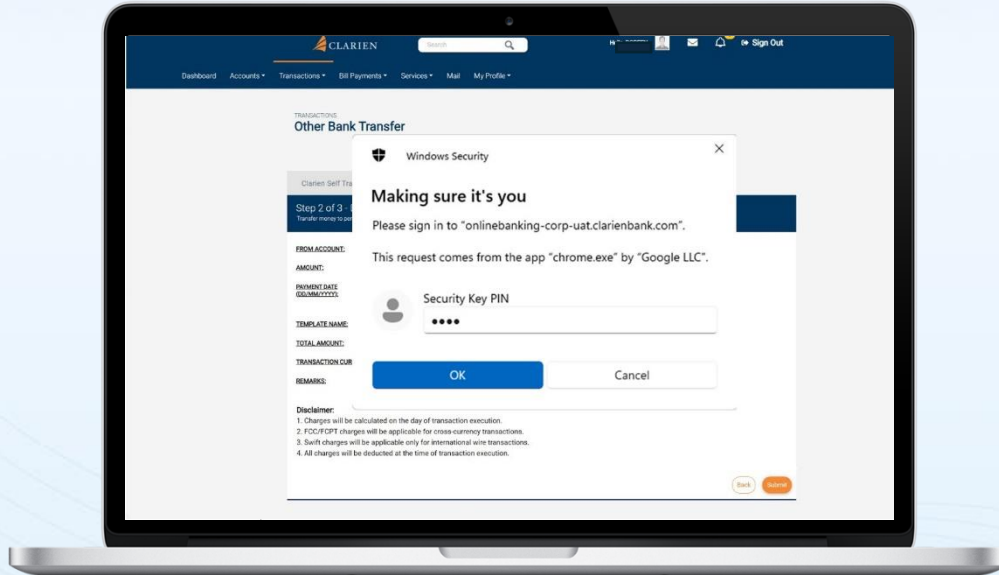
Back Continue

If you selected Save As Template, enter the Template Name, then select Continue.



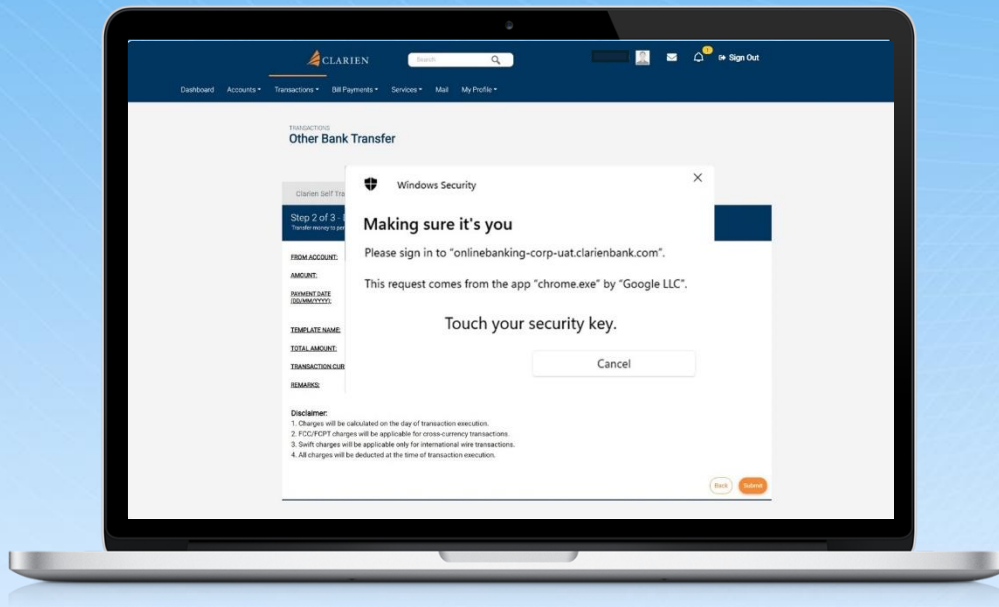
The next step is to review your transaction details.

Your Approver Details are also below. Please review and make any necessary changes, then Submit.

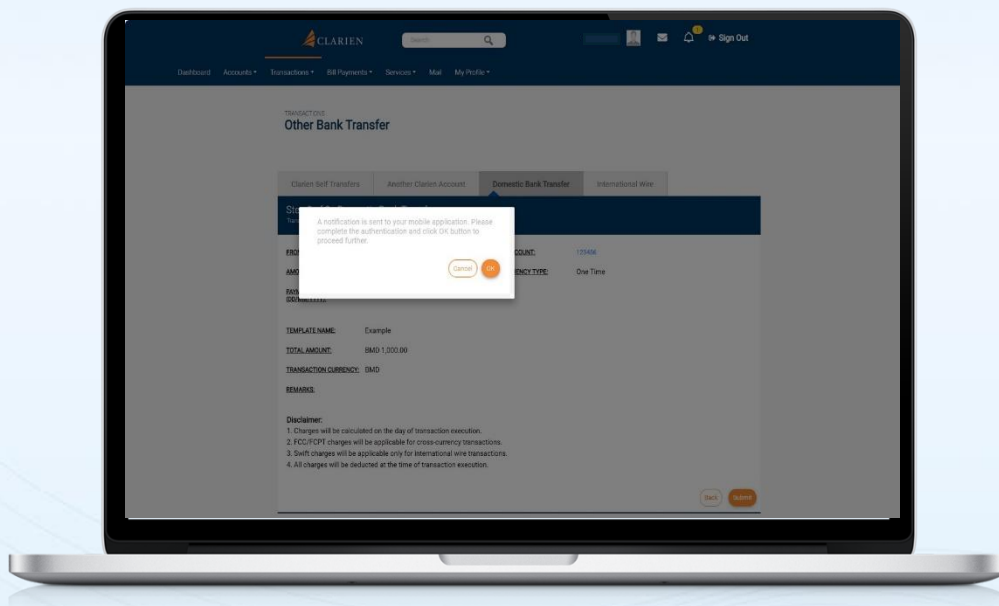


An authentication notification will display on the screen.

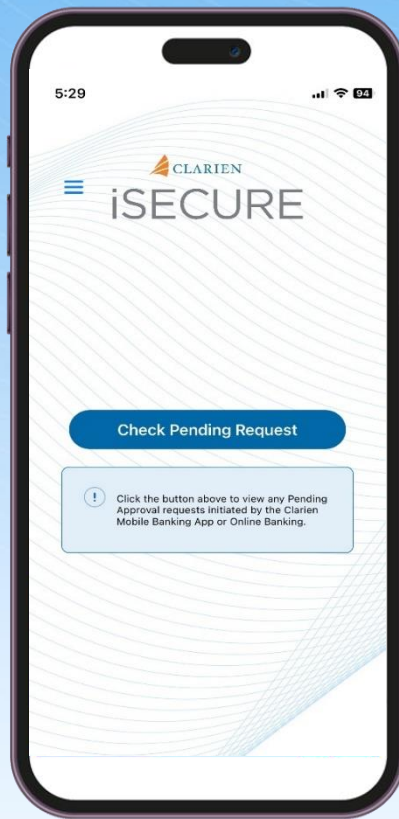
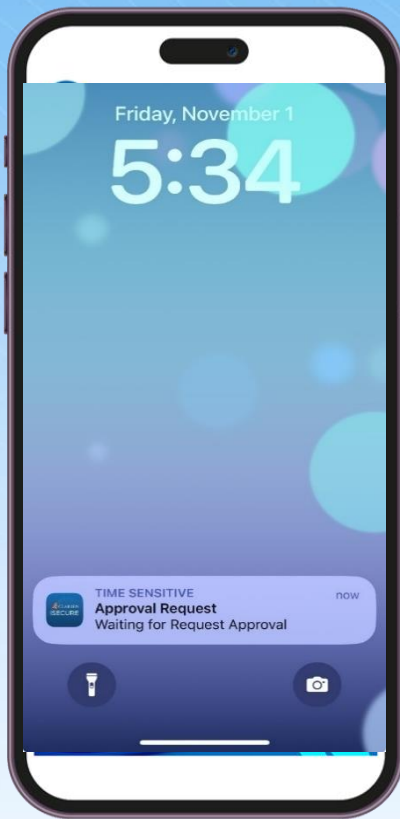
If you are using the Clarien Security Key USB Hard Token, please be sure your device is inserted into a USB port. Enter your Security Key PIN, then select OK.



You will then be prompted to touch your security key. Simply touch the edge of the device with the tip of your finger.

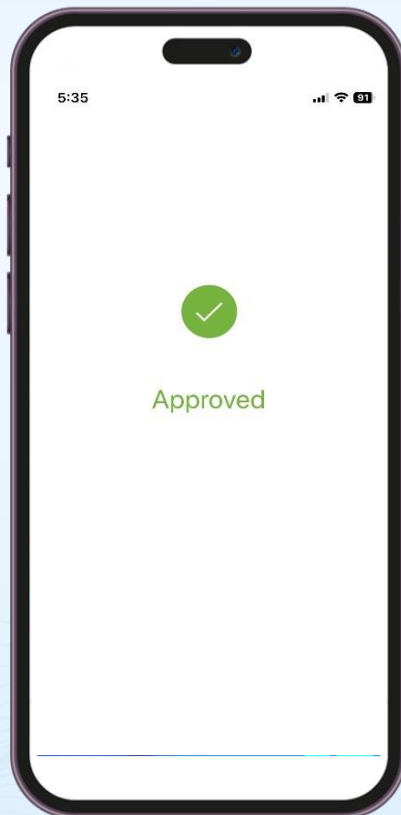
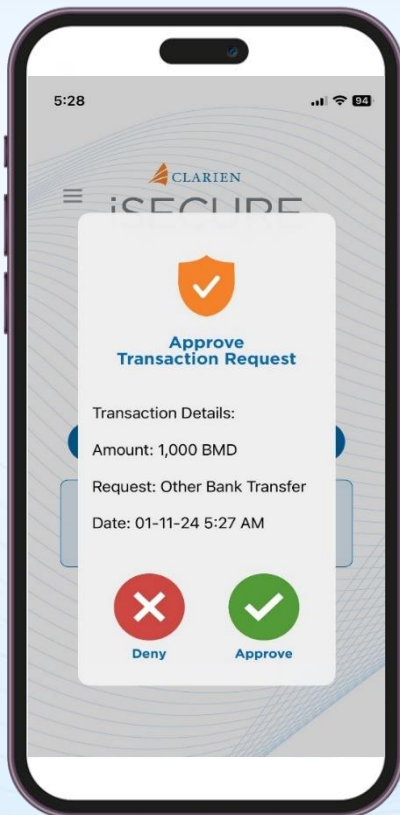


If you are using the iSecure soft token authenticator, your notification will advise you to check your mobile app.



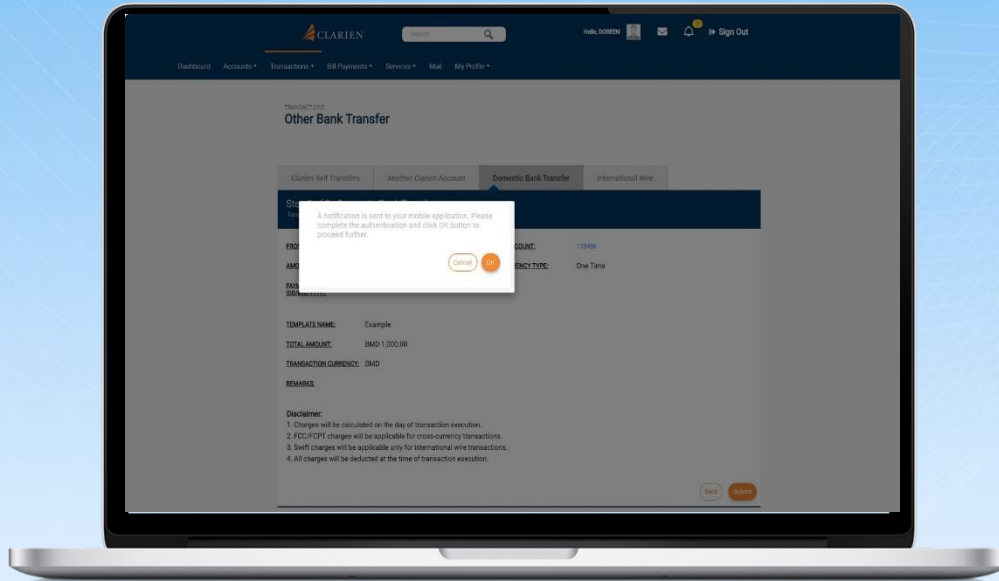
Click on the iSecure notification on your mobile device screen, which will open the iSecure app.

Then, click on the Check Pending Request button.

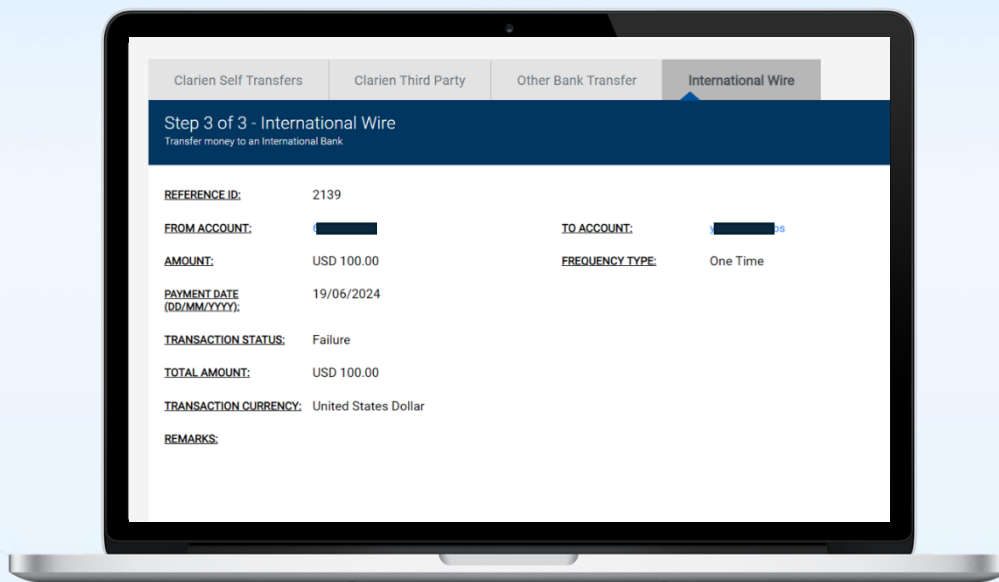


Review the Transaction Request details. If correct, select Approve.

iSecure will confirm your approval.



Return to your laptop or desktop and select OK to proceed.

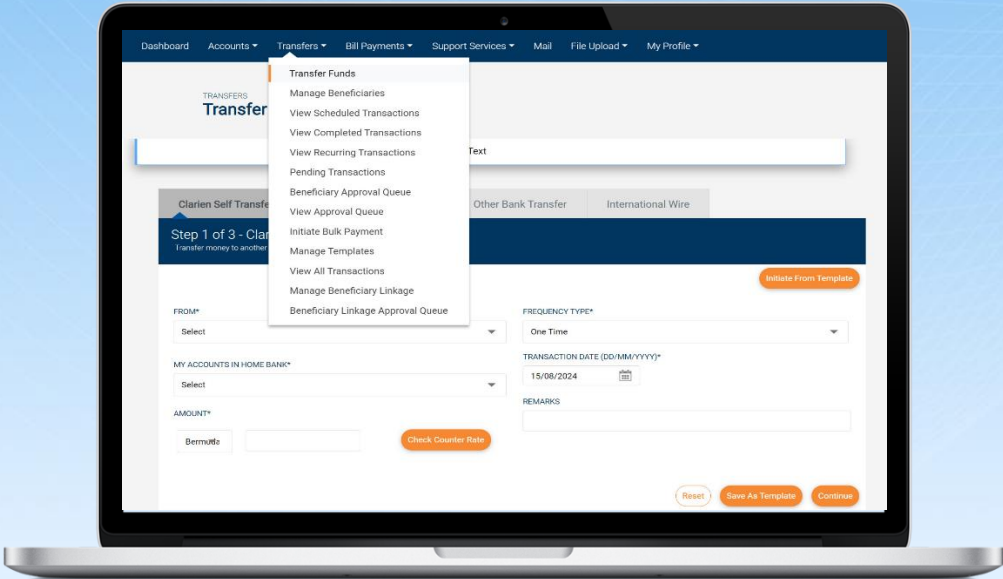


The final step is to review your transaction details

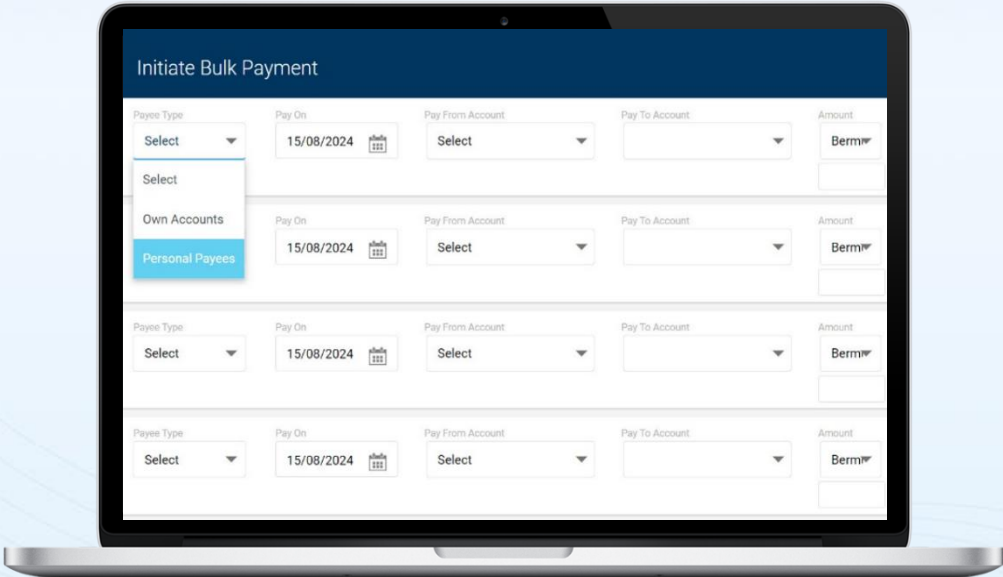
If everything is correct, select Submit.

INITIATE BULK PAYMENT

To make multiple debit payments, select Initiate Bulk Payment from the Transaction menu.



Begin by selecting the Payee Type – is the payment to your own account, or a personal payee?



Then, select the date that you want to make this payment.

Next, select the account you are paying from and the account you are paying to.

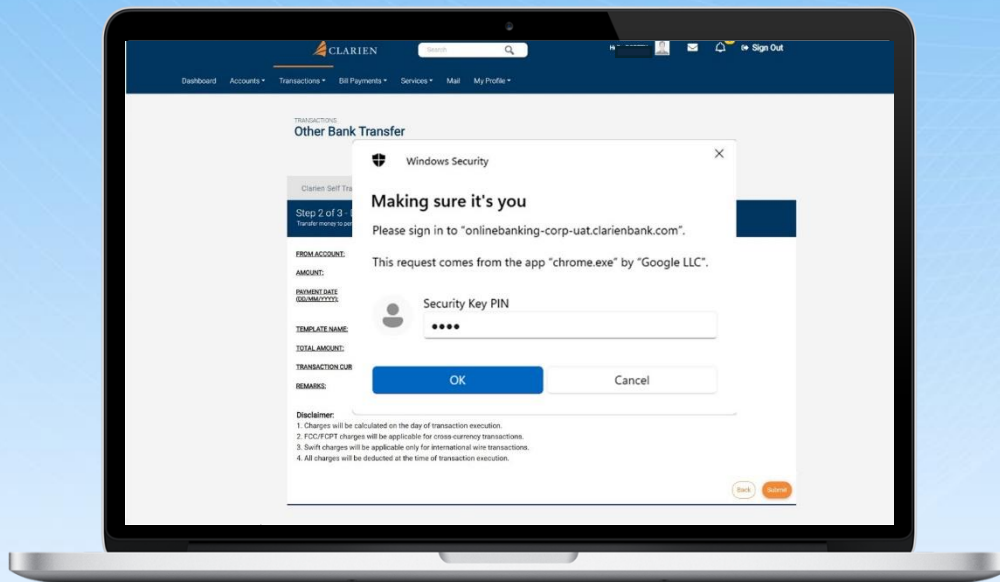
| Payee Type      | Pay On     | Pay From Account | Pay To Account      | Amount               | Remarks |
|-----------------|------------|------------------|---------------------|----------------------|---------|
| Own Accounts    | 05/07/2024 | 6000232106       | XXXXXXXXXX          | Bermuda Dollar 10.00 | test1   |
| Personal Payees | 05/07/2024 | 6000232106       | ACH_Payee           | Bermuda Dollar 20.00 | test2   |
| Personal Payees | 05/07/2024 | 6000232106       | yogesh buchkul      | Bermuda Dollar 30.00 | test3   |
| Personal Payees | 05/07/2024 | 6000232106       | BNTB gift club 2022 | Bermuda Dollar 40.00 | test4   |
| Personal Payees | 05/07/2024 | 6000232106       | water               | Bermuda Dollar 50.00 |         |

Enter your currency, amount and any remarks regarding the transaction.

You'll repeat these steps until you've entered all payments.

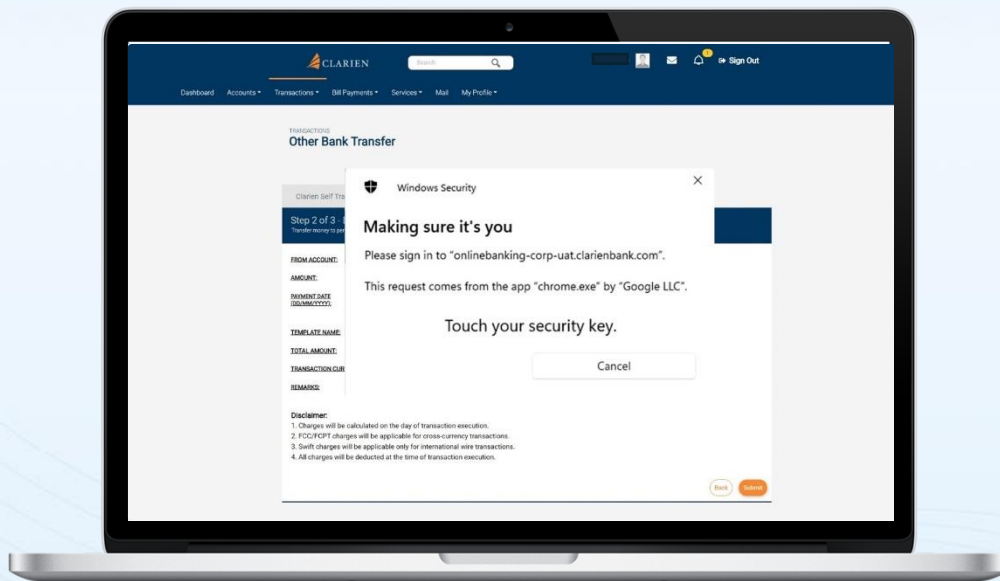
At the bottom of the page, you can add more payments, for a maximum of 30 per bulk payment transaction.

When complete, select Continue to review and submit your Bulk Payment Transaction.



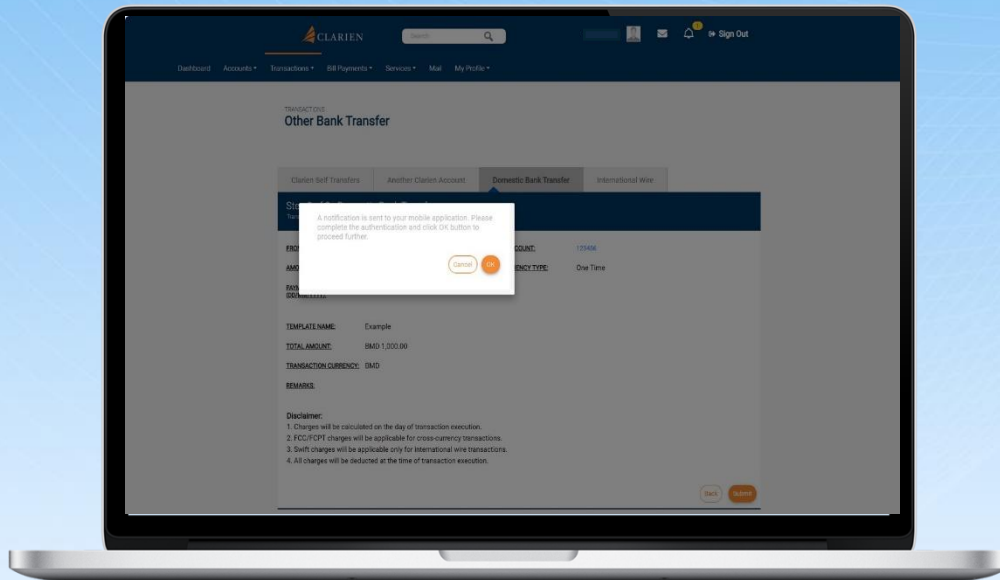
An authentication notification will display on the screen.

If you are using the Clarien Security Key USB Hard Token, please be sure your device is inserted into a USB port. Enter your Security Key PIN, then select OK.



You will then be prompted to touch your security key. Simply touch the edge of the device with the tip of your finger.

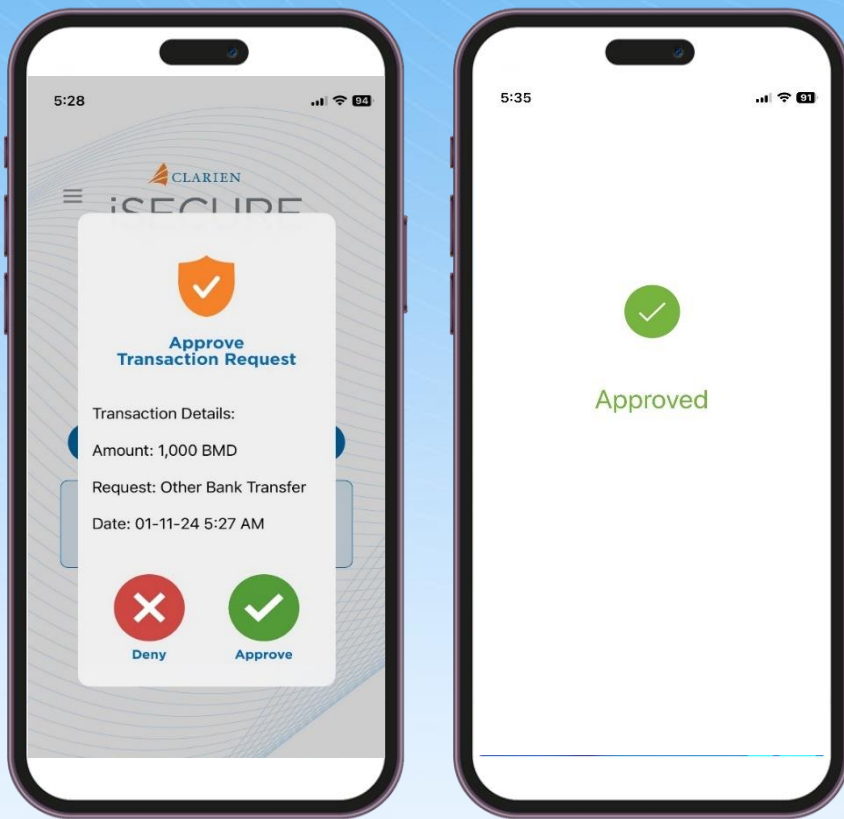
If you are using the iSecure soft token authenticator, your notification will advise you to check your mobile app.



Click on the iSecure notification on your mobile device screen, which will open the iSecure app.

Then, click on the Check Pending Request button.

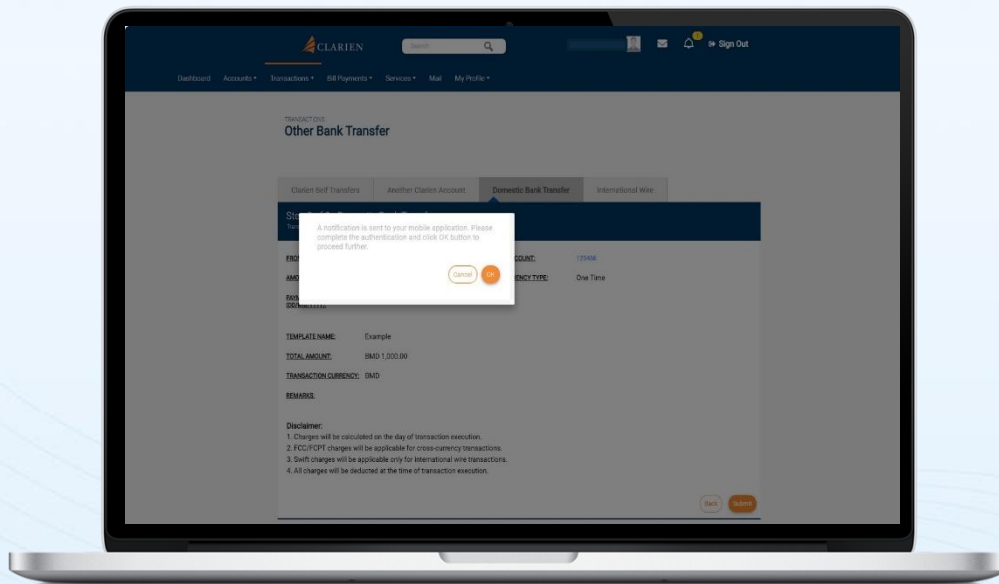


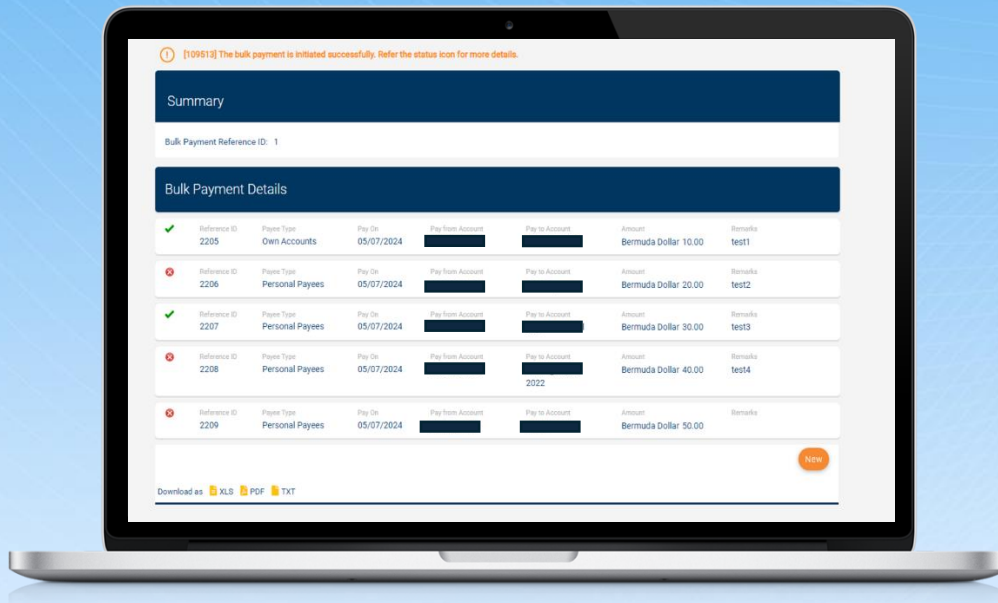


Review the Transaction Request details. If correct, select Approve.

iSecure will confirm your approval.

Return to your laptop or desktop and select OK to proceed.



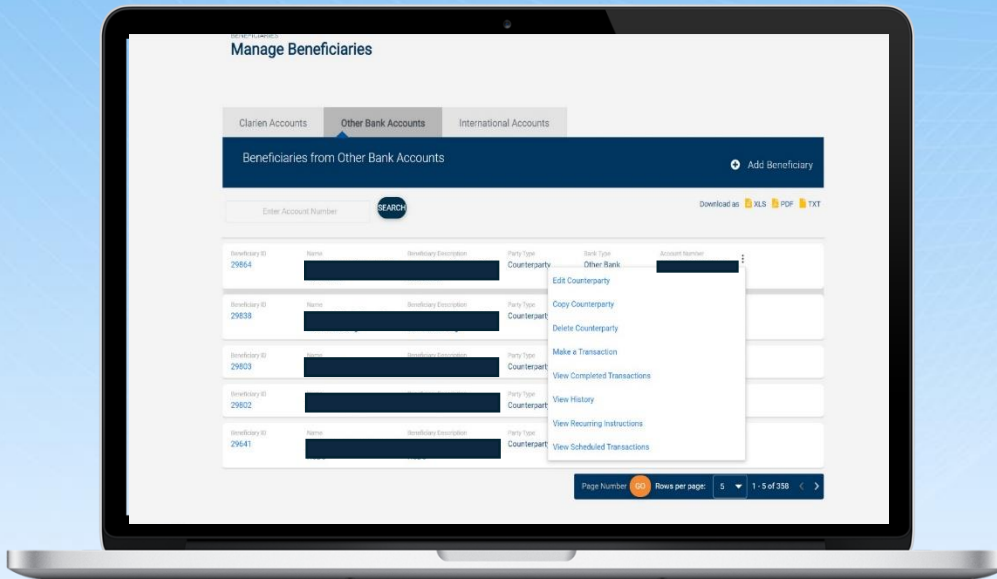


The status of your Bulk Payment transaction will display on screen.

## MANAGE BENEFICIARIES

Select Manage Beneficiaries from the Transactions menu.

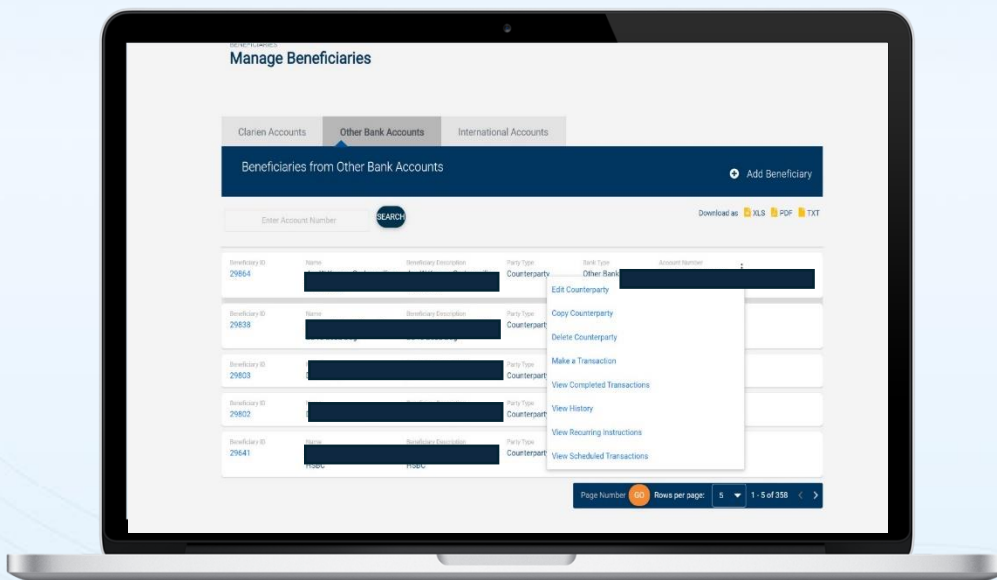
Using the top tabs, select whether to manage beneficiaries for Clarien Accounts, other local banks or international accounts. A list will display as the tabs are selected.



Click on the Beneficiary ID to view Beneficiary Details.

The More Actions menu, the 3 dots to the right of each beneficiary, provides additional options, including:

- Edit Counterparty
- Copy Counterparty
- Delete Counterparty
- Make a Transaction
- View Completed Transactions
- View History
- View Recurring Instructions
- View Scheduled Transactions



**Manage Beneficiaries**

**Edit Beneficiary - Other Bank**  
Fill in all required fields (\*)

**Beneficiary Details**

Beneficiary ID: 29854

Name\*

Beneficiary Description\*

Address

Country: Select

State/province

ZIP code/Postal code

Access Type\* Global

To Edit Counterparty, or Beneficiary, click on any of the detail fields and update the current information. The Beneficiary Name and Description are required in the Beneficiary Details section.

Country: Select

State/province

ZIP code/Postal code

Access Type\* Global

**Account Details**

Account Number\*

Confirm Account Number\*

Beneficiary Bank\*

**Bank Details**

Beneficiary Bank Name: BUTTERFIELD BANK, HAMILTON BDA

Branch: Hamilton

In the Account Details section, the Account Number and Beneficiary Bank are required.

Once the changes are complete, select Continue.

Clarien Self Transfers   **Another Clarien Account**   Other Bank Transfer   International Wire

**Step 1 of 3 - Another Clarien Account**  
Transfer money to other persons within Clarien

FROM\*  
XXXXXXXXXX(BMD) - 6000152099

Available Balance : BMD 88,571.94

FREQUENCY TYPE\*  
One Time

TRANSACTION DATE (DD/MM/YYYY)\*  
22/06/2024

COUNTERPARTY TYPE\*  
Personal Payees

PERSONAL PAYEES\*  
sanju test - 6000000082

REMARKS

AMOUNT\*  
Bermuda 1

Check Counter Rate

Back   Reset   Save As Template   Continue

If you choose to Make a Transaction, the transfer form will display. Complete the form to initiate your transaction.

Initiate From Template

FROM\*  
RAMESH KUM(USD) - 6000316231

Available Balance : USD 2,313.00

FREQUENCY TYPE\*  
Recurring

FREQUENCY  
Daily

MY ACCOUNTS IN HOME BANK\*  
XXXXXXXXXX(BMD) - 6000098326

START DATE (DD/MM/YYYY)\*  
14/06/2024

AMOUNT\*  
Bermuda 100

Check Counter Rate

Please Enter :  
NUMBER OF INSTALLMENTS  
12

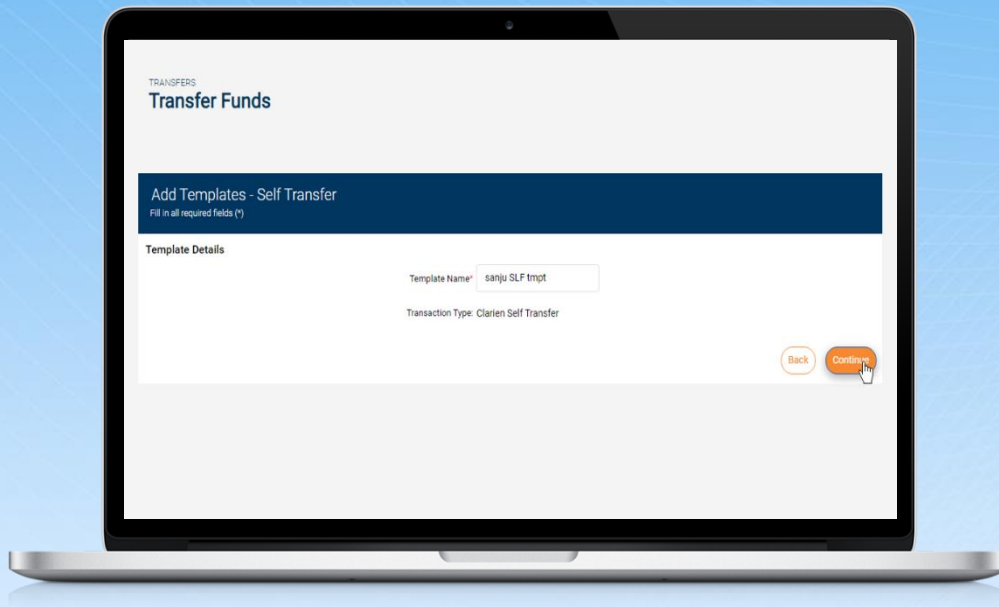
OR  
END DATE (DD/MM/YYYY)  
14/06/2025

REMARKS  
test

Reset   Save As Template   Continue

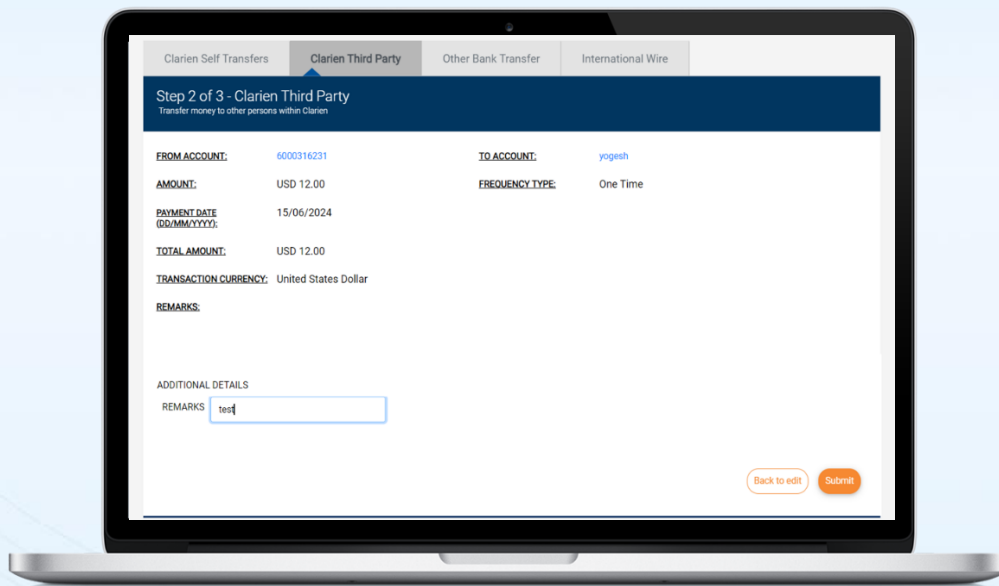
If this is a Recurring Transaction, select the frequency of the transaction, the Start Date, the Number of Installments or an End Date.

Save your entry as a Template or simply Continue.

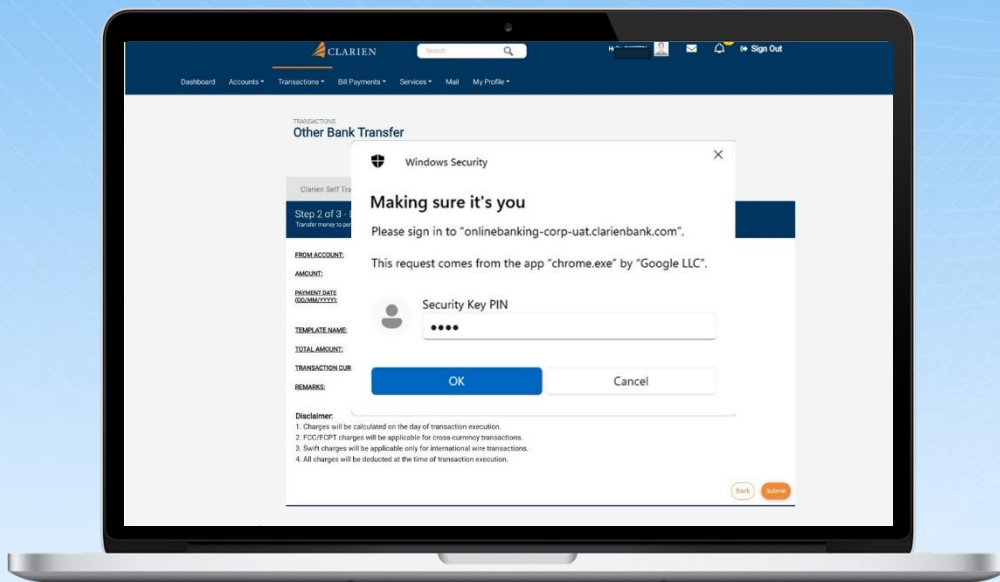


If you select Save As Template, enter the Template Name, then select Continue.

The next step is to review your transaction details. If you need to make any changes, select the Edit button, then make your changes.

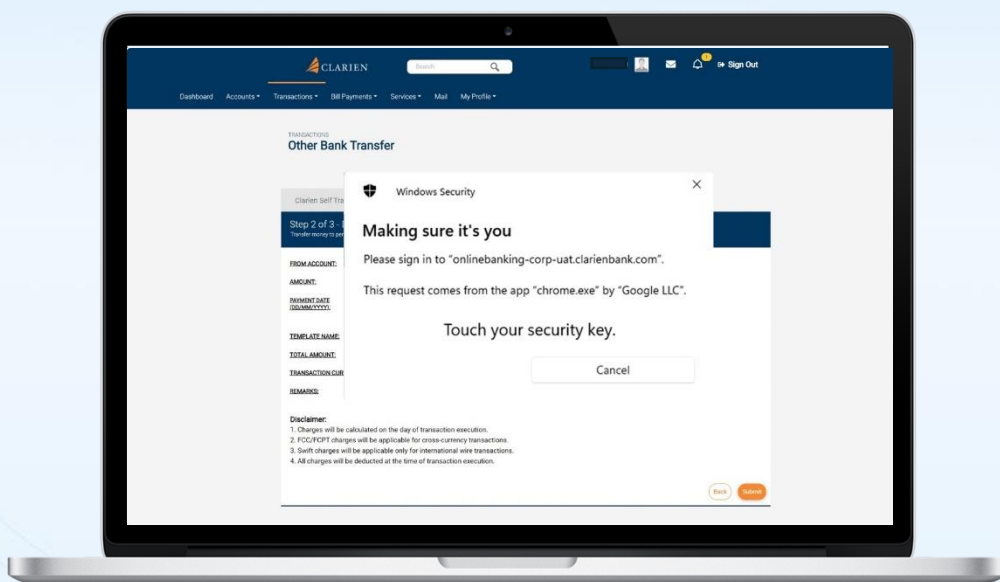


The next step is to review your transaction details. If you need to make any changes, select the Edit button, then make your changes.

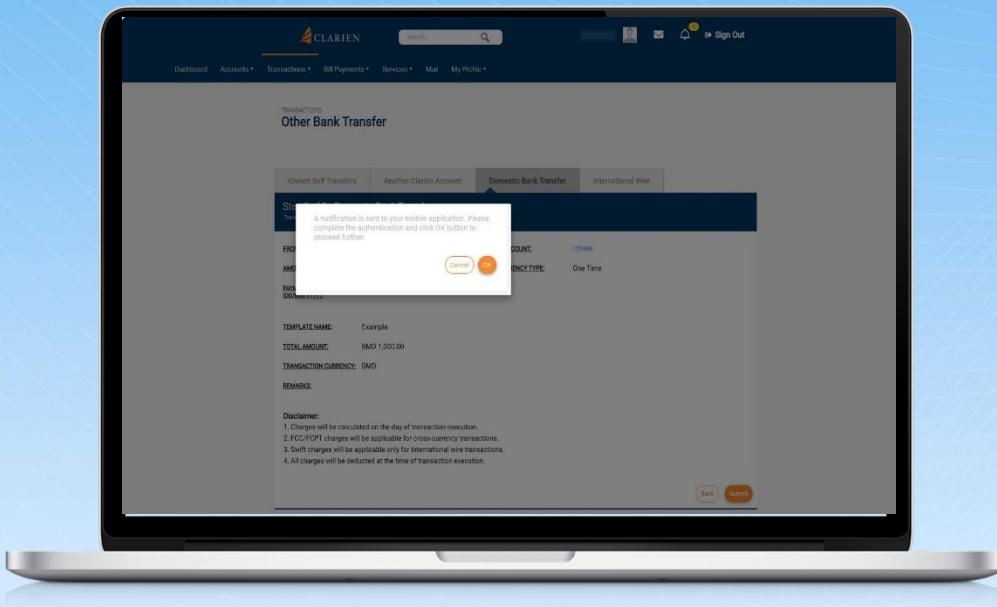


An authentication notification will display on the screen.

If you are using the Clarien Security Key USB Hard Token, please be sure your device is inserted into a USB port. Enter your Security Key PIN, then select OK.



You will then be prompted to touch your security key. Simply touch the edge of the device with the tip of your finger.

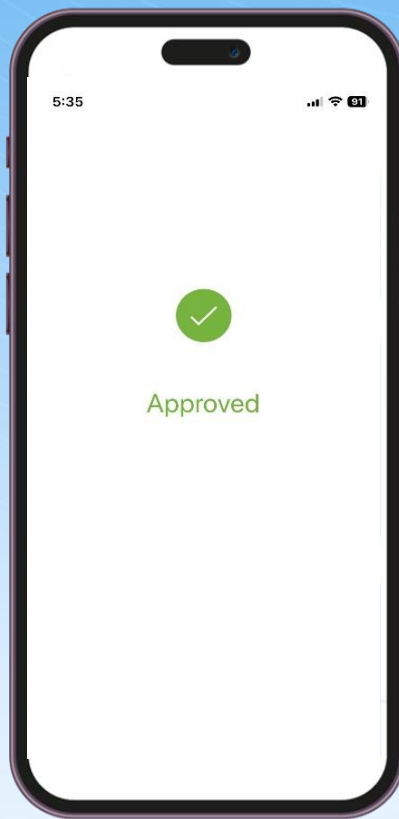
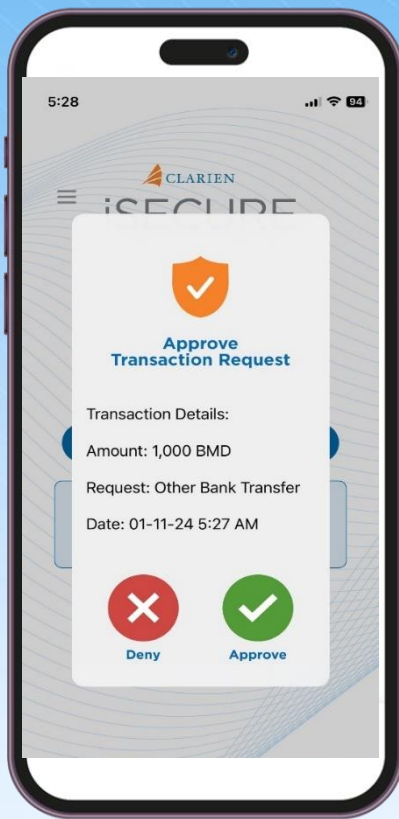


If you are using the iSecure soft token authenticator, your notification will advise you to check your mobile app.



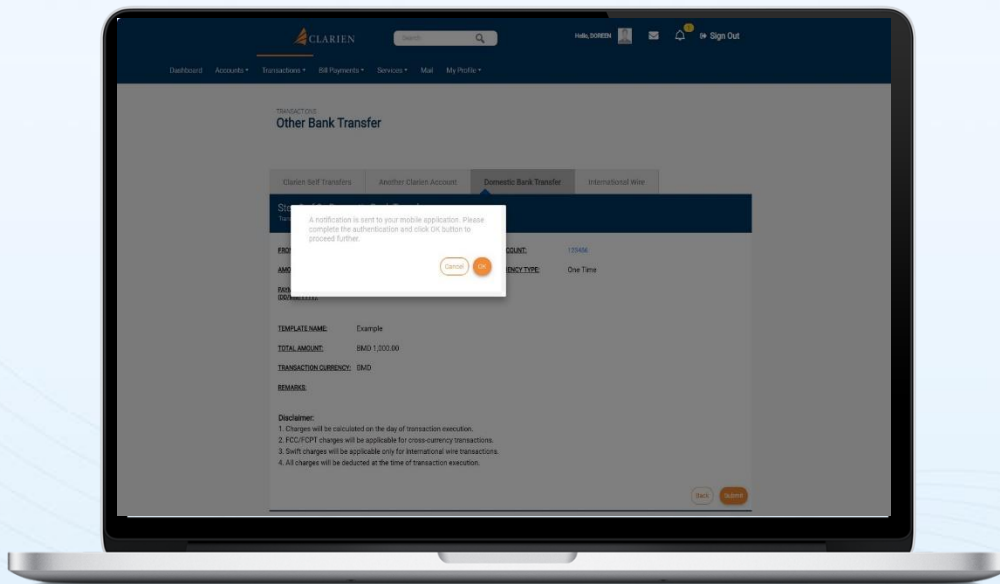
Click on the iSecure notification on your mobile device screen, which will open the iSecure app.

Then, click on the Check Pending Request button.

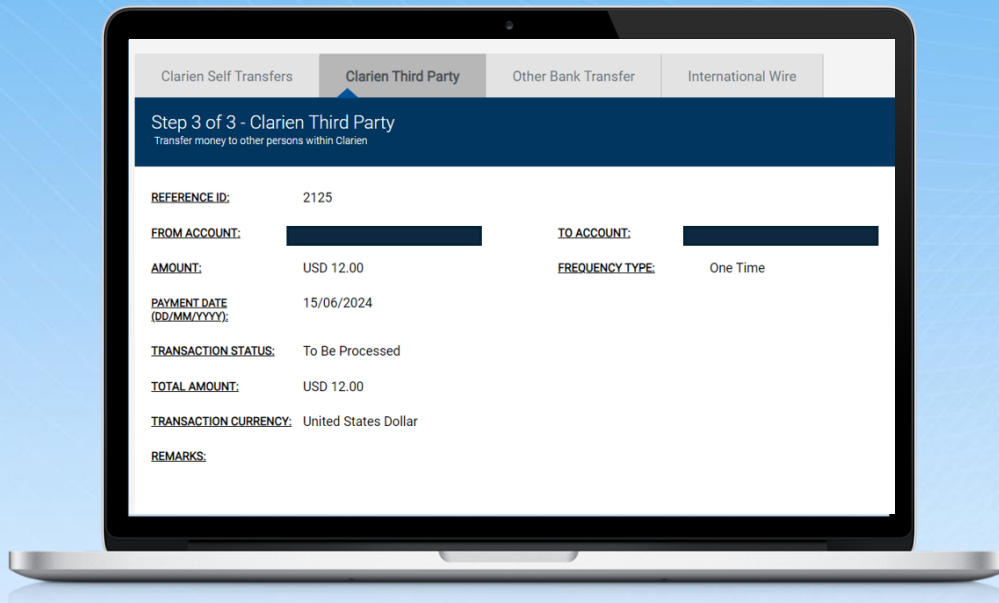


Review the Transaction Request details. If correct, select Approve.

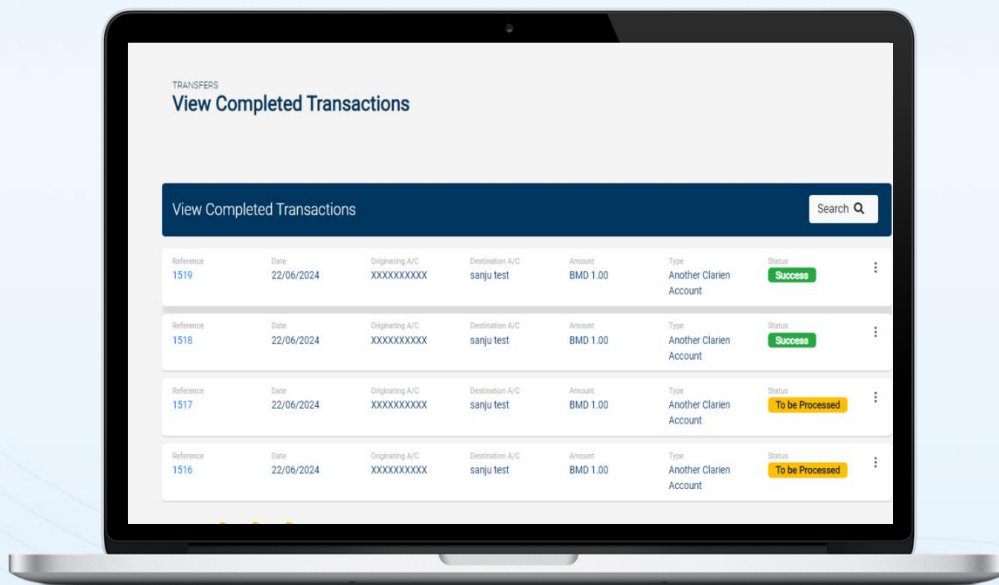
iSecure will confirm your approval.



Return to your laptop or desktop and select OK to proceed.



If everything is correct, select Submit. You will then be able to view and download your transfer details.



View the status of your transfer by selecting View Completed Transactions in the Transfer menu.

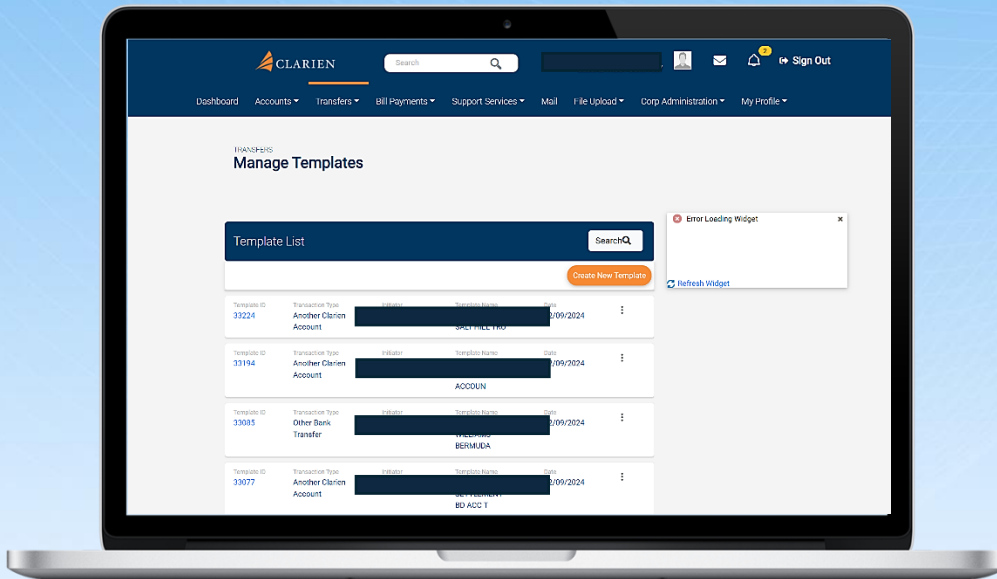
You may also View History, View Recurring Instructions and View Scheduled Transactions from the Transfer Menu.

## MANAGE TEMPLATES

Begin by selecting Manage Templates from the Transactions menu. Your current template list will display.

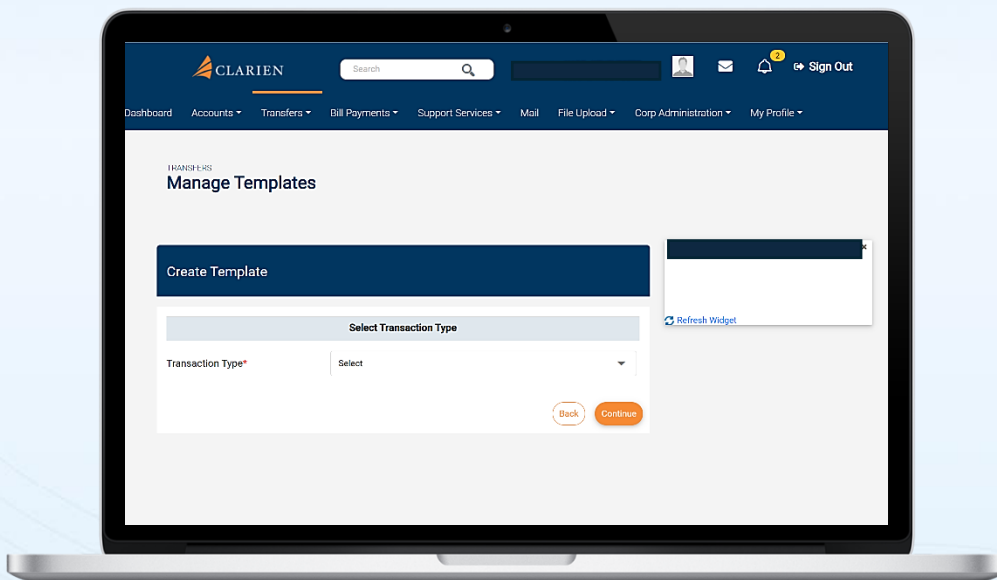
Click on the Template ID number to view details.

Or, click on the Create New Template button to proceed with a new template.



Use the drop-down list to select your Transaction Type:

- Bill Payment
- Clarien Self Transfers
- Another Clarien Account
- Other Domestic Account
- International Wire



WAXPERS  
Manage Templates

Clarien Self Transfers   **Another Clarien Account**   Other Bank Transfer

International Wire

**Step 1 of 3 - Another Clarien Account**  
Transfer money to other persons within Clarien

FROM  
Select

AD HOC PAYEE NAME\*  
[Redacted]

ACCOUNT NUMBER\*  
[Redacted]

CONFIRM ACCOUNT NUMBER\*  
[Redacted]

AMOUNT  
USD

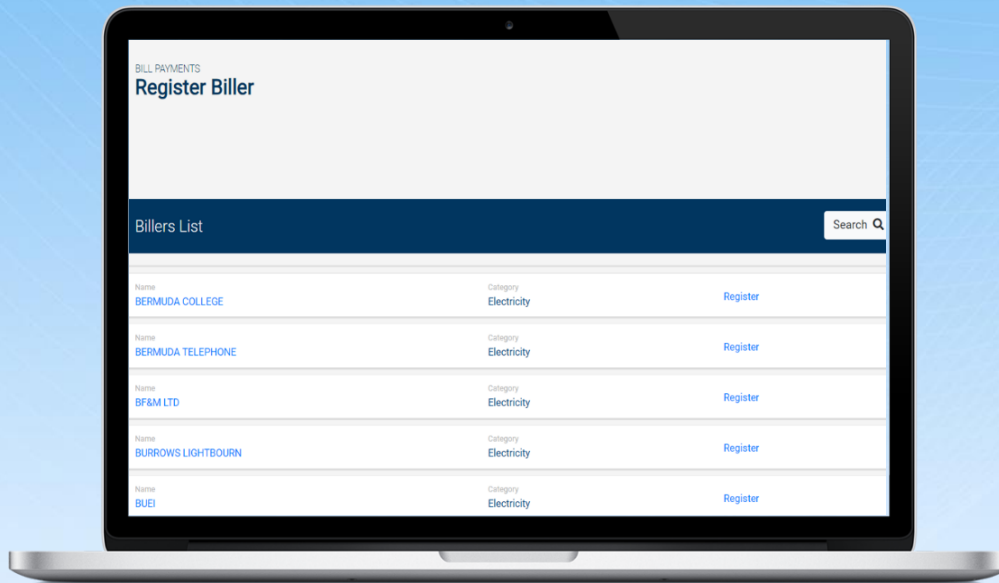
Check Current Rate

Refresh Widget

Then, complete the account information required for the template.

Once complete, select Submit. Your template is now visible in your Templates List.

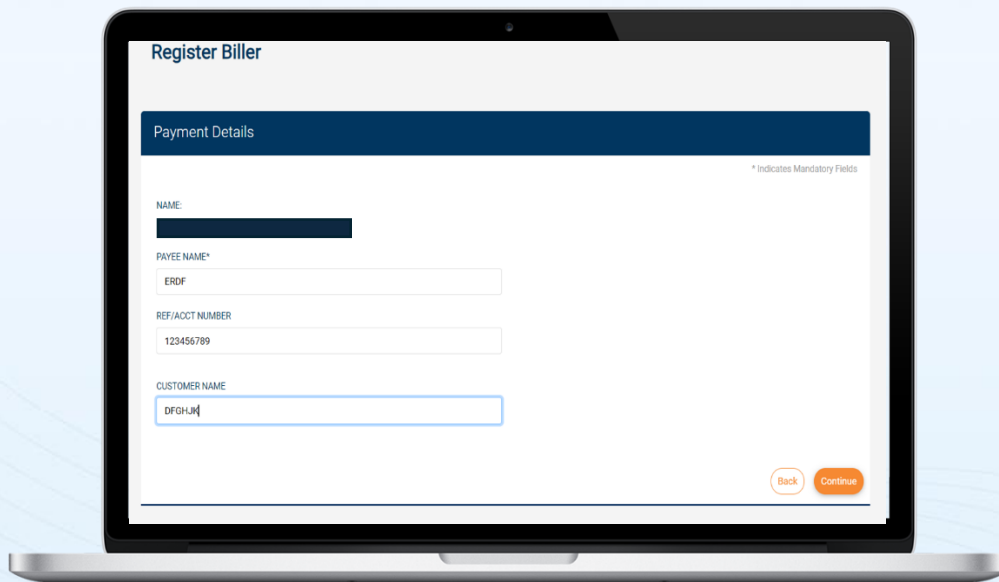
## REGISTER BILLER



Select Register Biller from the Bill Payments menu. The list of available billers is shown below in alphabetical order.

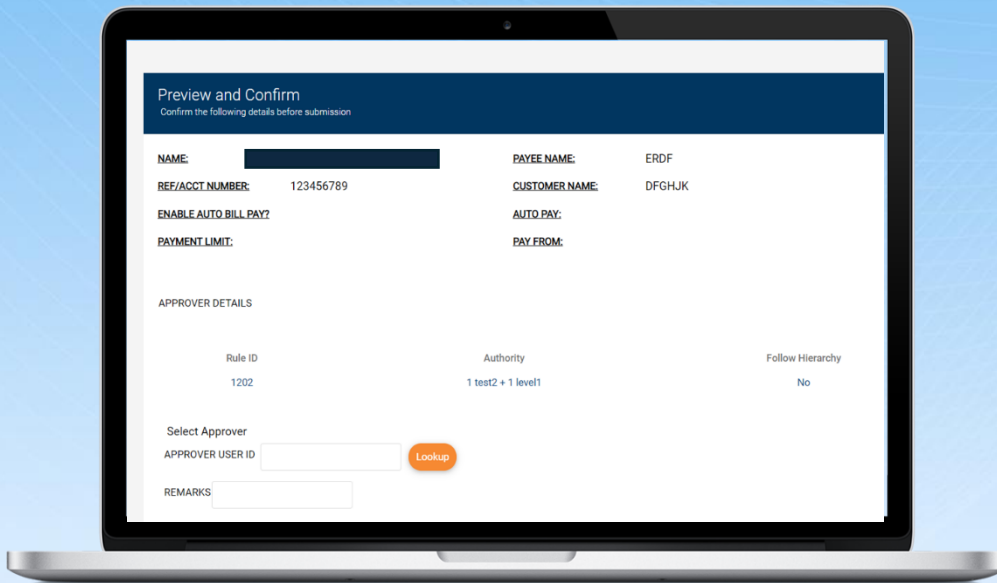
To quickly search for a specific biller, select the Search button and enter the Biller name and select a category. If you'd like to view Biller service details, click on the biller name.

Select the Register link to the right of the Biller name to begin the registration process.

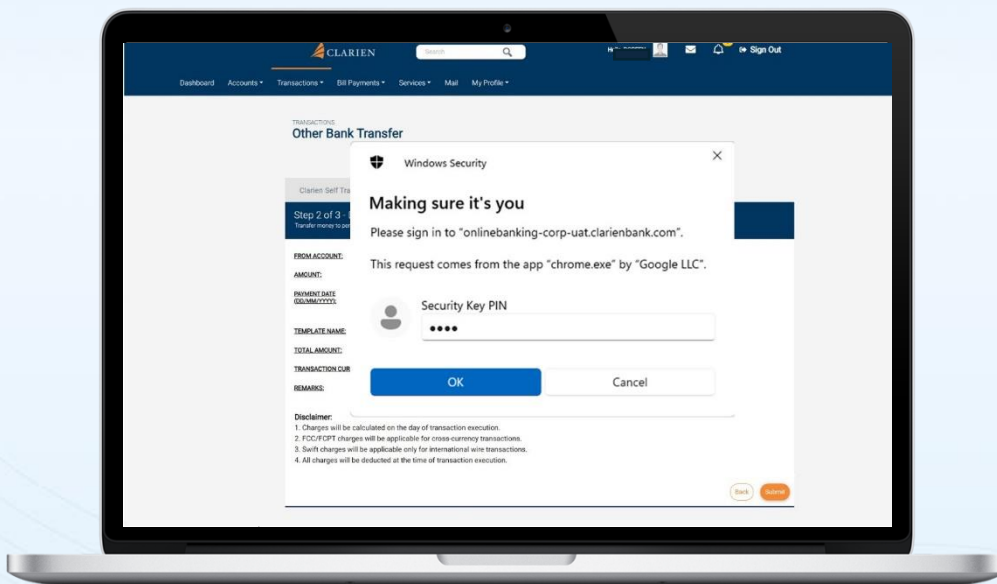


The payment page will display. Enter the Payee Name, your reference or account number and your customer name.

Review your Biller details. If everything is correct, select Continue.

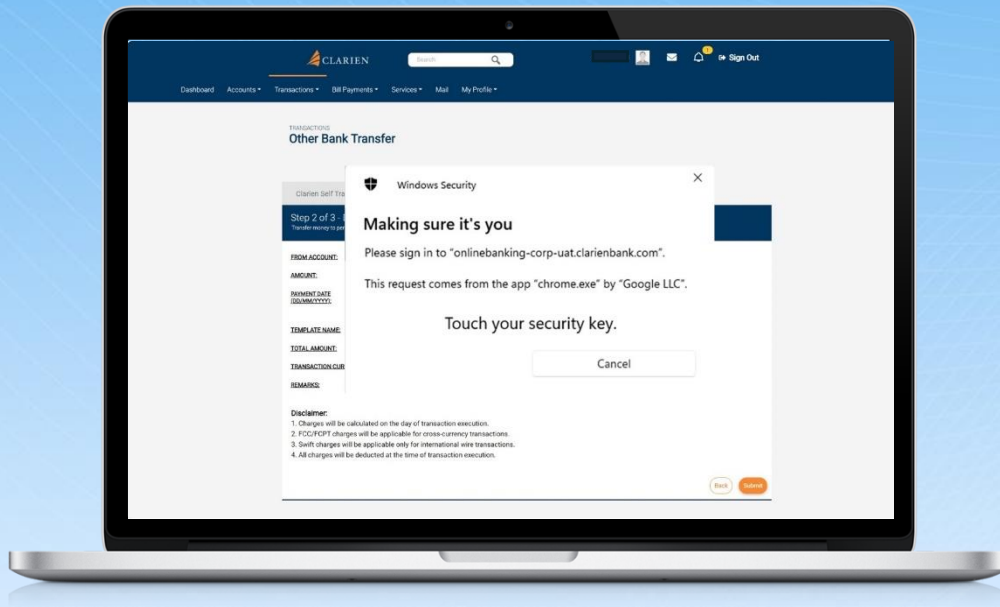


Review and confirm the biller registration details. Your Approve Details should also be reviewed. When complete, select Submit.

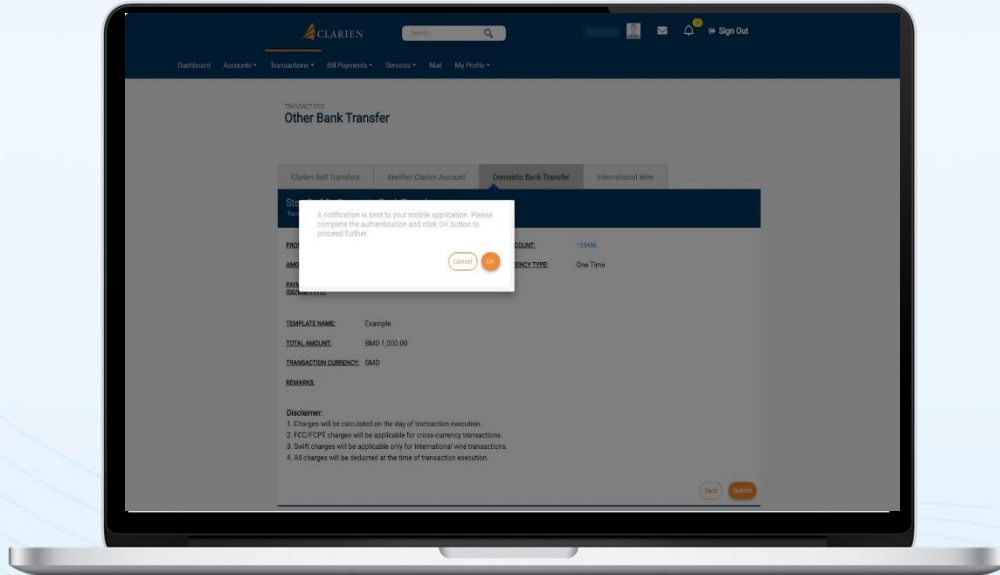


An authentication notification will display on the screen.

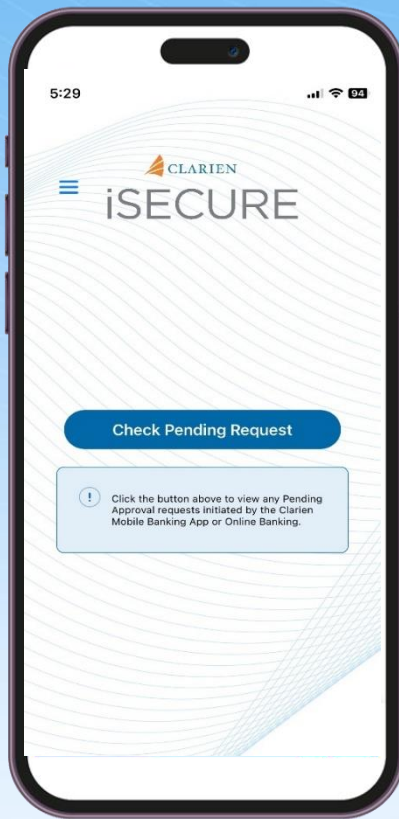
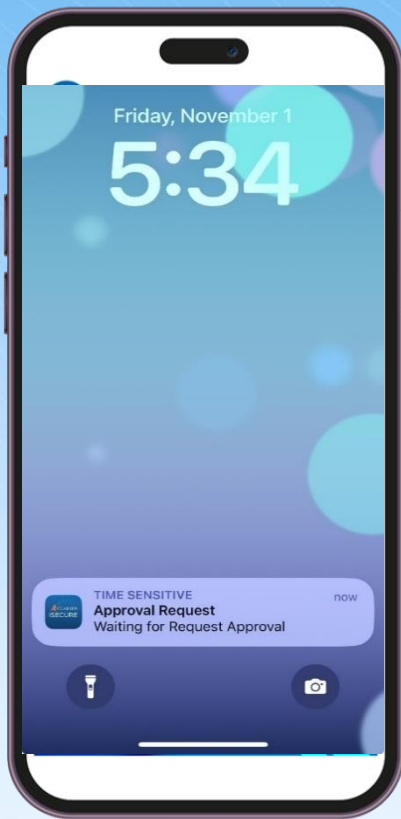
If you are using the Clarien Security Key USB Hard Token, please be sure your device is inserted into a USB port. Enter your Security Key PIN, then select OK.



You will then be prompted to touch your security key. Simply touch the edge of the device with the tip of your finger.

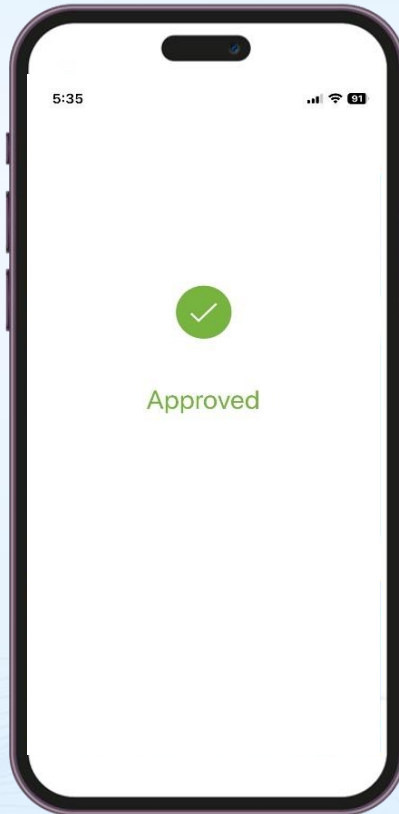
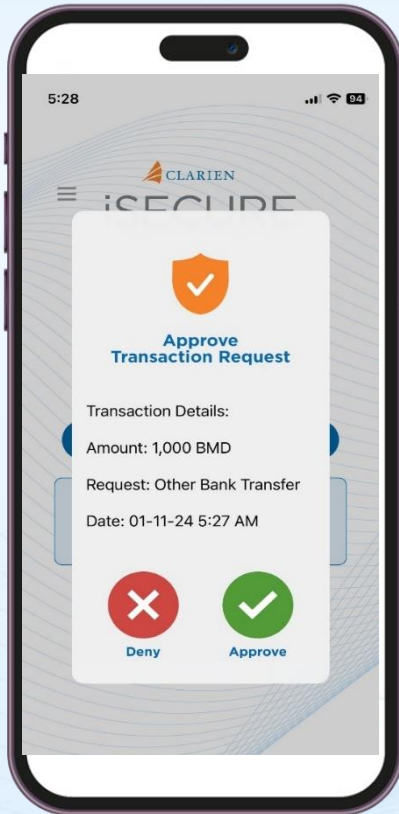


If you are using the iSecure soft token authenticator, your notification will advise you to check your mobile app.



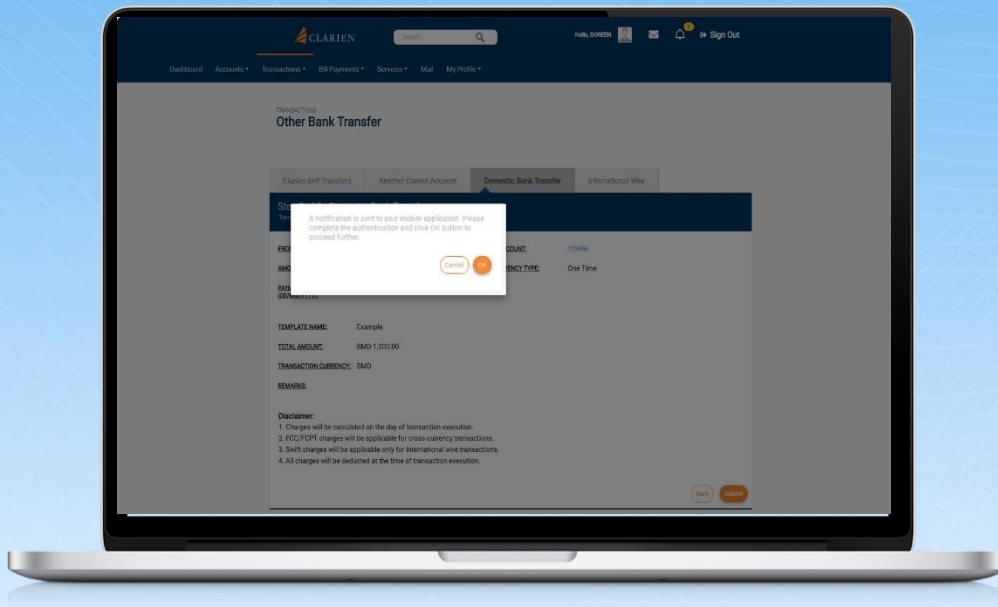
Click on the iSecure notification on your mobile device screen, which will open the iSecure app.

Then, click on the Check Pending Request button.

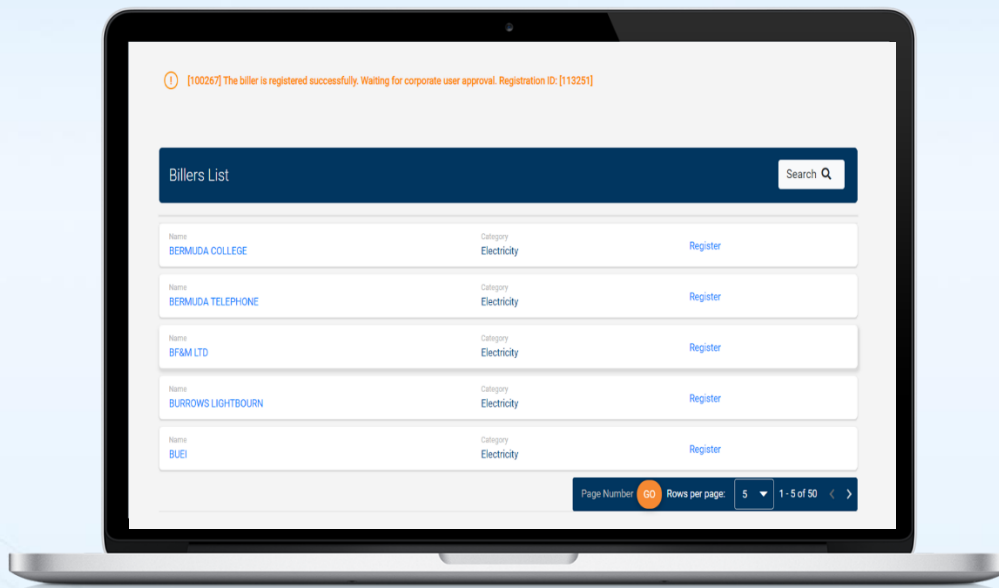


Review the Transaction Request details. If correct, select Approve.

iSecure will confirm your approval



Return to your laptop or desktop and select OK to proceed.



A confirmation message will appear confirming your biller registration. Additional approvers may be required per your Approver rules.

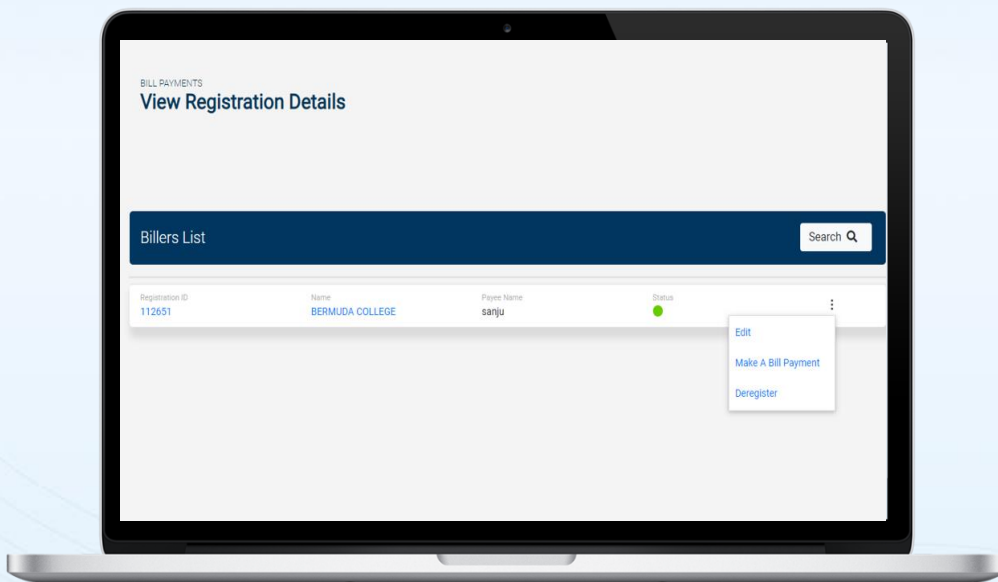
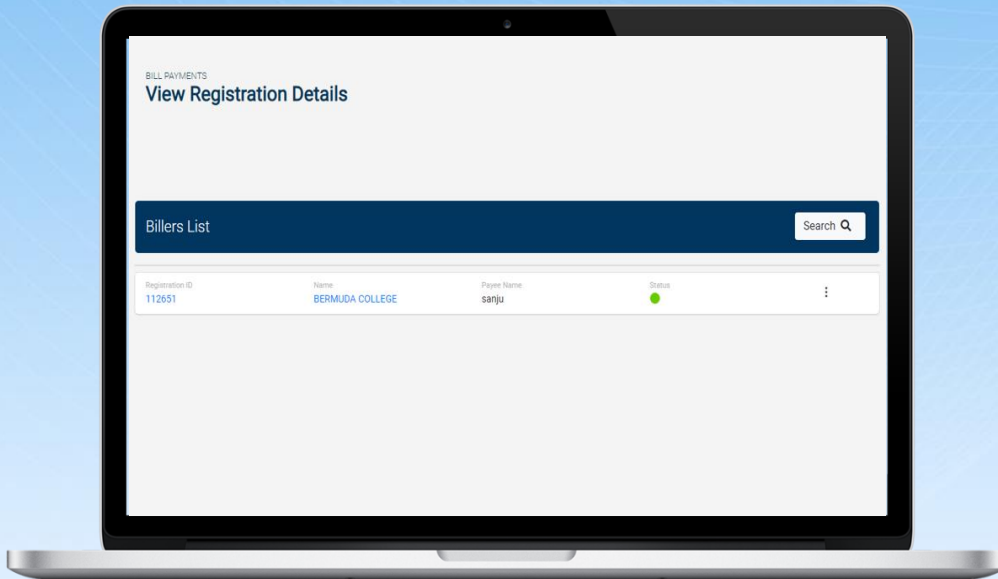
## VIEW REGISTRATION DETAILS

You may view registration details from the Bill Payments menu.

Your current list of billers will display.

Click the Search button to quickly locate an existing biller.

Click on the Registration ID to view Biller details.



Use the More Actions option to the right of each biller to Edit the biller details, Make a Payment or Deregister a biller.

BILL PAYMENTS  
View Registration Details

**Edit Biller**

NAME:  
DIGICEL

PAYEE NAME\*  
Example

REF/ACCT NUMBER:  
123

CUSTOMER NAME:  
Example

Back Update

If Edit is selected, you may enter a new Payee Name, then choose Update.

BILL PAYMENTS  
View Registration Details

**Payment Details**

Initiate From Template

FROM\*  
Available Balance : BMD 88,566.44

FREQUENCY TYPE\*  
One Time

PAYMENT BILLERS\*  
sanju

TRANSACTION DATE (DD/MM/YYYY)\*  
25/06/2024

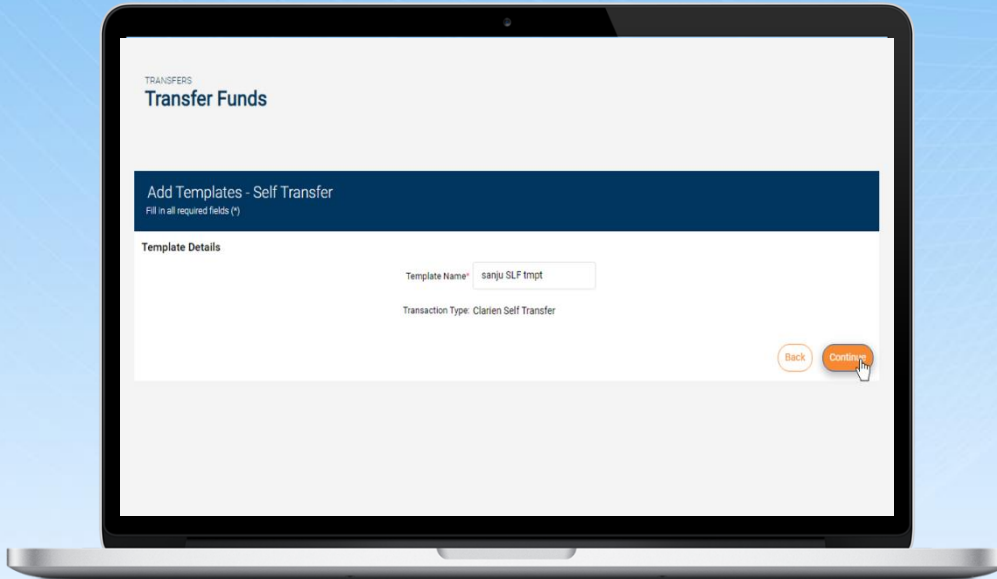
AMOUNT\*  
Bermude 5

REMARKS  
sch bill

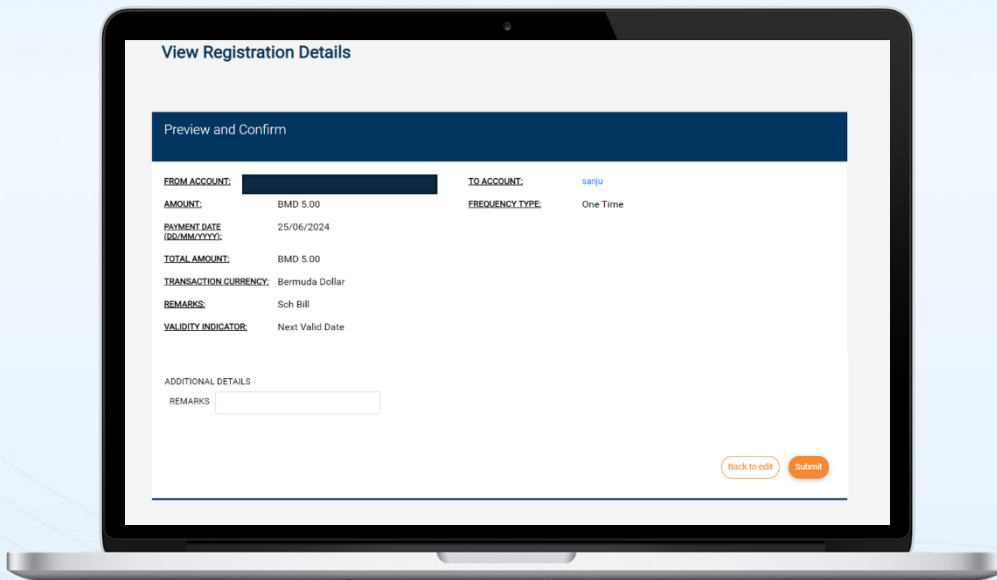
Back Reset Save As Template Continue

To Make A Payment, you can initiate payment from a template by selecting the button in the top, right of the payment screen. Or enter the Payment Details.

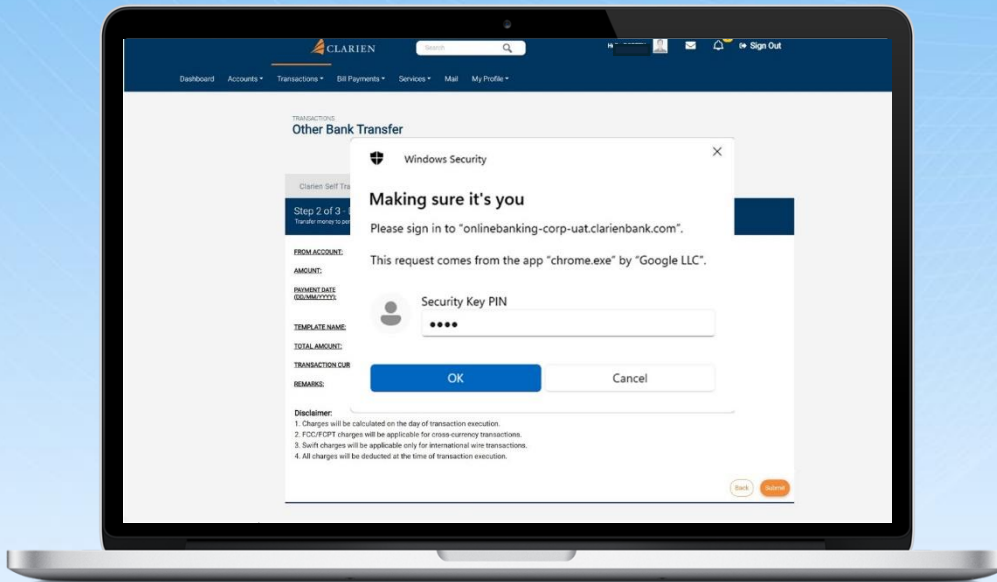
Save your entry as a Template or simply Continue.



If you selected Save As Template, enter the Template Name, then select Continue.

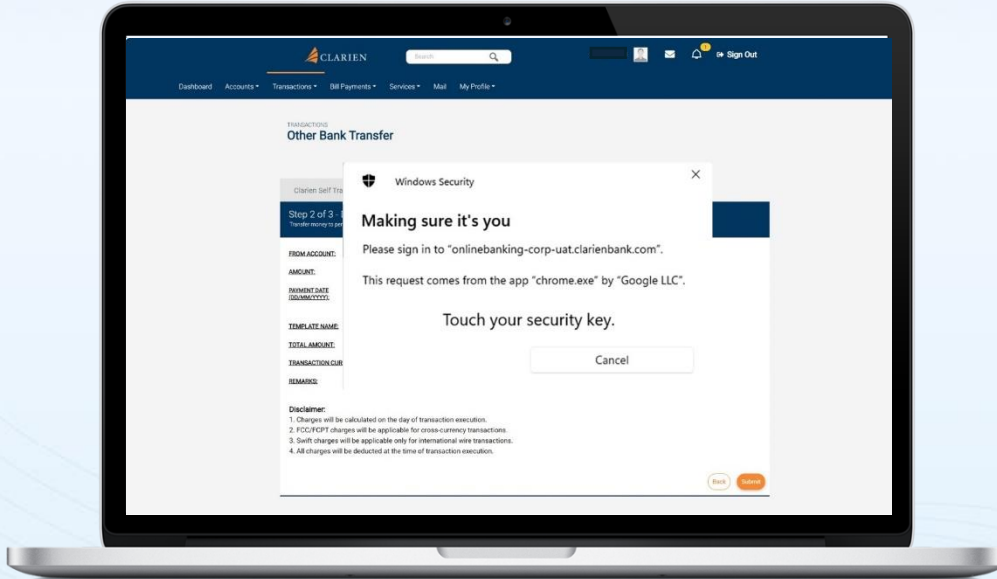


Then, review and confirm your payment and Submit.

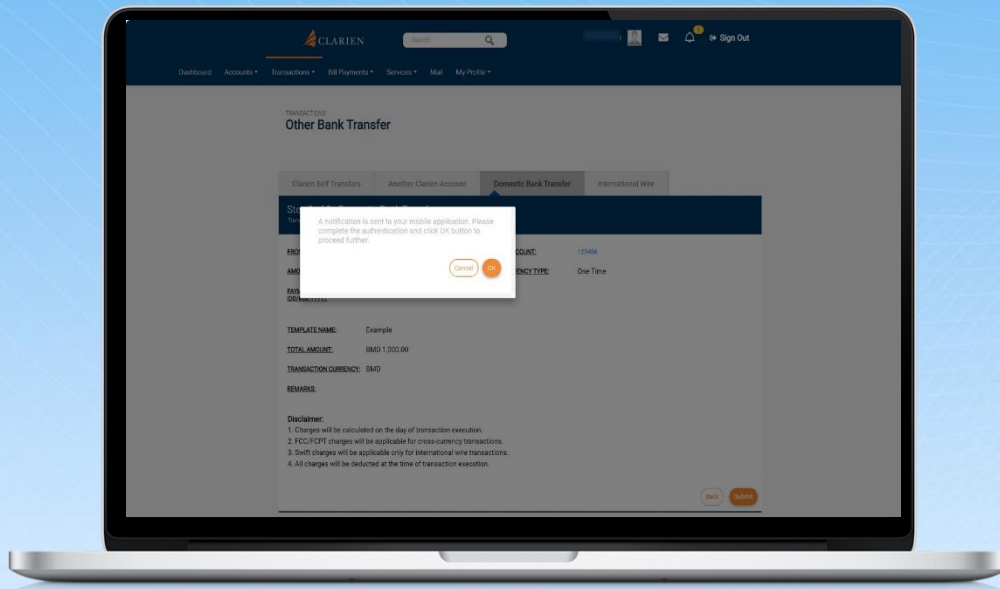


An authentication notification will display on the screen.

If you are using the Clarien Security Key USB Hard Token, please be sure your device is inserted into a USB port. Enter your Security Key PIN, then select OK.



You will then be prompted to touch your security key. Simply touch the edge of the device with the tip of your finger.

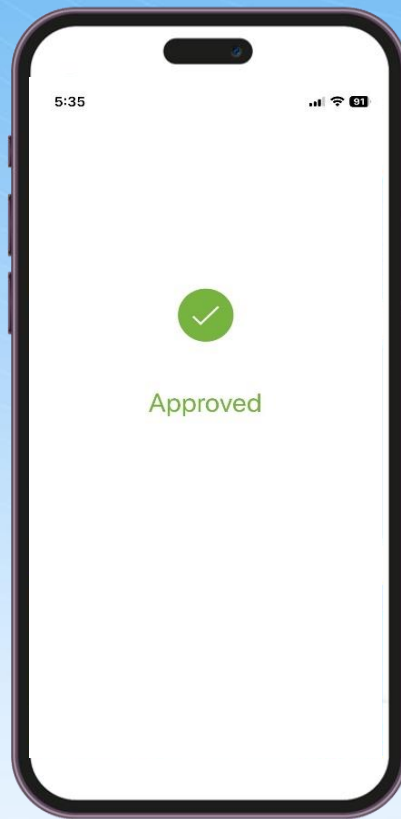
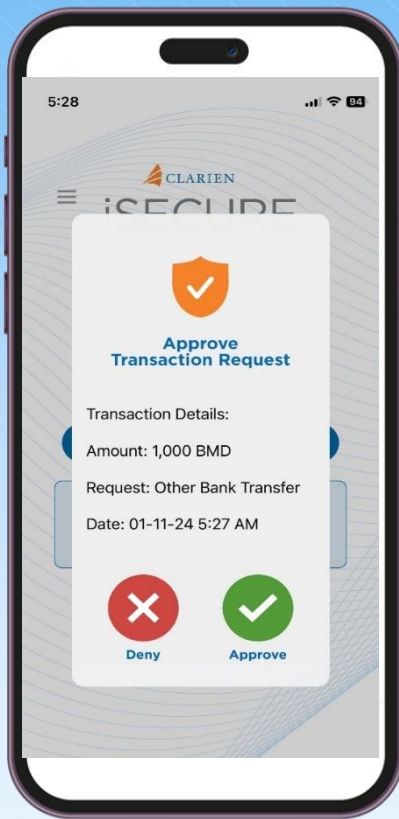


If you are using the iSecure soft token authenticator, your notification will advise you to check your mobile app.



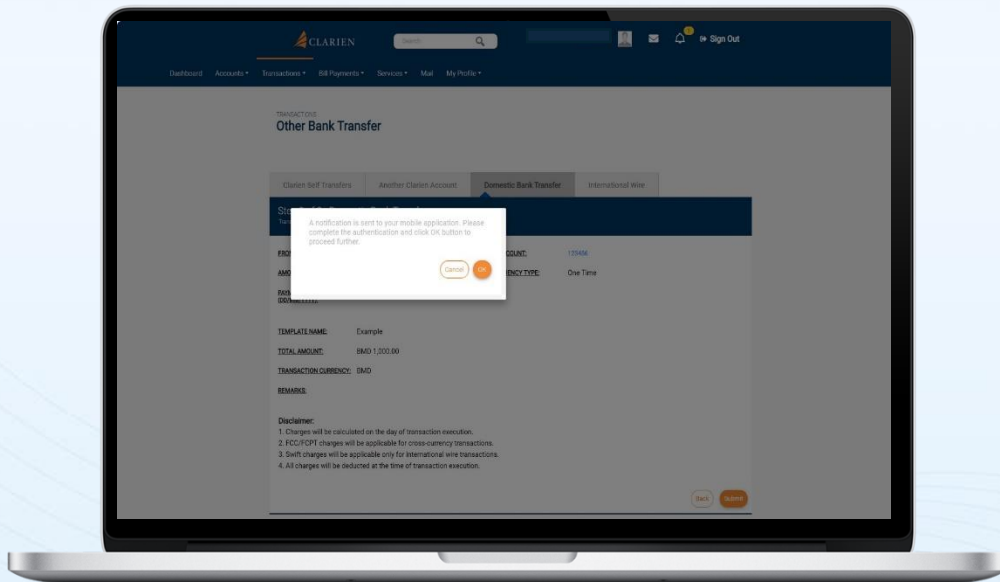
Click on the iSecure notification on your mobile device screen, which will open the iSecure app.

Then, click on the Check Pending Request button.



Review the Transaction Request details. If correct, select Approve.

iSecure will confirm your approval



Return to your laptop or desktop and select OK to proceed.

## View Registration Details

🔔 [100761] The transaction with reference ID is submitted successfully and is pending for processing. Ref. ID: [1526]

### Summary

|                               |                        |                 |          |
|-------------------------------|------------------------|-----------------|----------|
| REFERENCE ID:                 | 1526                   | TO ACCOUNT:     | saifu    |
| FROM ACCOUNT:                 |                        |                 |          |
| AMOUNT:                       | BMD 5.00               | FREQUENCY TYPE: | One Time |
| PAYMENT DATE<br>(DD/MM/YYYY): | 25/06/2024             |                 |          |
| NETWORK:                      | Within Bank            |                 |          |
| TRANSACTION STATUS:           | Pending For Processing |                 |          |
| TOTAL AMOUNT:                 | BMD 5.00               |                 |          |
| TRANSACTION CURRENCY:         | Bermuda Dollar         |                 |          |
| REMARKS:                      | Sch Bill               |                 |          |
| VALIDITY INDICATOR:           | Next Valid Date        |                 |          |

Download as: [XLS](#) [PDF](#) [TXT](#)

A summary of your payment is provided.

Deregister Biller will remove the biller from your Billers list.

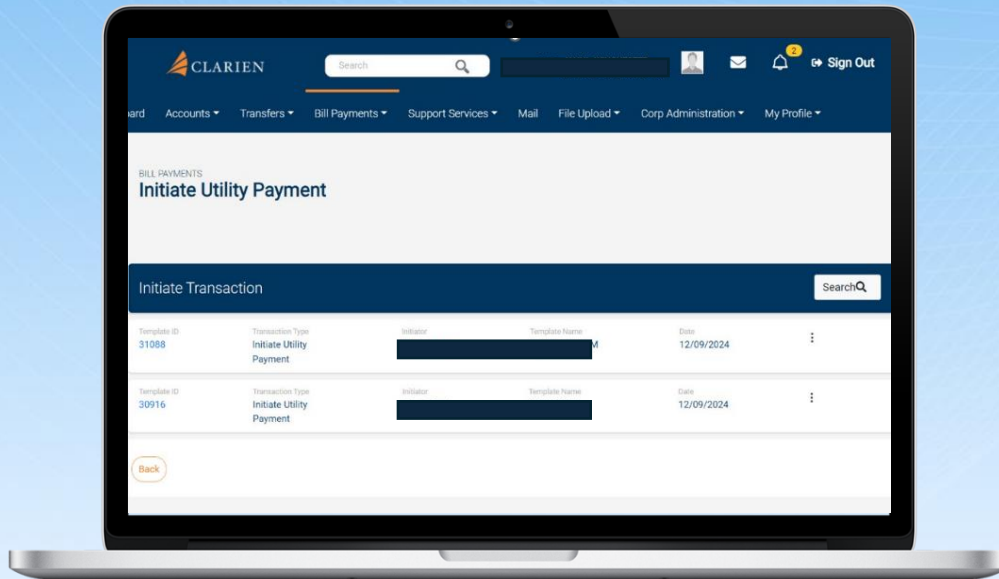
## INITIATE UTILITY PAYMENT

Select Initiate Utility Payment from the Payments menu.

A list of templates will display.

Click on the Template ID to view details.

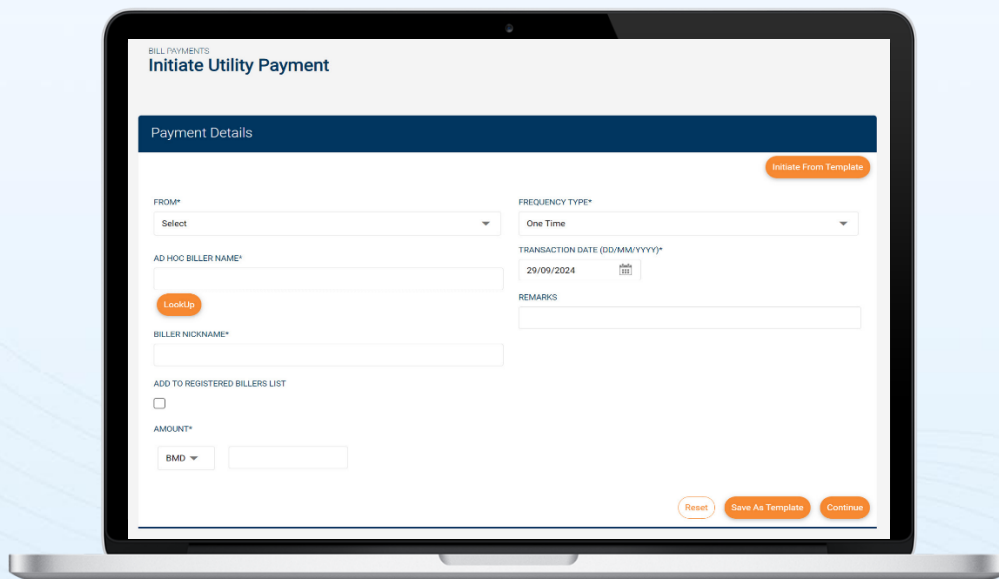
Select the template needed to initiate the payment transaction by using the More Actions menu to the right of each Template.

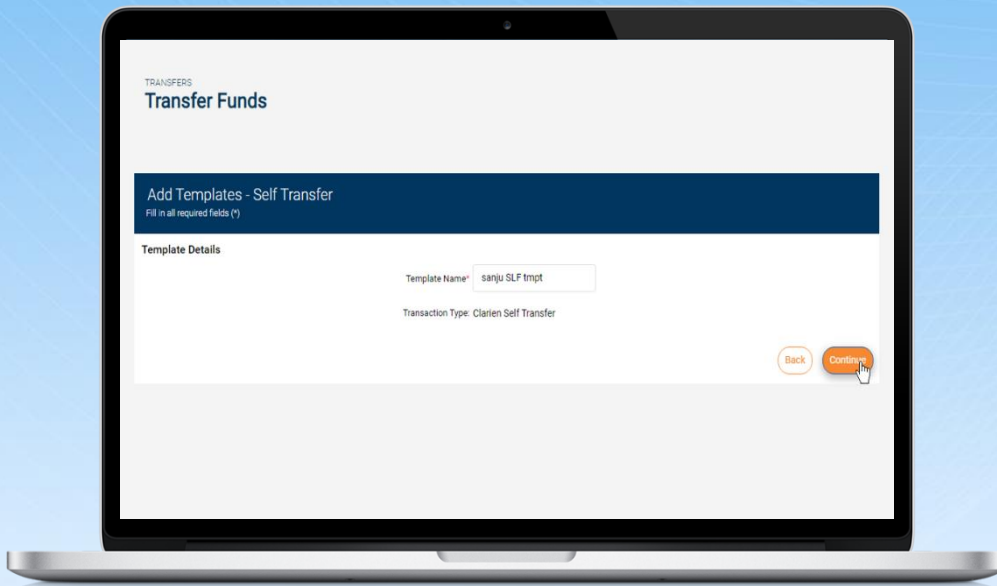


Use the drop-down list to select the account you will pay from.

Then enter the payee nickname or click the Lookup button to see your list of billers. Select the biller. Then, continue entering your payment information.

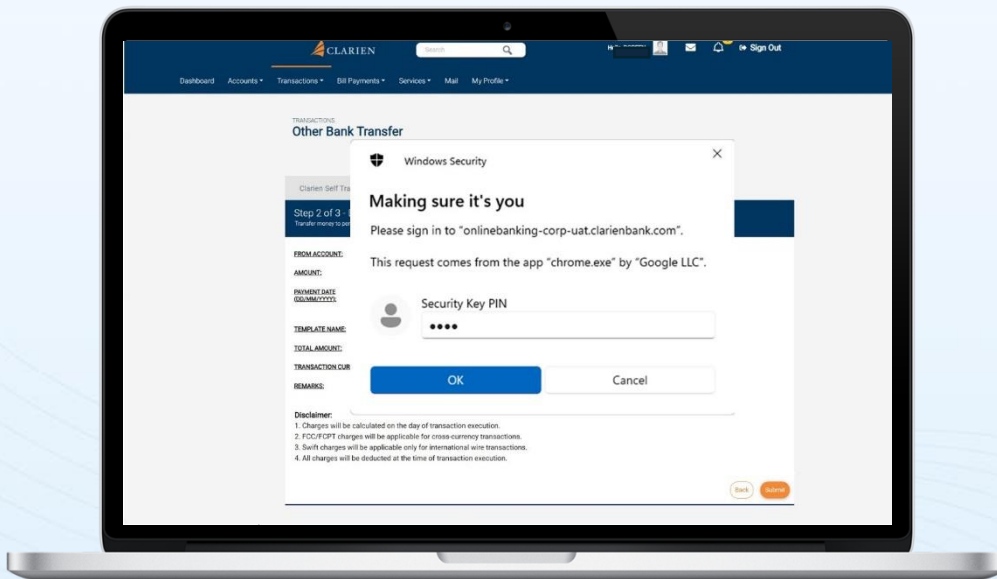
Once complete, either Save as Template for future use, or Continue.





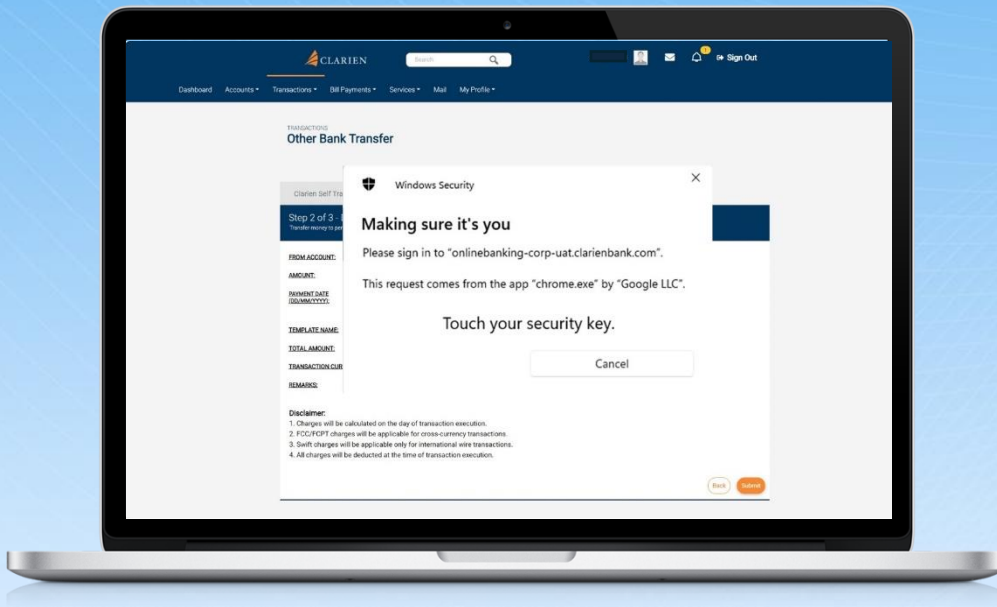
If you selected Save As Template, enter the Template Name, then select Continue.

Confirm your payment details and Submit.

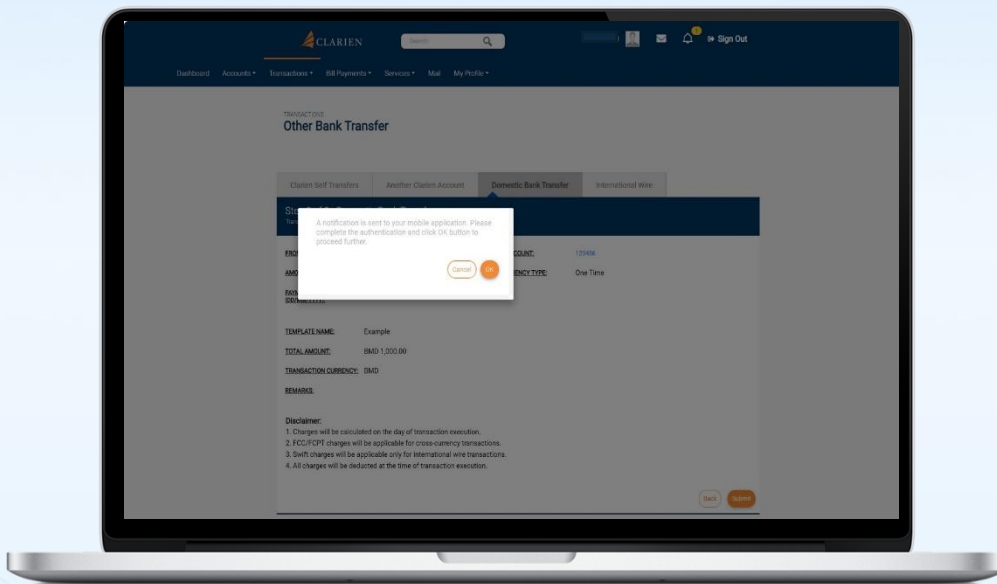


An authentication notification will display on the screen.

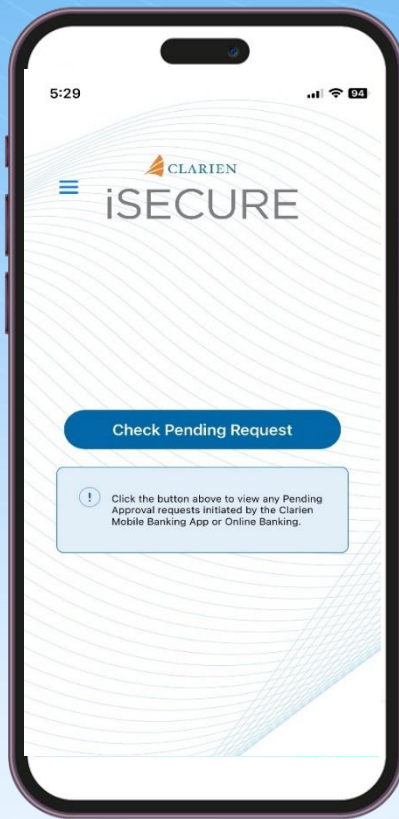
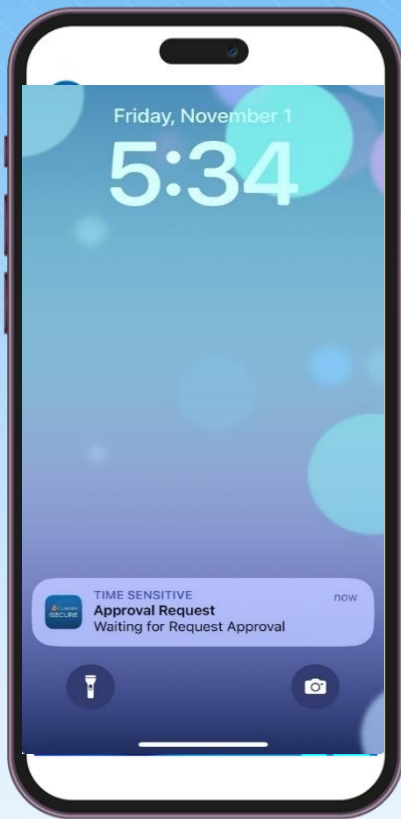
If you are using the Clarien Security Key USB Hard Token, please be sure your device is inserted into a USB port. Enter your Security Key PIN, then select OK.



You will then be prompted to touch your security key. Simply touch the edge of the device with the tip of your finger.

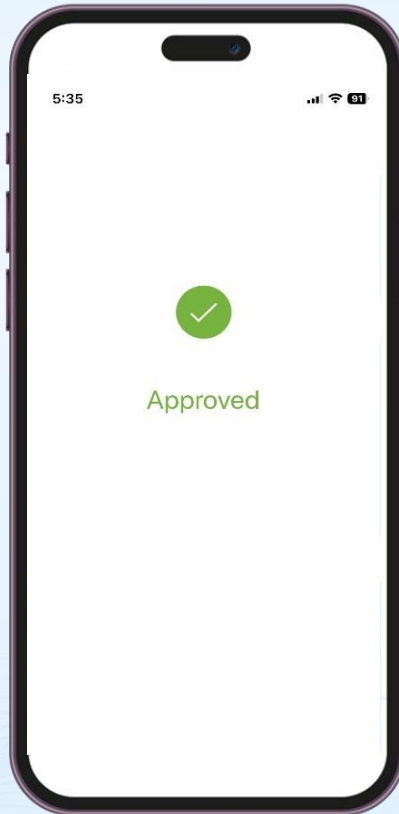
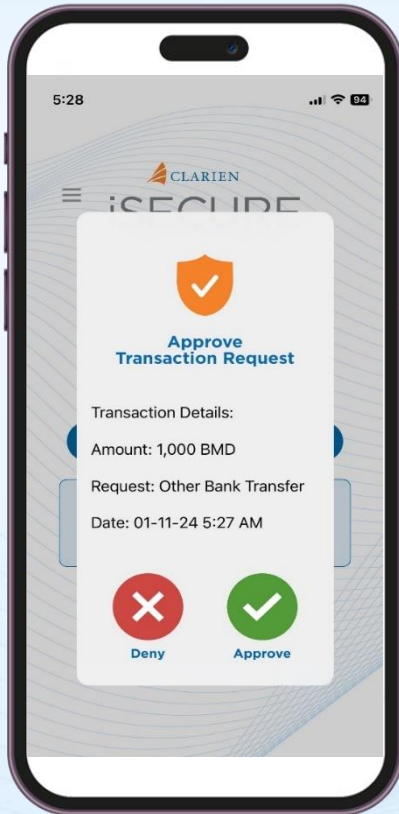


If you are using the iSecure soft token authenticator, your notification will advise you to check your mobile app.



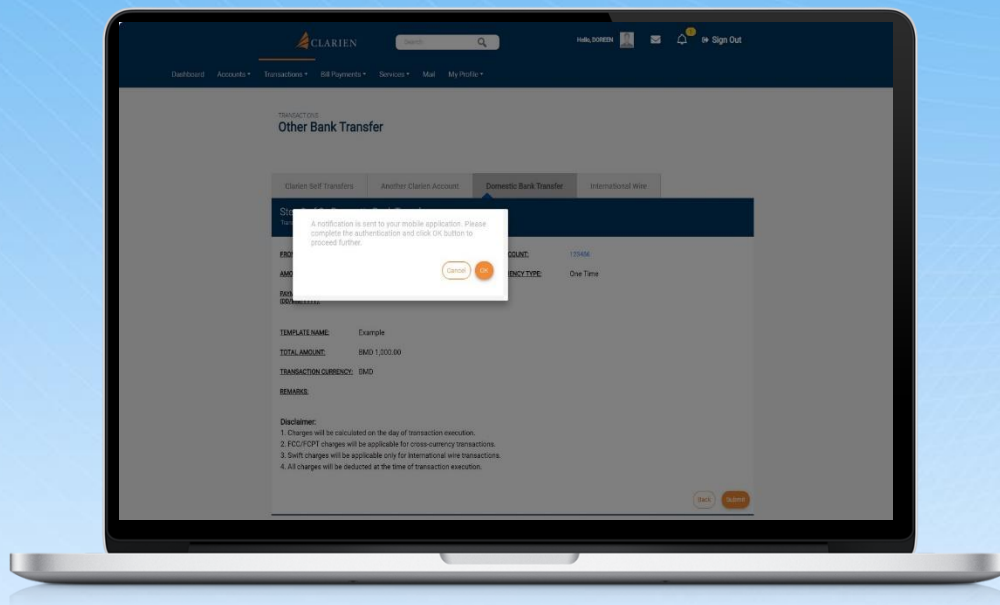
Click on the iSecure notification on your mobile device screen, which will open the iSecure app.

Then, click on the Check Pending Request button.



Review the Transaction Request details. If correct, select Approve.

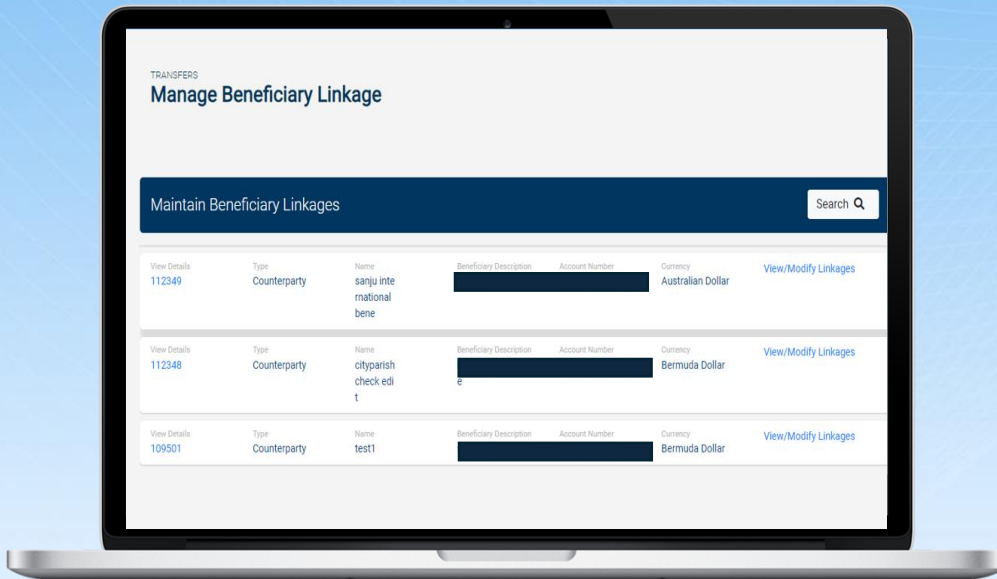
iSecure will confirm your approval.



Return to your laptop or desktop and select OK to proceed.

Your utility payment has now been initiated. View All Transactions to see the status of your payment.

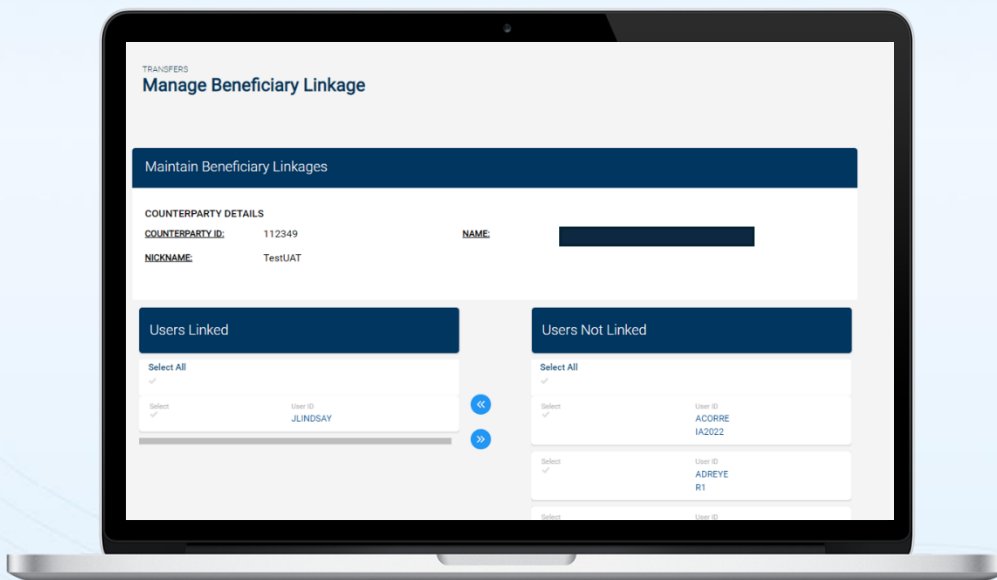
## MAINTAIN BILLER LINKAGES



Select Manage Beneficiary Linkage from the Transactions Menu. Your Beneficiaries List will display.

Click on the ID number to the left of each beneficiary for details.

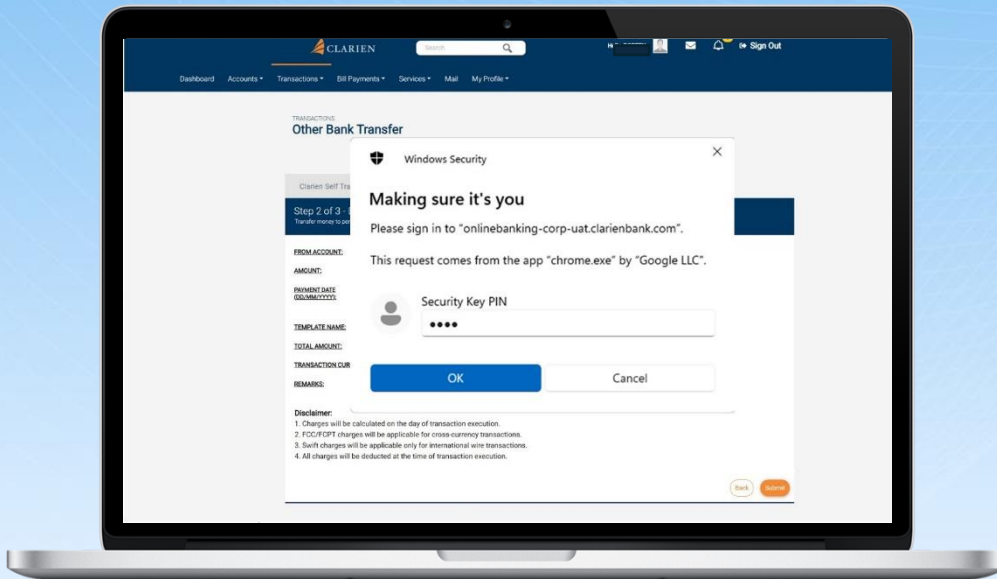
Click on the View/Modify Linkages link to manage the beneficiary linkages.



You'll see two columns detailing which Users are linked and which are not to the beneficiary.

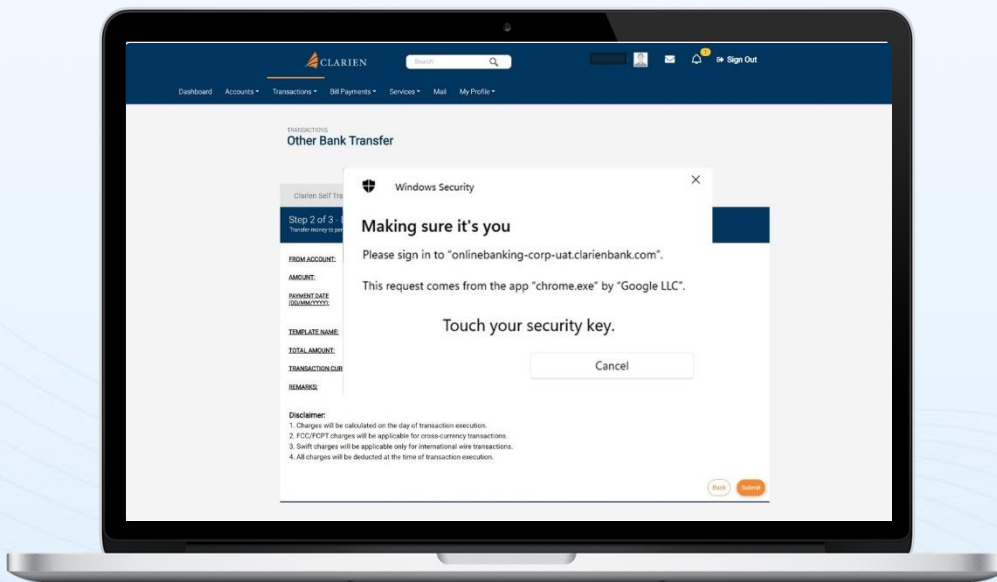
Click the Select check mark to the left of each User, then click on the blue arrows in the middle to move a User from one list to another. You may also click on Select All to move an entire list of Users from one column to the other.

Once complete, Submit your updates.

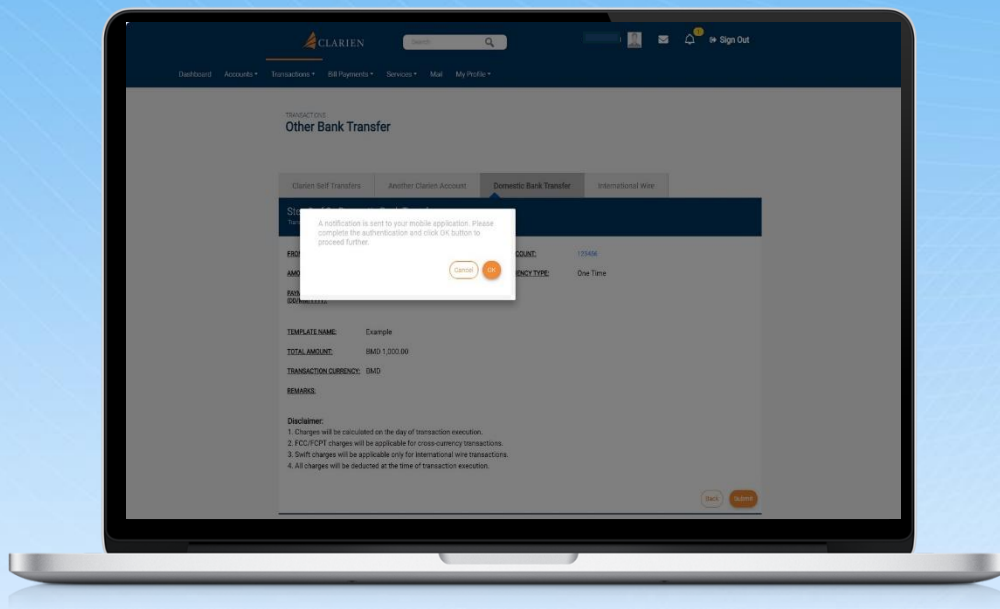


An authentication notification will display on the screen.

If you are using the Clarien Security Key USB Hard Token, please be sure your device is inserted into a USB port. Enter your Security Key PIN, then select OK.



You will then be prompted to touch your security key. Simply touch the edge of the device with the tip of your finger.

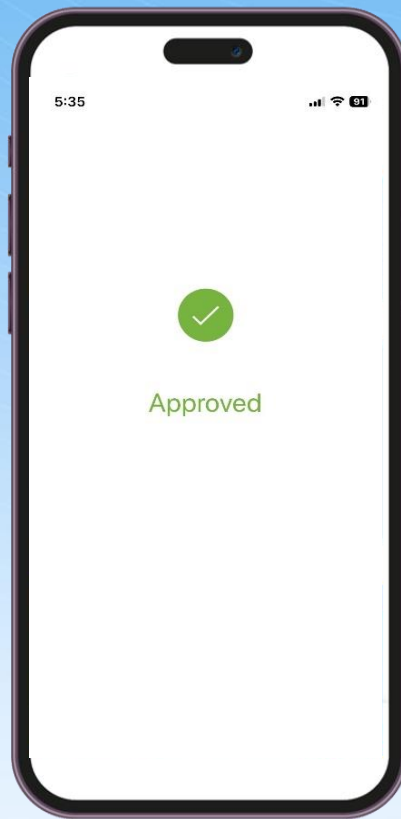
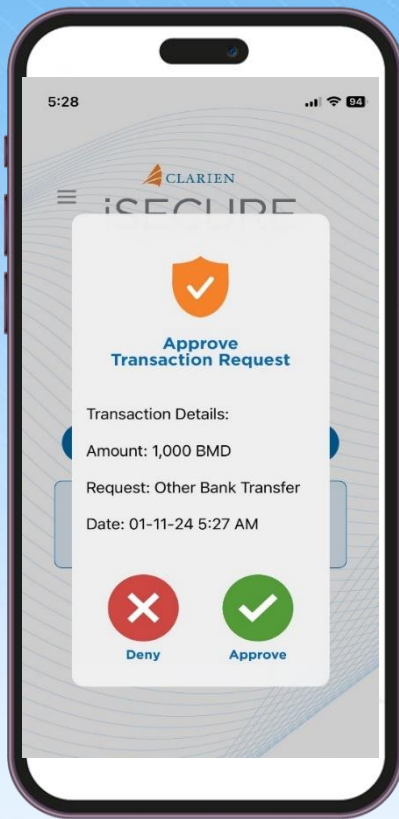


If you are using the iSecure soft token authenticator, your notification will advise you to check your mobile app.



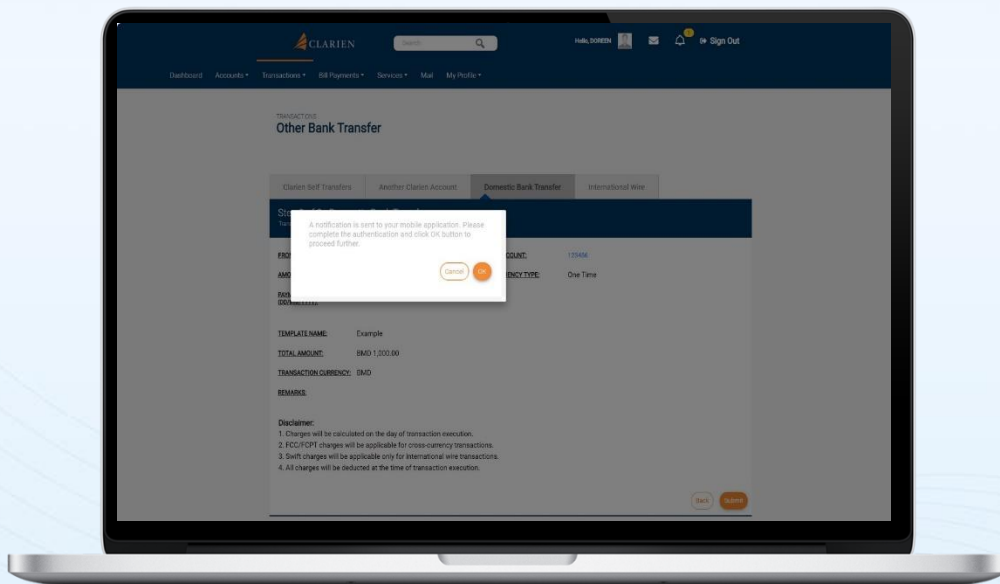
Click on the iSecure notification on your mobile device screen, which will open the iSecure app.

Then, click on the Check Pending Request button.



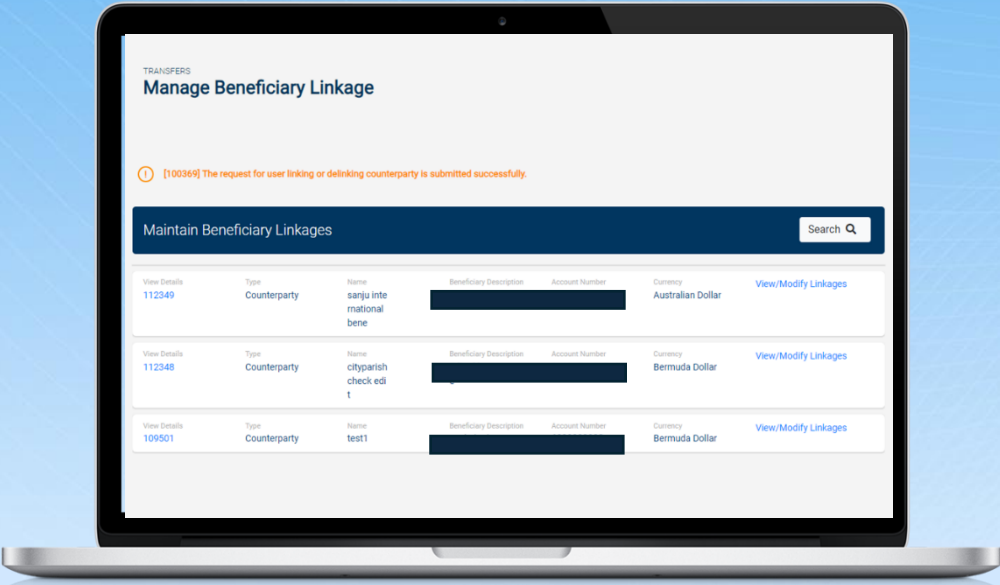
Review the Transaction Request details. If correct, select Approve.

iSecure will confirm your approval.



Return to your laptop or desktop and select OK to proceed.

Your utility payment has now been initiated. View All Transactions to see the status of your payment.



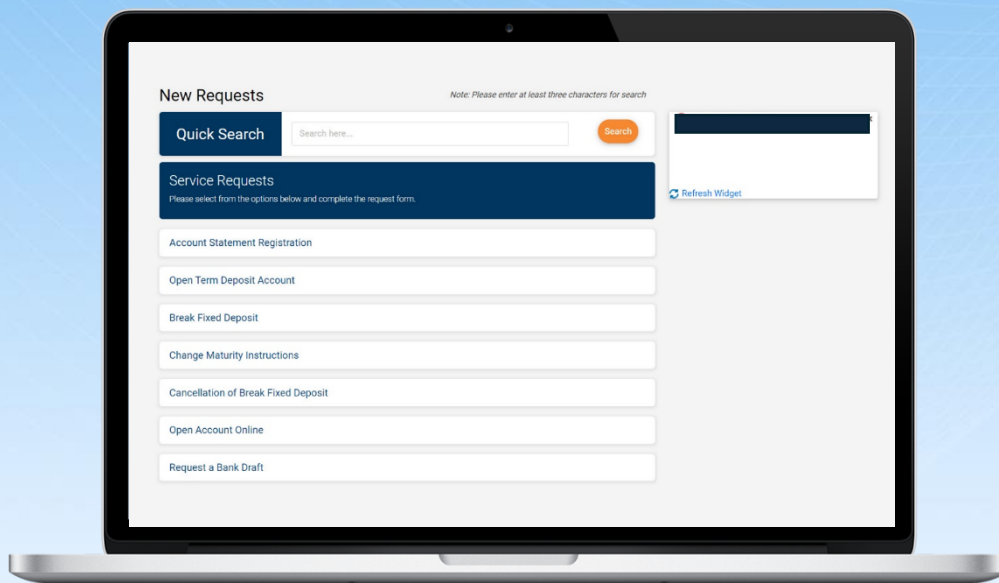
Your User Linkage request has been updated. A notification message will appear above your Beneficiary Linkages list.

## SERVICE REQUESTS

Select Support Services from your Dashboard Menu. A list of available requests will display.

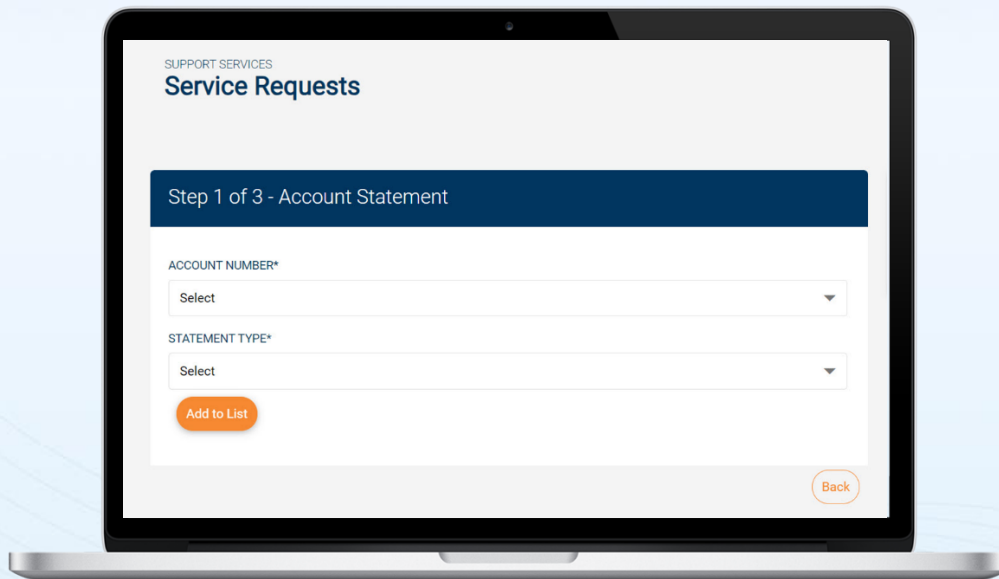
At the top of the page, you can quickly locate a service by using the Search feature.

Enter the key words of the service you need in the Quick Search box. Related services will automatically display.



For Account Statement Registration, use the drop-down menu to select the Account Number.

Then, select your preferred Statement Type from No Statement, Statement, Passbook, Statement and Passbook. Once complete, select Add to List to submit your request.





The screenshot shows a web form titled "Step 1 of 3 - Break Fixed Deposit". The form is divided into several sections:

- ACCOUNT DETAILS:** Includes a "DEPOSIT ACCOUNT\*" dropdown menu with "Select" as the current option. A "View Details" button is located below the dropdown.
- BREAKING DETAILS:** Includes an "AMOUNT TO BE BROKEN\*" text input field and a "BREAKING VALUE DATE (DD/MM/YYYY)\*" date picker.
- TRANSFER PROCEEDS TO\*:** Includes an "Account" dropdown menu with "Select" as the current option.
- TRANSACTION REMARKS:** A section at the bottom for additional notes.

A "Refresh Widget" button is visible on the right side of the form.

To Break a Fixed Deposit, select your Deposit account from the drop-down list.

Enter the amount you would like to break, and the date.

Tell us where to transfer the funds by selecting an account from your drop-down list.

You must then agree to the Terms and Conditions, then submit your request.

The screenshot shows a web form titled "Term Deposit Account". The form is divided into several sections:

- MATURITY INSTRUCTIONS:** Includes a "DEPOSIT ACCOUNT\*" dropdown menu with "Select" as the current option.
- Change in Tenor:** Includes a radio button selection for "Change in Tenor". Below this are "Renew Months" and "Renew Days" text input fields.
- Renew Maturity Amount:** Includes a radio button selection for "Renew Maturity Amount".
- Renew additional Maturity Amount:** Includes a radio button selection for "Renew additional Maturity Amount".

An "Error Loading" message and a "Refresh Widget" button are visible on the right side of the form.

To change maturity instructions, begin by selecting your deposit account. Then, change the tenor, or length, of your deposit account by entering updated renewal months and days. If you'd like to renew an additional maturity amount, enter the amount, then select your debit account from the drop-down menu. You can also close your account or renew your withdrawal.

**Term Deposit Account**

**MATURITY INSTRUCTIONS**

DEPOSIT ACCOUNT\*

Select

**Change in Tenor**

☒ Change in Tenor

Renew Months

Renew Days

**Renew Maturity Amount**

☐ Renew Maturity Amount

**Renew additional Maturity Amount**

☐ Renew additional Maturity Amount

Refresh Widgets

Finally, you may change your product by adjusting the tenor months and days and selecting a new Term Deposit product code including Term Deposit Half Yearly, Monthly, Quarterly, Yearly, and Premium at Maturity. Be sure to review the applicable fees. Then, submit your request.

**SUPPORT SERVICES**

**My Requests**

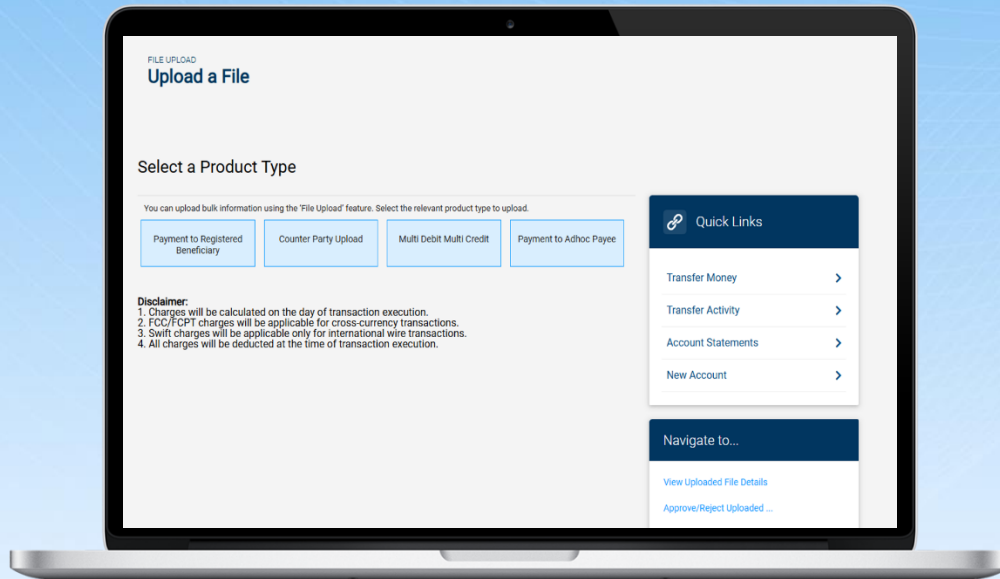
My Requests Search New Service Request

| Reference ID | Request Date | Entered By | Request Type | Request Status |  |
|--------------|--------------|------------|--------------|----------------|--|
| 1501         | 10/07/2024   |            |              | Recalled       |  |
| 1229         | 26/06/2024   |            |              | Closed         |  |
| 1228         | 26/06/2024   |            |              | Recalled       |  |
| 1227         | 26/06/2024   |            |              | Rejected       |  |
| 1226         | 26/06/2024   |            |              | Pending        |  |

Page Number 100 Rows per page: 5 1 - 5 of 16

View all your requests by selecting My Requests from the Services menu.

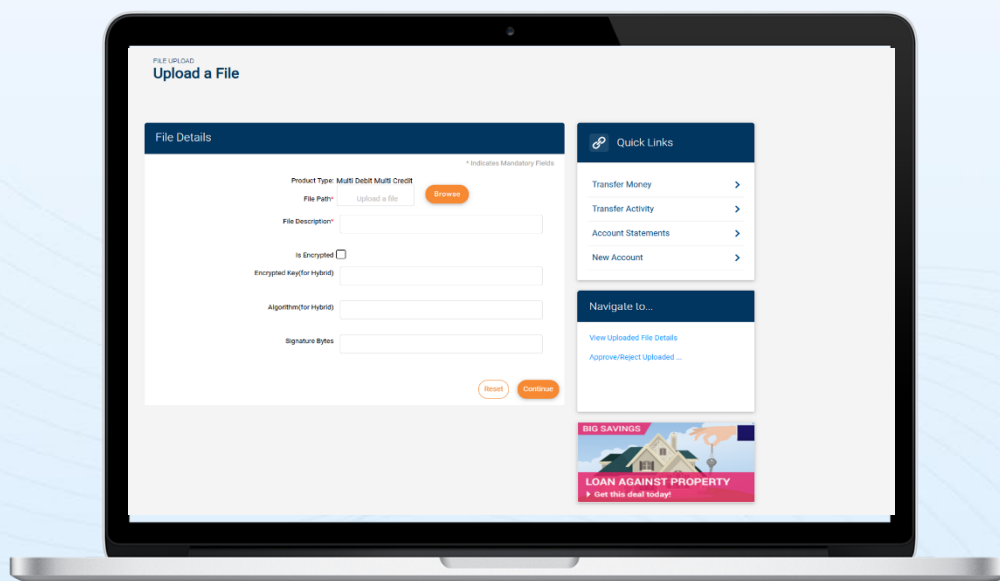
## UPLOAD A FILE



Select Upload a File from the File Upload menu.

Click on the file type you would like to upload:

- Counter Party Upload is for uploading Clarien, other local banks, and international beneficiaries.
- Payment to Ad-hoc Payee is used for common file upload to payees who have not been saved as a beneficiary. Each record will be debited as a single transaction.
- Multi Debit Multi Credit file uploads to payees who have not been saved as a beneficiary. All records in the file will be debited as one consolidated transaction.
- Payment to Registered Beneficiary (Common File) uses a unique beneficiary ID that can be located under the Transfer Manage beneficiary Tab. The beneficiary ID would be used in the file format to pull the beneficiary account details. Each record will be debited as a single transaction



Click on the browse button to search for the file and enter a file description which cannot be more than 10 characters.

Select Continue.

Enter the file description, then select Continue.

**File Details**

\* Indicates Mandatory Fields

Product Type: Payment to Adhoc Payee

File Path: Common file Marketplace [Browse](#)

File Description: Payroll

Is Encrypted ☐

Encrypted Key(for Hybrid)

Algorithm(for Hybrid)

Signature Bytes

[Reset](#) [Continue](#)

**Quick Links**

- [Transfer Money](#)
- [Transfer Activity](#)
- [Account Statements](#)
- [New Account](#)

**Navigate to...**

- [View Uploaded File Details](#)
- [Approve/Reject Uploaded ...](#)

**BIG SAVINGS**

**LOAN AGAINST PROPERTY**

Get this deal today!

Review the Confirmation screen, then Submit.

**Preview and Confirm**

The file is attached successfully. File Name: [BEN6 v7.txt]

**File Upload Details**

|                         |                      |           |             |
|-------------------------|----------------------|-----------|-------------|
| PRODUCT TYPE            | Counter Party Upload | FILE NAME | BEN6 V7.Txt |
| TOTAL NUMBER OF RECORDS | 2                    |           |             |
| FILE DESCRIPTION        | Beneficiary Upload   |           |             |

**ADDITIONAL DETAILS**

REMARKS

[Back](#) [Submit](#)

**Quick Links**

- [Transfer Money](#)
- [Transfer Activity](#)
- [Account Statements](#)
- [New Account](#)

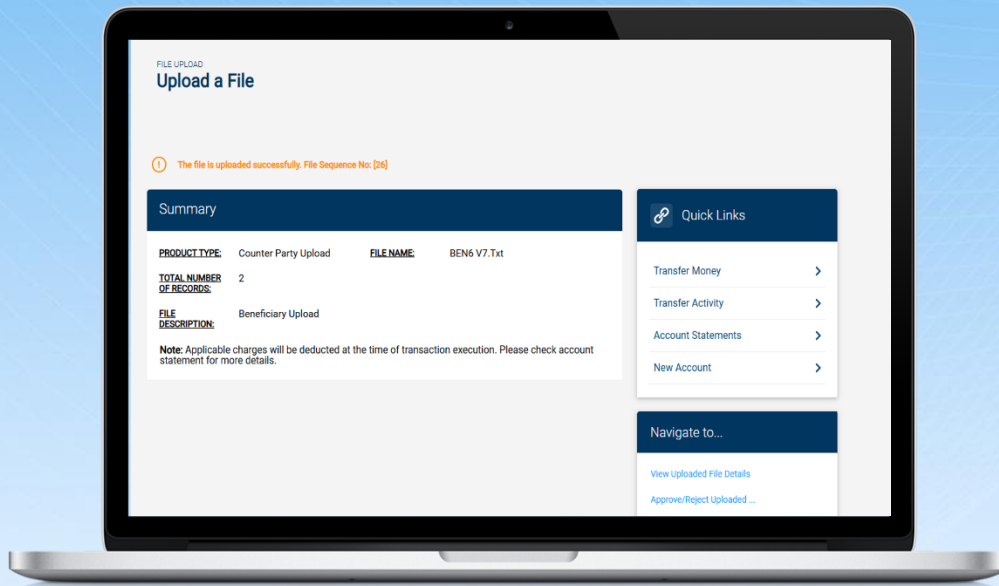
**Navigate to...**

- [View Uploaded File Details](#)
- [Approve/Reject Uploaded ...](#)

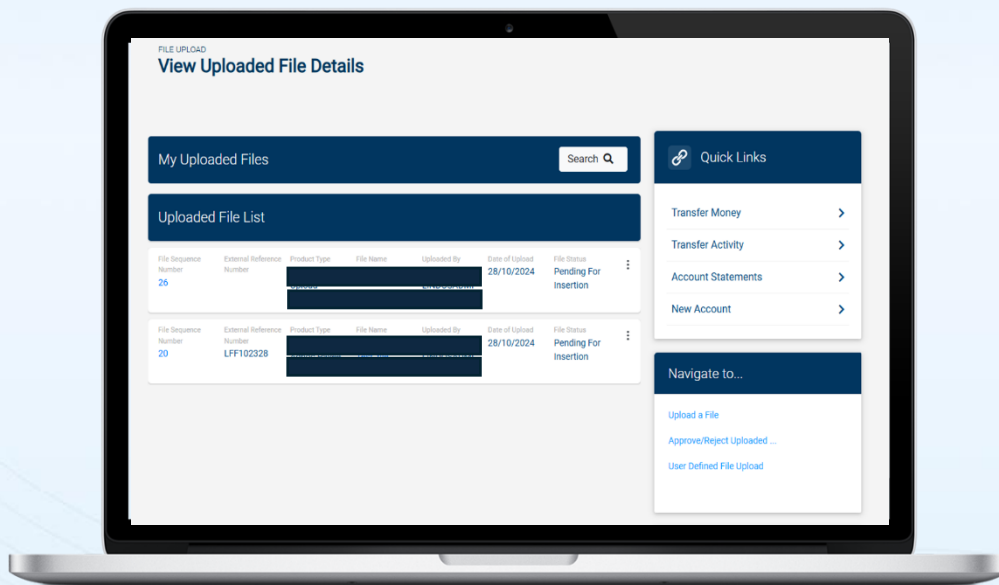
**BIG SAVINGS**

**LOAN AGAINST PROPERTY**

Get this deal today!



If further user approval is required, the user will need to navigate to the File Upload Tab and select Approval/Reject Upload Files.



You can check the status of the file upload by clicking on View Upload Files. You can also get more information by clicking on the File Sequence Number and file name.

- Successfully processed means the file is still not processed and will change to Processing Complete.

Note: Further approval may be required depending on your user permission. Please check the Transfer Tab, View Approval Queue to ensure no further approval is required after checking the status has changed to Processing Complete under the File Upload, View Upload File details.

## USER ROLE MAINTENANCE

**User Role Maintenance** may be selected from the Corporate Admin menu.

Use the Search button to search by Role hierarchy or role name.

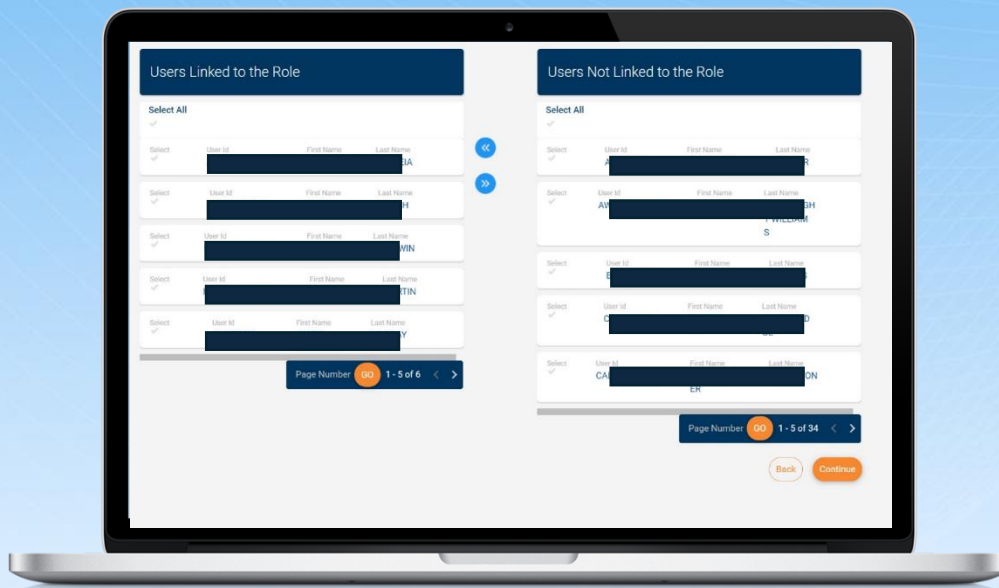
Or select from the list below by Role Name.

The screenshot shows a web application interface for 'User Role Maintenance'. At the top, there is a search bar with a magnifying glass icon. Below the search bar, there are four input fields: 'Bank ID' (containing 'CAGPBM'), 'Corporate ID' (empty), 'Corporate Name' (empty), and 'Role Hierarchy' (empty). To the right of these fields is a 'Role Name' input field. At the bottom right of the form area, there are two buttons: 'Clear' and 'Search'. Below the form, there is a table with four rows of role information:

| Role Name | Role Hierarchy |   |
|-----------|----------------|---|
| GROUP1    | 10             | ⋮ |
| GROUPC    | 20             | ⋮ |
| GROUPB    | 30             | ⋮ |
| GROUPA    | 0              | ⋮ |

The screenshot shows the 'Edit Role' interface. At the top, it says 'CORP ADMINISTRATION' and 'User Role Maintenance'. Below this is a form with the following fields: 'BANK ID' (CAGPBM), 'CORPORATE ID' (empty), 'CORPORATE NAME' (empty), 'ROLE NAME' (GROUP1), and 'ROLE HIERARCHY' (10). Below the form, there are two panels: 'Users Linked to the Role' and 'Users Not Linked to the Role'. Each panel has a 'Select All' button and a list of users with columns for 'User ID', 'User Name', and 'Last Name'. The 'Users Linked to the Role' panel shows three users, and the 'Users Not Linked to the Role' panel shows one user.

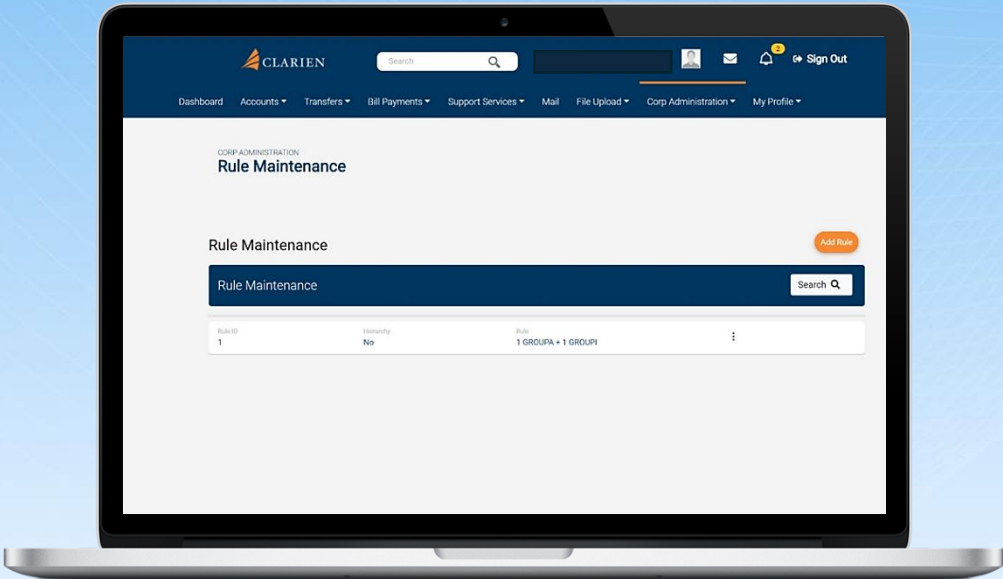
The Role details will display, followed by a list of users who are linked and not linked to the role.



To update user linkage, select the check mark to the left of a user, or multiple users, to change whether they are linked or not to the role. Or you may select all at the top of the list. Use the blue arrows to move users between the two lists.

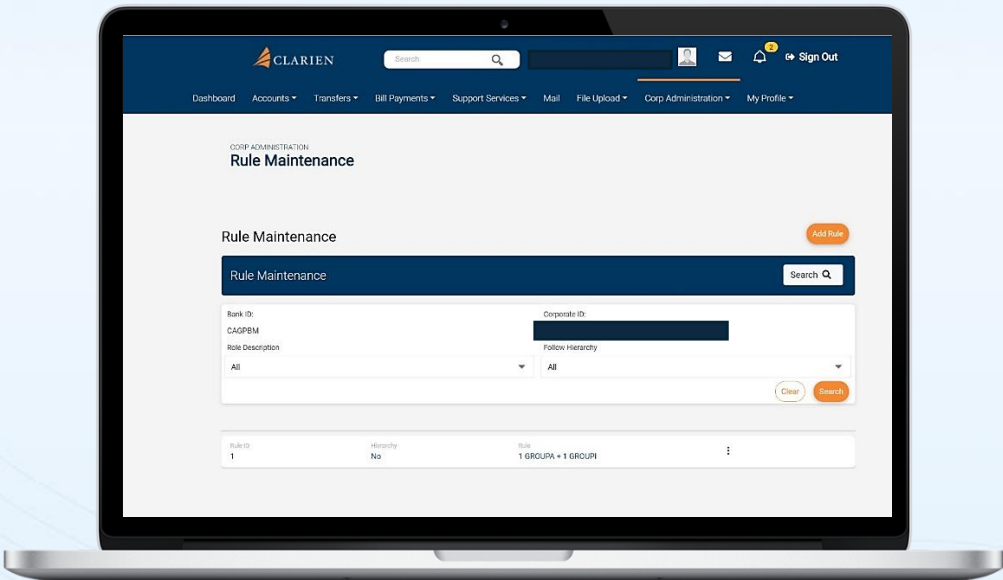
Select continue to update your User Roles.

RULE MAINTENANCE



When you select Rule Maintenance from the Corporate Admin menu, a list of rules associated with your Corporate ID will display.

Use the More Actions menu, the three dots located to the right of each rule, to make edits.



Click on the Search button to locate a specific Rule by selecting the Rule description and hierarchy.

To create a new Rule, select the Add Rule button located above the Rule list.

COMP ADMINISTRATION  
**Rule Maintenance**

**Add Rule**

**BANK ID:** CAGPBM

**CORPORATE ID:**

**Select Roles**

| Rule Description | Rule Hierarchy | Number Of People     |
|------------------|----------------|----------------------|
| GROUPA           | 0              | <input type="text"/> |
| GROUPB           | 30             | <input type="text"/> |
| GROUPC           | 20             | <input type="text"/> |
| GROUPD           | 10             | <input type="text"/> |

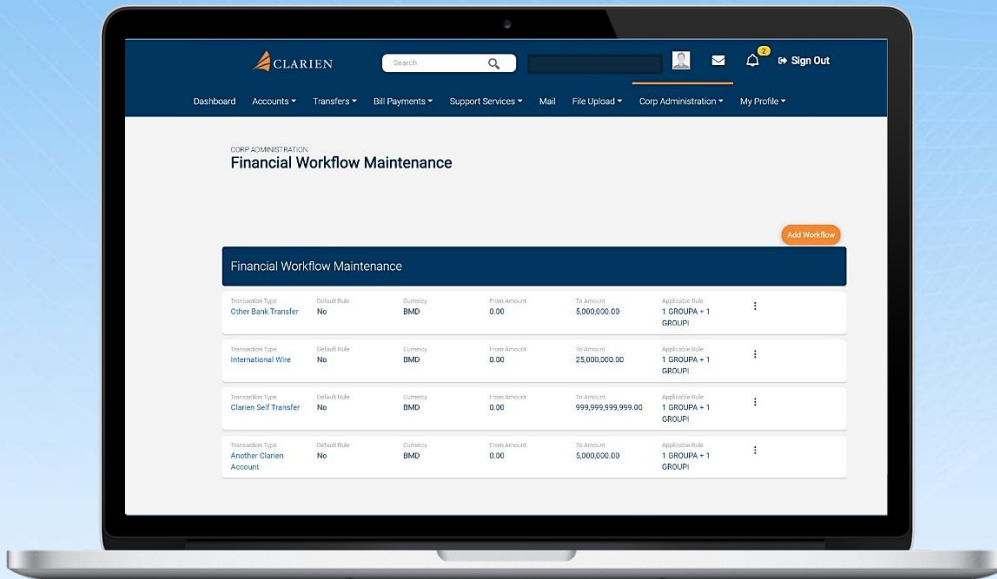
[Back](#) [Clear](#) [Continue](#)

Then, select the Role details for the new Rule. Click on Continue to review your new Rule and confirm.

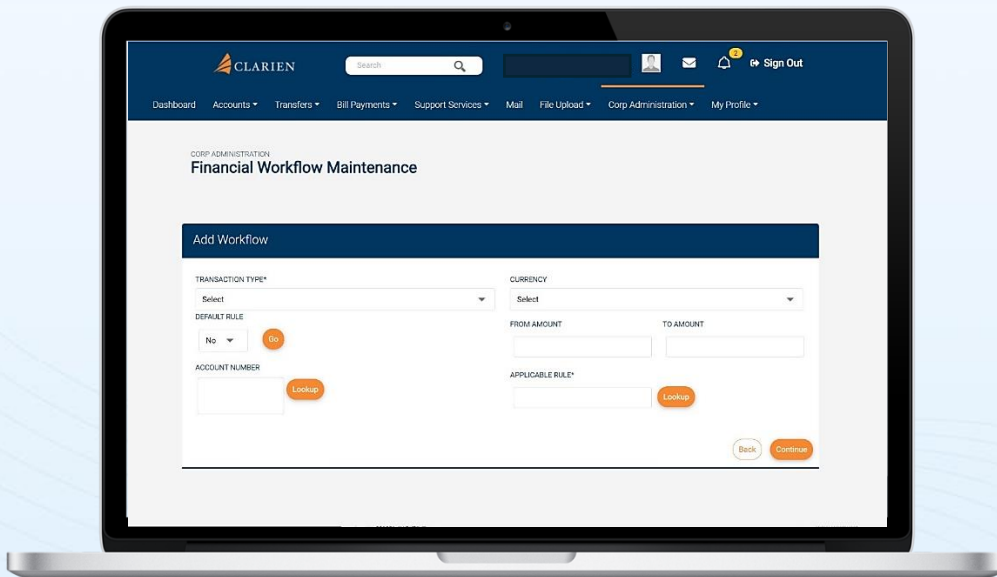
## FINANCIAL WORKFLOW MAINTENANCE

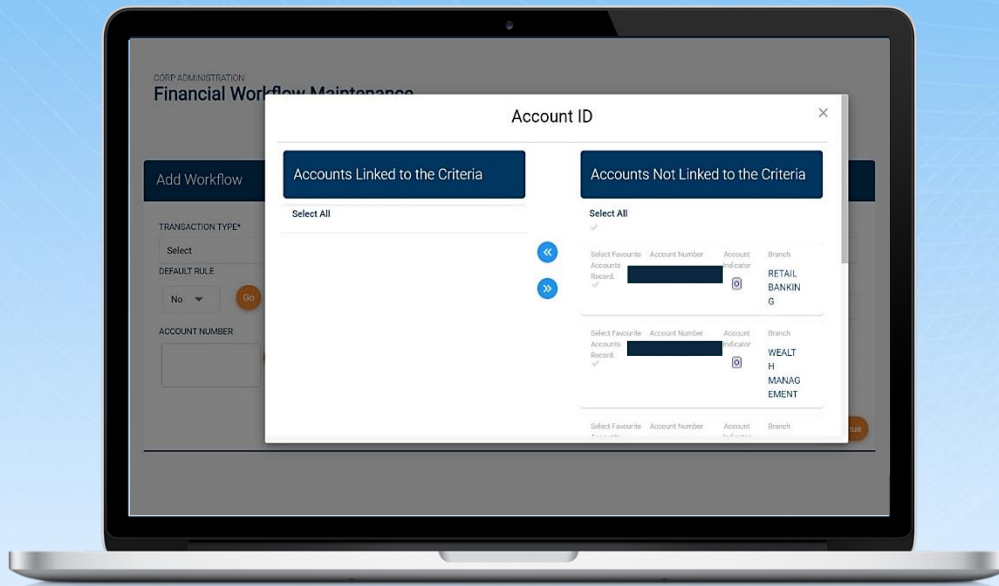
When selecting the Financial Workflow Maintenance, your current financial workflow details will display.

Add a new Workflow by selecting the Add Workflow button above the list.



Then, enter the new Workflow details including the Transaction Type, the default Rule, the account number, the currency, to and from amounts and applicable rules.

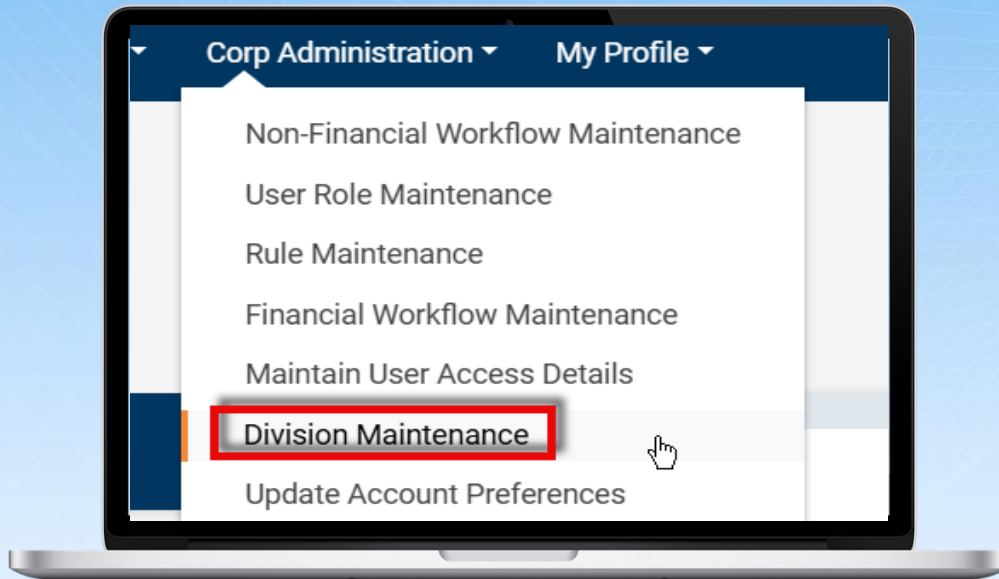




Select Account Number Lookup to view the accounts linked to the criteria.

You may move the accounts between the Accounts Linked and Not Linked lists by selecting the check mark to the left of the account, or the Select All option at the top of the list to move all of the accounts.

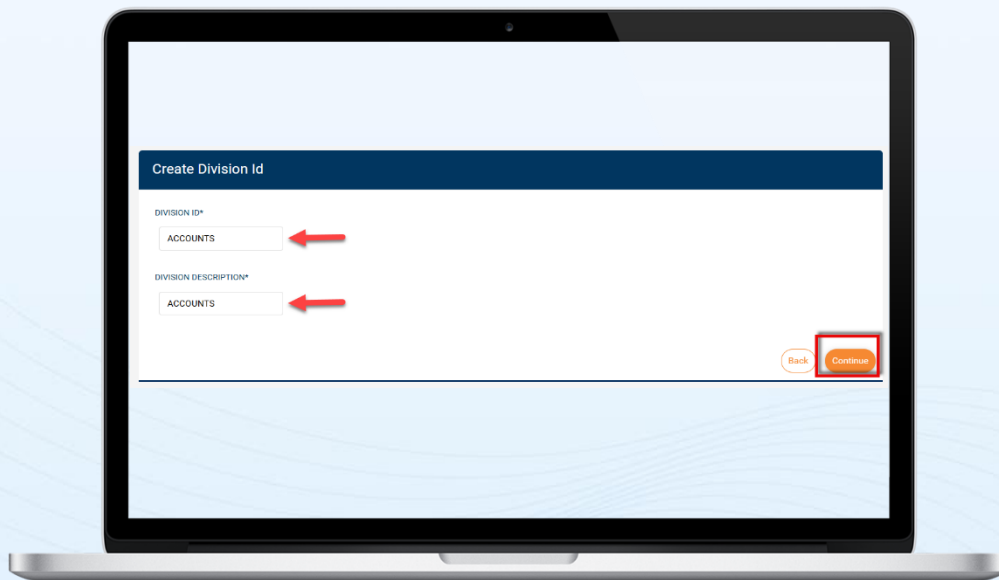
## DIVISION MAINTENANCE



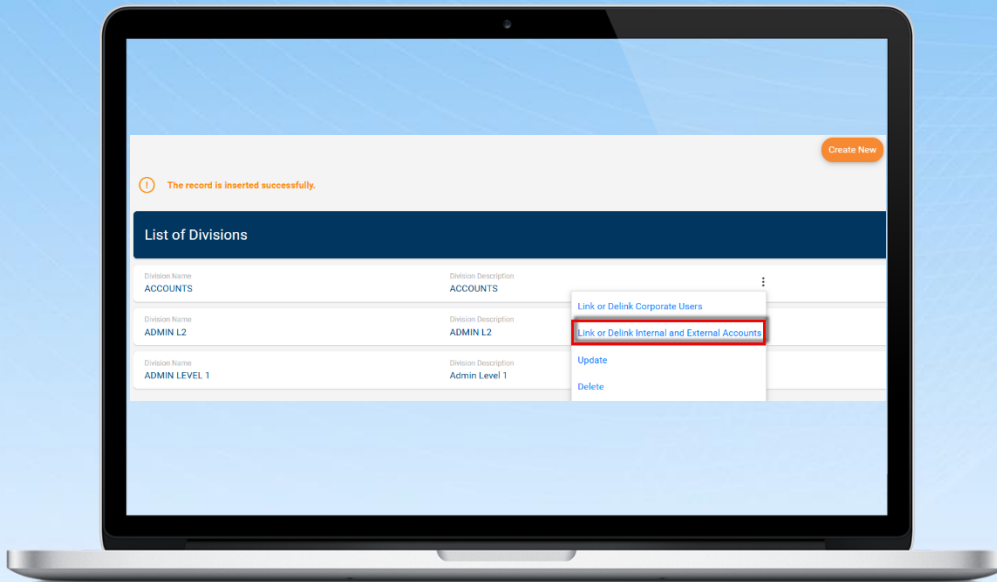
Divisions allow administrators to give users or groups of users access to specific accounts only.

Select Division Maintenance from the Corp Administration dropdown menu.

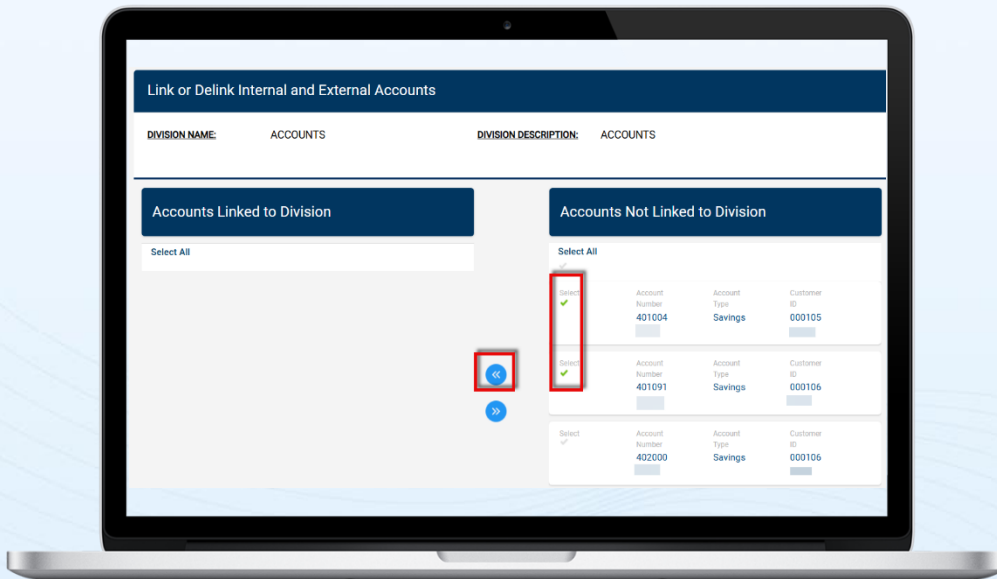
To create a new division, click the Create New button.



Complete the required fields, then click Continue. Confirm the Divisions details and Submit.

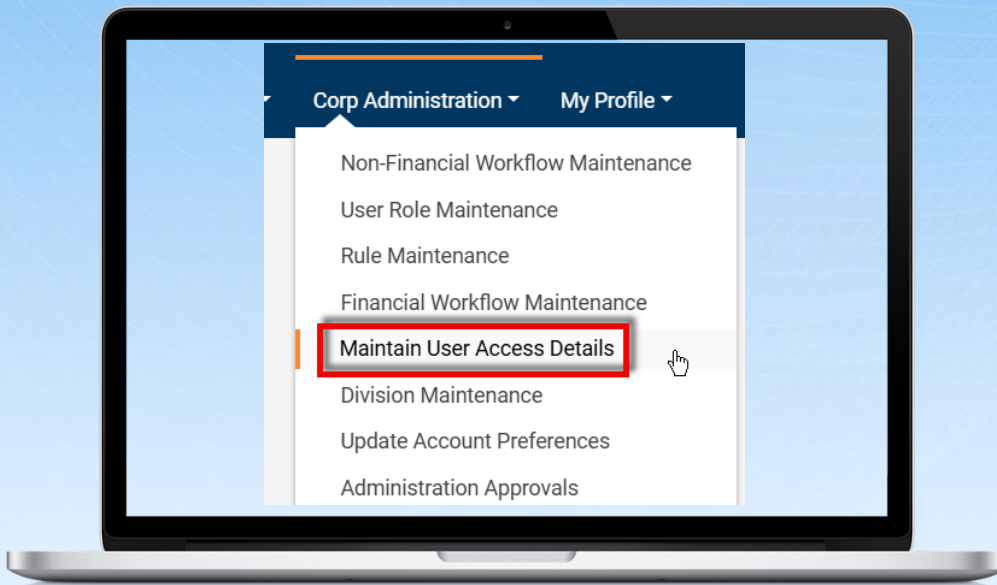


Select Link or Delink Internal and External Accounts in order to link the required accounts to a division.



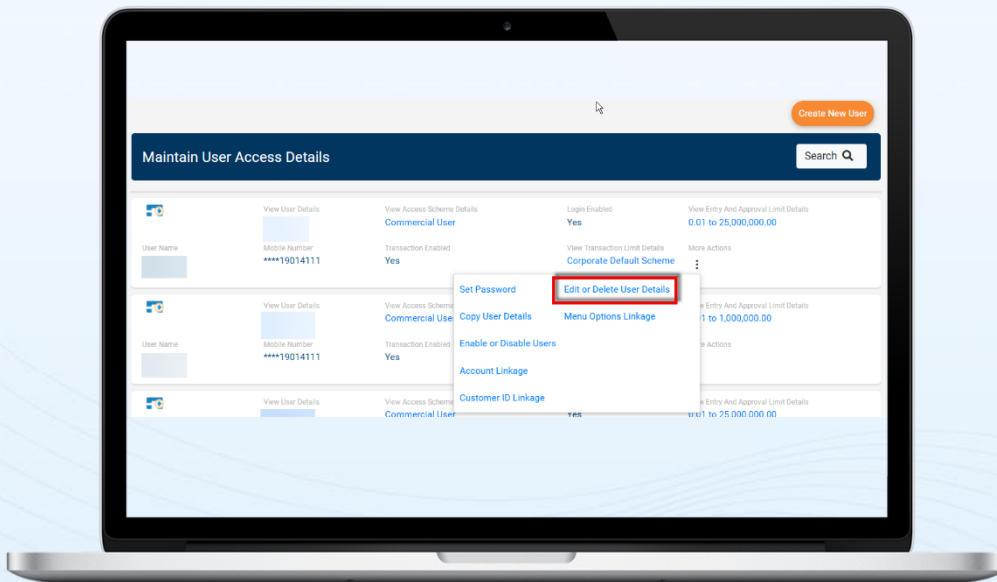
Find the accounts and click on the tick under the Select for each account.

Then, click on the blue arrow facing the left to move them to the Linked side. Click Continue then Submit which is at the bottom of the page.

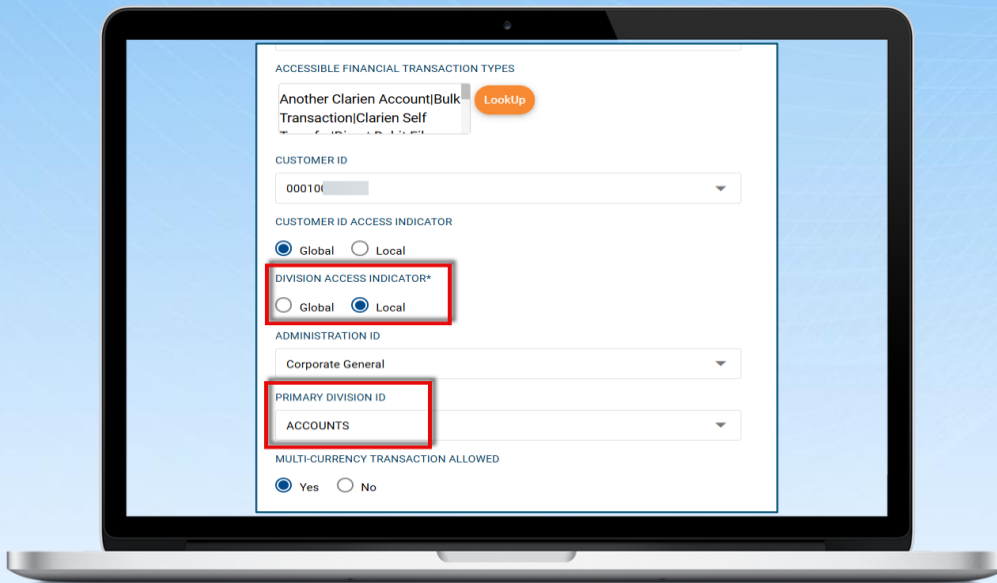


Go to Maintain User Access Details within the Corp Administration drop-down.

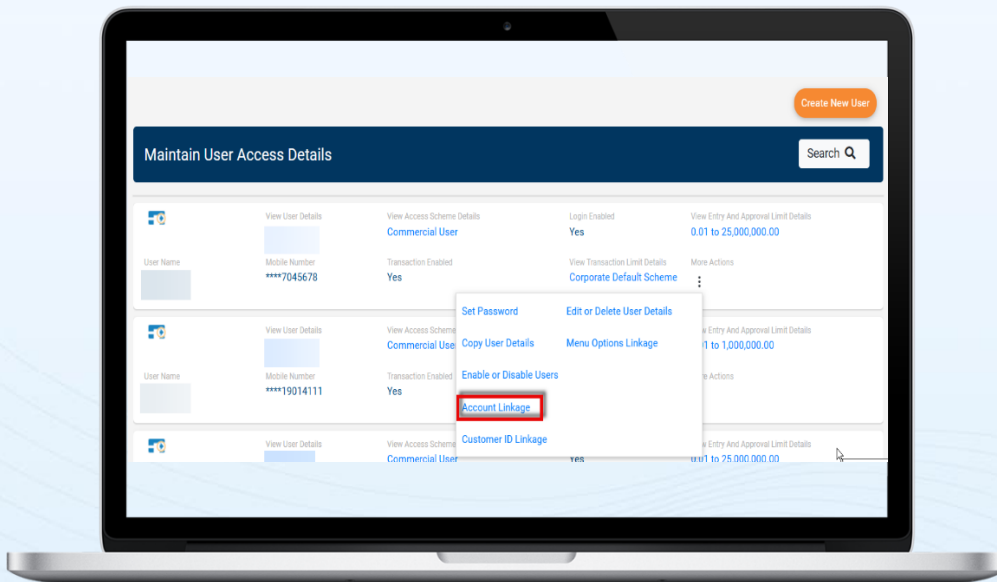
These steps will allow the administrator to link the newly created division to a user.



Locate the required user and select Edit or Delete User Details from the More Actions 3 dots.



Change the Division Access Indicator to 'Local'. Select the division name from the Primary Division ID dropdown, then submit the changes.



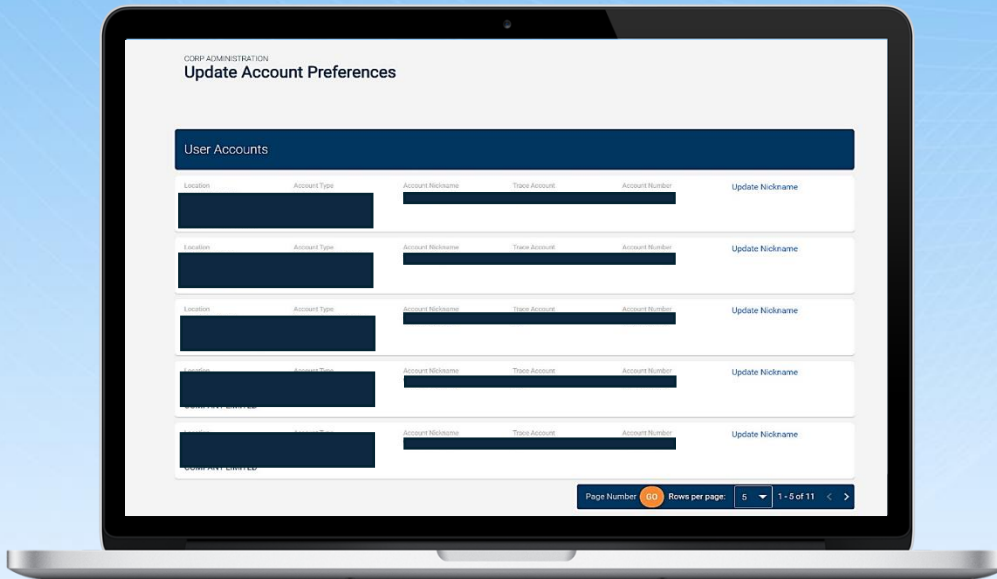
Check the user's account access by clicking on Account Linkage.

This option will allow the administrator to control the level of access to the designated accounts and ensure that the correct division accounts were assigned to the user.

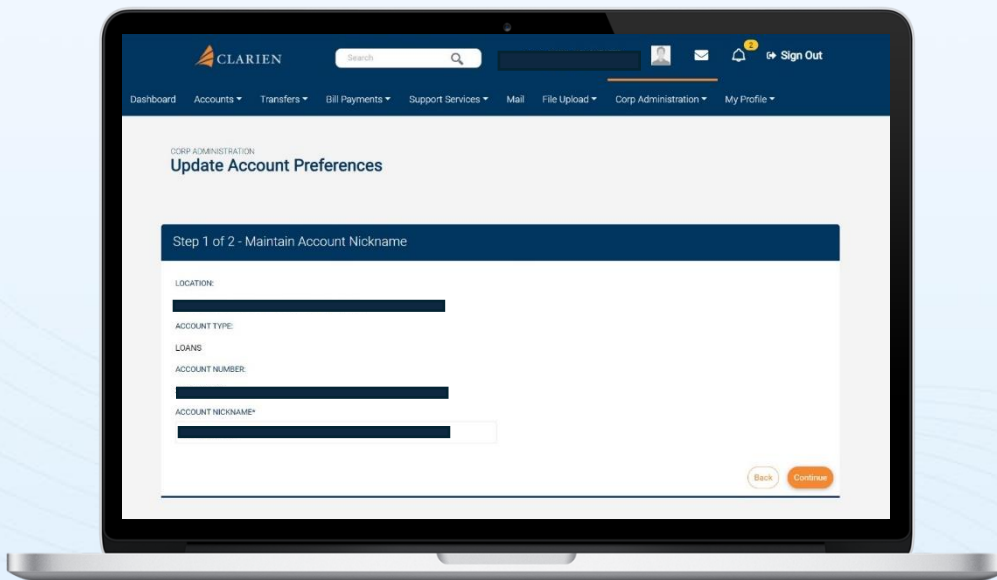
## UPDATE ACCOUNT PREFERENCES

Select Account Preferences from the Corporate Admin menu. Your list of User Accounts will display.

Click on Update Nickname, available to the right of each account.



Then, enter the new nickname at the bottom and select Continue to review and confirm your update.

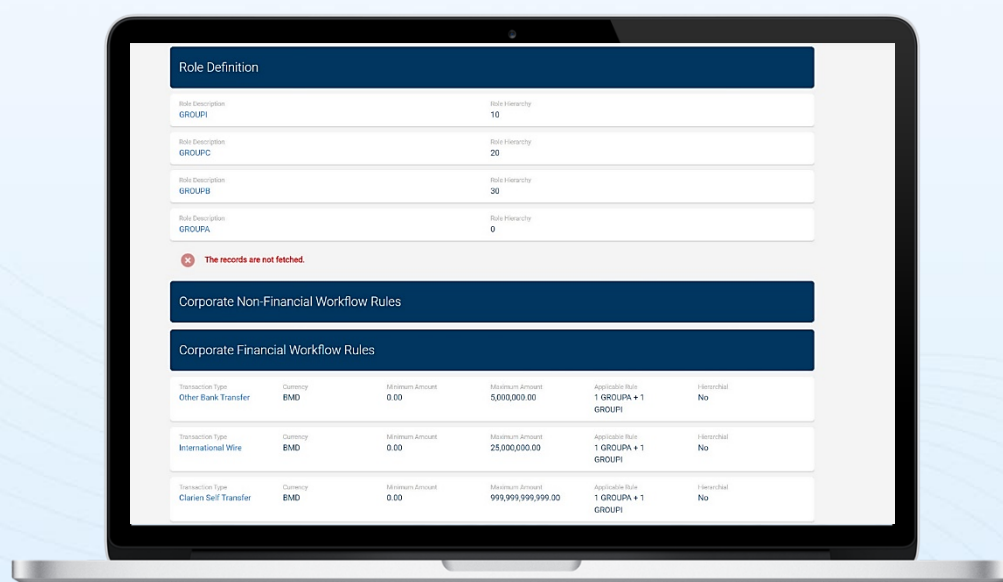
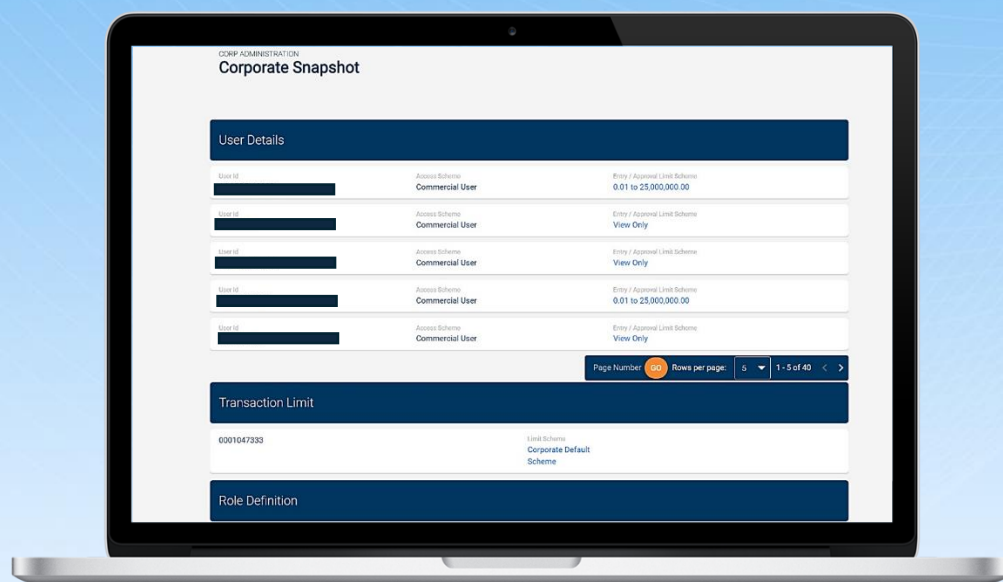


## CORPORATE SNAPSHOT

Get a comprehensive view of your Corporate Account by selecting **Corporate Snapshot** from the Corporate Admin menu.

View your User Details, including User IDs, and their Access Scheme and Entry / Approval level schemes. Use the arrows below the list to view additional Users.

You can also view the Corporate Default Scheme for your account transaction limit.



Then, view Role descriptions and hierarchy, as well as your financial and non-financial workflow rules.

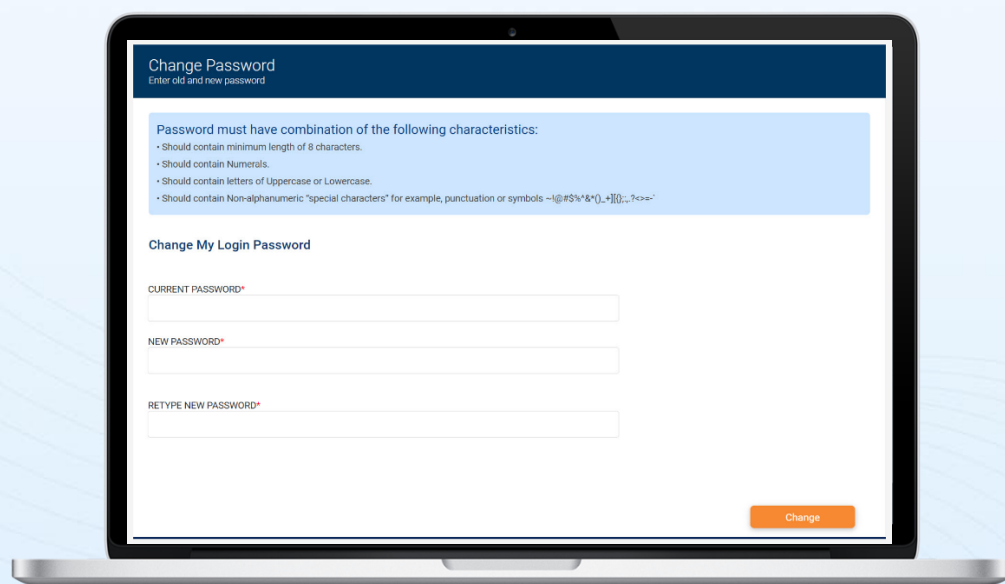
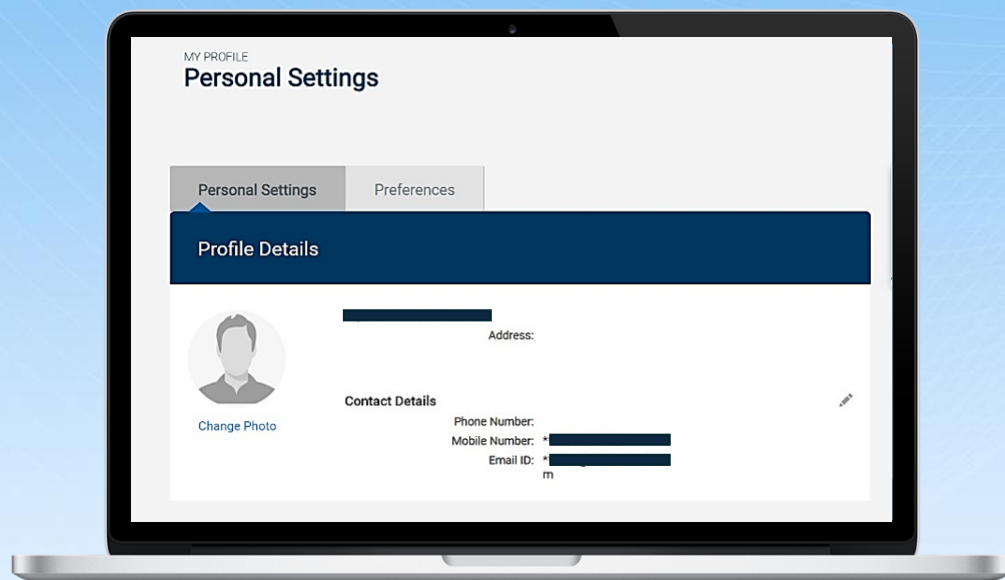
If you have any questions regarding your account, please speak with your Relationship Manager.

## MY PROFILE

Select **My Profile** from your top menu. Here you will see your Personal Settings, which includes your profile details.

Update your profile photo here as well. Simply click on the Change Photo link, located in the Edit Profile Photo section on the right of the page.

Then, select Browse to locate your photo on your device. Acceptable file formats are listed, and your photo must exceed 1 megabyte in size. Click submit and your photo will automatically update.



Select Change Password in the My Profile menu to make password updates. You'll enter your old password first, then your new password. Your password should contain a minimum length of 8 characters, numbers, upper and lowercase letters and non-alphanumeric "special characters". Re-enter your new password to confirm. Select Change to complete your update.

You may also change your password by selecting Security Settings from the My Profile menu.

Thank you for entrusting Clarien with your Commercial banking needs.

**About Clarien Bank Limited**

Clarien Bank Limited (“Clarien Bank”) provides personal & commercial banking, private banking, investments and corporate banking to individuals, families and corporations in Bermuda and worldwide. Clarien Bank is one of the largest independent integrated financial services organisations in Bermuda. Clarien Bank Limited through its subsidiary companies is licensed to conduct banking, investment, corporate services and trust business by the Bermuda Monetary Authority.



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