



FIRST STEPS ONCE YOU'VE LOGGED IN TO TRUE BLUE ONLINE® BUSINESS

Once you've successfully set up Secure Browser and are into True Blue Online® Business for the first time, get started by completing the steps below.

1. Watch the Sneak Peek video for navigation tips at: www.capfed.com/dtbusiness
2. Setup to receive **Text Messages** (optional)
 - Click on Menu → My Settings → My Profile → Contact Information
 - Check the box for **Enable Text Message** and **I agree to the Terms & Conditions**
 - Click Save in the lower right corner
3. Setup **Subscriptions** (Alerts did not convert)
 - Click on Menu → My Settings → Subscriptions
 - Positive Pay Alerts will be managed separately through the Positive Pay tile and are initially setup to be sent by email.
4. Setup optional services:
 - Delete the old CapFed Business Mobile App & download new Mobile App (if entitled by Admin). **Use the same Activation Key you used with Secure Browser**
 - Re-establish your connection with QuickBooks through Intuit
 - Setup any reoccurring ACH transactions or Internal Transfers

For an **Admin User**, once you have done the above, here are some additional steps to take after you are signed in:

1. **Verify your Users' Access** – Users should have converted with similar access. Please verify.
2. **Remote Deposit Capture** (if applicable) – If you had DirectLink Merchant Users that do not have online banking access, you will need to add them as a User in online banking with Remote Deposit Capture access. You will manage Remote Deposit Capture in online banking instead of logging into a separate system.
 - Click on Menu → Administration → Company Overview → Users
3. **Positive Pay** (if applicable) – you will manage Positive Pay access and alerts separately through the Positive Pay tile. All alerts are initially setup to be sent by email.
 - **Check Positive Pay** – only the Admin user can update alert settings
 - **ACH Positive Pay** – only the Admin user can update alert settings