Getting Started Quick Reference Guide

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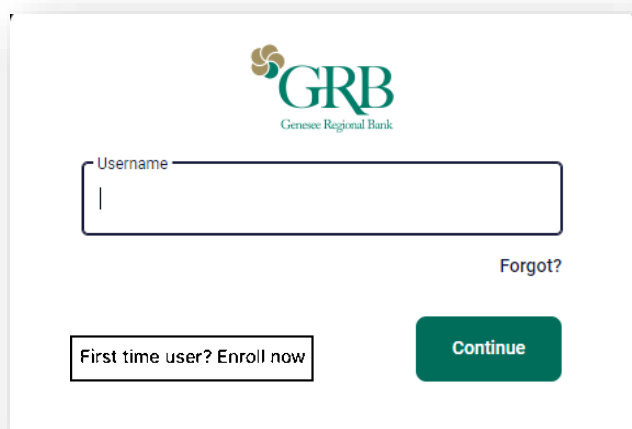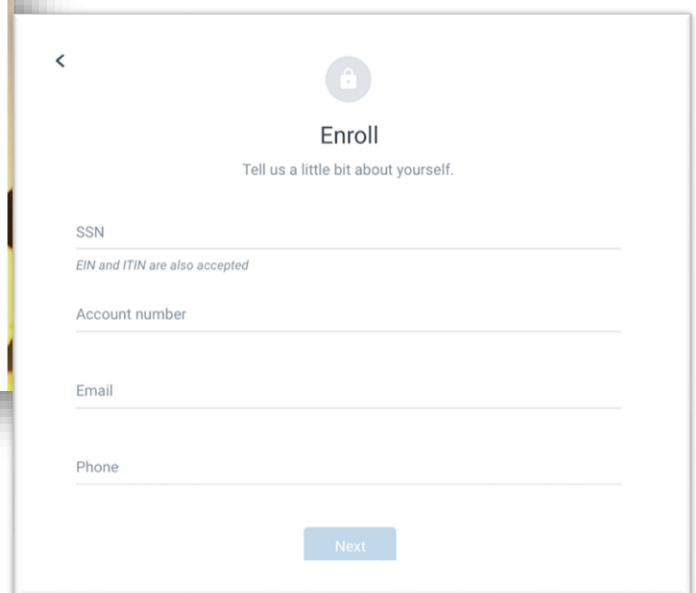- FAQs

Getting Started
Quick Reference Guide

First Time Enrollment *(effective 4/4/2022)*

- You **DO NOT** need to re-enroll if you were a previous GRBonline user.
  - Please use your current GRBonline username and password to access GRBbank. You **will** need to download the GRBbank app.

- **Step 1:** Go to My.grbbank.com or Download the GRBbank app for Apple or Android

- **Step 2:** Click *"First time user? Enroll now"* on the log in screen

- **Step 3:** Enter the information requested on the Enroll screen, and then select Next
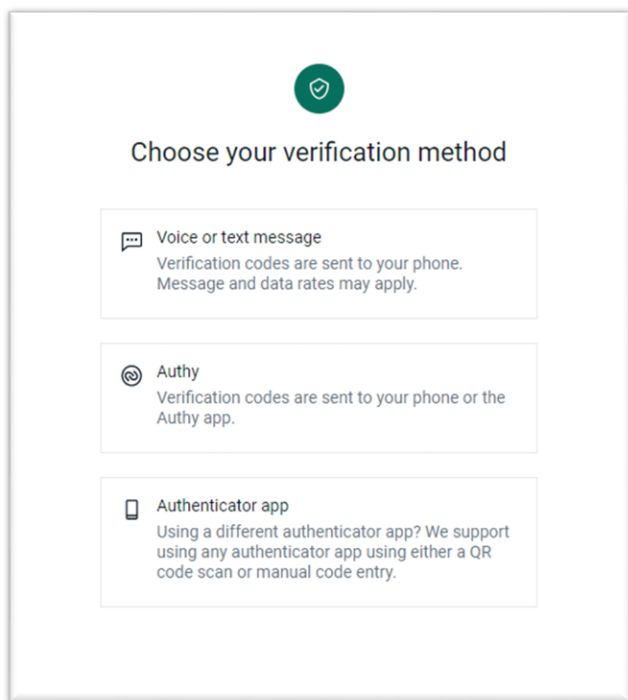
Desktop View

First Time GRBbank Log In – 2FA Set Up

- You will need to complete this step if you are a new user *OR* if you were a previous GRBonline user and this is the first time you're logging in to GRBbank.

- You will be required to set up **2-step verification**. Two-Factor Authentication (2FA) is a security feature that helps safeguard your account information when users provide two distinct form of identification.

  - **Voice or Text Message:** Verification codes are sent to your phone.

  - **Authy:** Use the Authy app to generate a unique code to authenticate your account. Available for iOS®, Android™, and desktop.

  - **Authenticator app:** Banno can support any authenticator app using either a QR code scan or manual code entry.
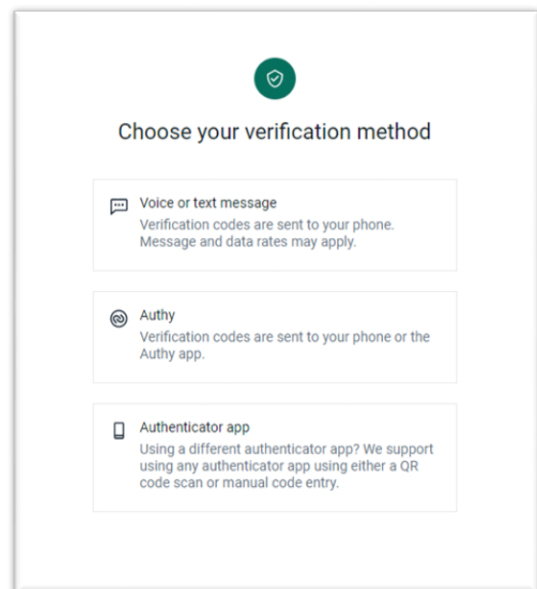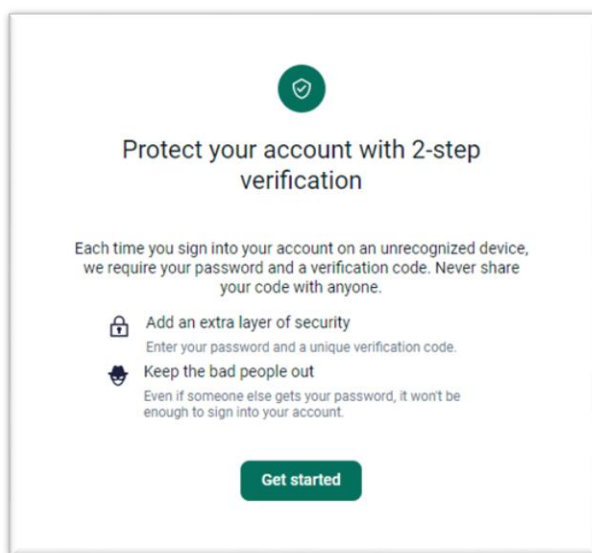
First Time GRBbank Log In – 2FA Set Up

- **Step 1:** Choose your preferred verification method
  - You can change your method in your account settings at anytime.
  - **NOTE:** If you connect your online banking to Quicken/Quickbooks, you must use the Authy App.

- **Step 2:** Follow the steps based on your selected method.

- **Step 3:** If you are on a trusted browser, you can check '*Don't ask for codes again while using this browser'.*
  - This allows you to avoid having to enter a verification code during each login.
  - **NOTE:** This option should *NEVER* be selected on a shared or public computer.

First Time GRBbank Log In – continued

- **Step 4:** Read the user agreement, and then Click *Agree*

- **Step 5:** Create a username and password by entering information in the Username and Password fields, and then click *Next*

On your first GRBbank app log in, **you will be prompted with your 2FA method**. You may create a passcode, and use biometrics (Fingerprint/Face ID) to access GRBbank for future log ins.
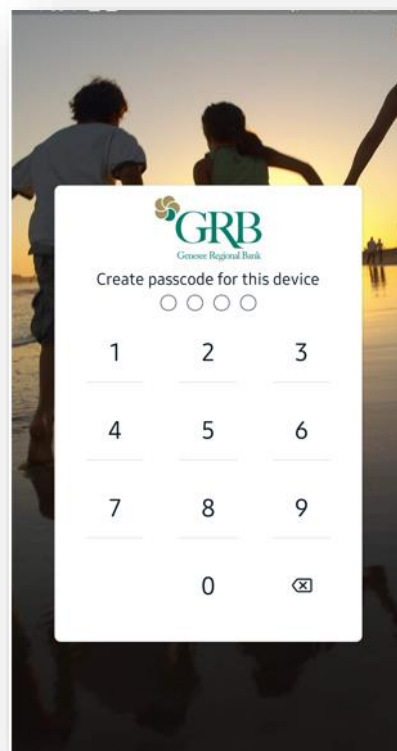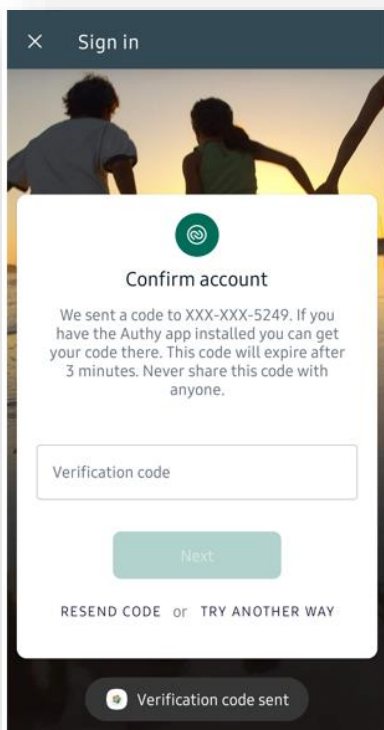
First log in on Mobile if enrolled through desktop

Updating User Profile and Security Settings

- To update various user settings, click on your name at the bottom left and select *Settings*.

- **Profile:** Update your personal info

- **Notifications** (Mobile View): Manage your App notifications

Desktop View

Mobile View

Genesee Regional Bank
www.GRBbank.com

NMLS # 417491
Member FDIC

Updating User Profile and Security Settings

- **Security**: Update username, password, manage your connected apps and intuit products, update your Two-Factor authentication method, View your devices that recently accessed GRBbank
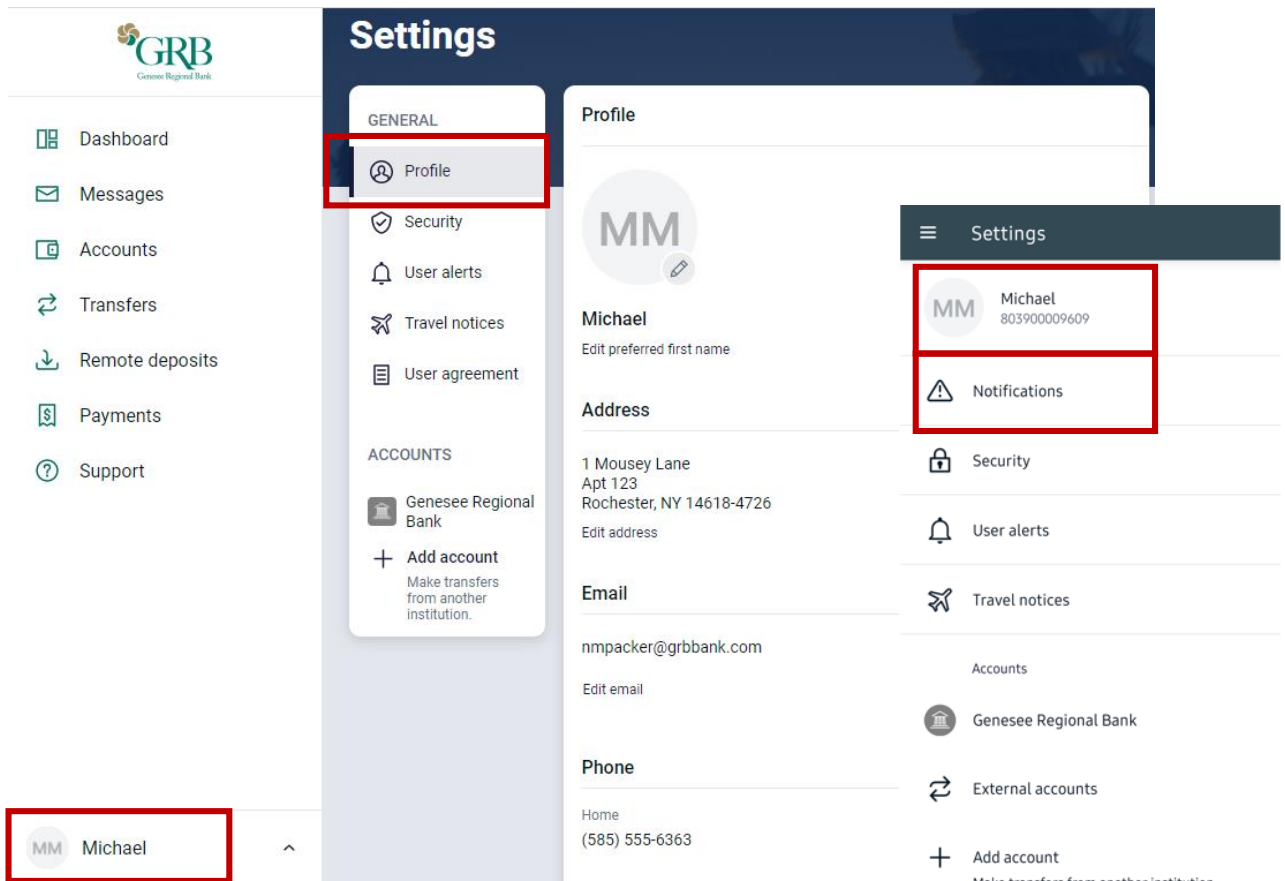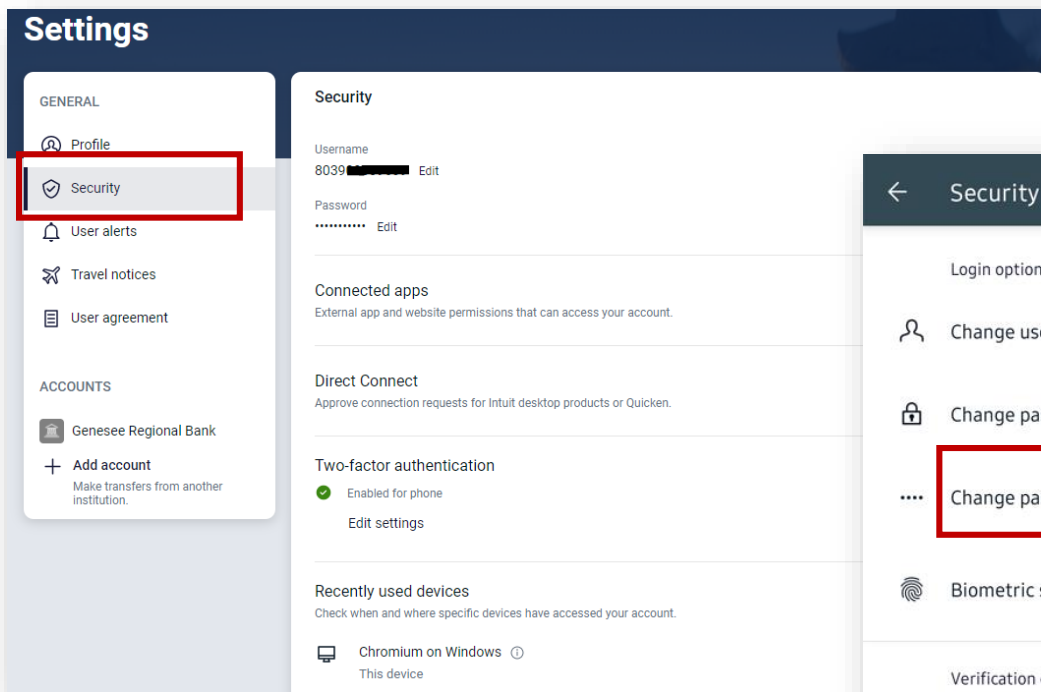
Desktop View
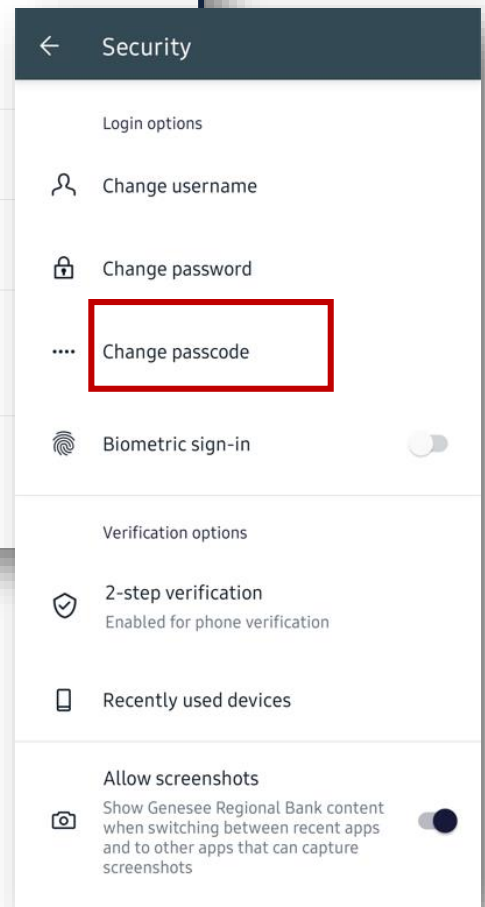
Mobile View

Updating User Profile and Security Settings

- **User Alerts:** set up user security alerts
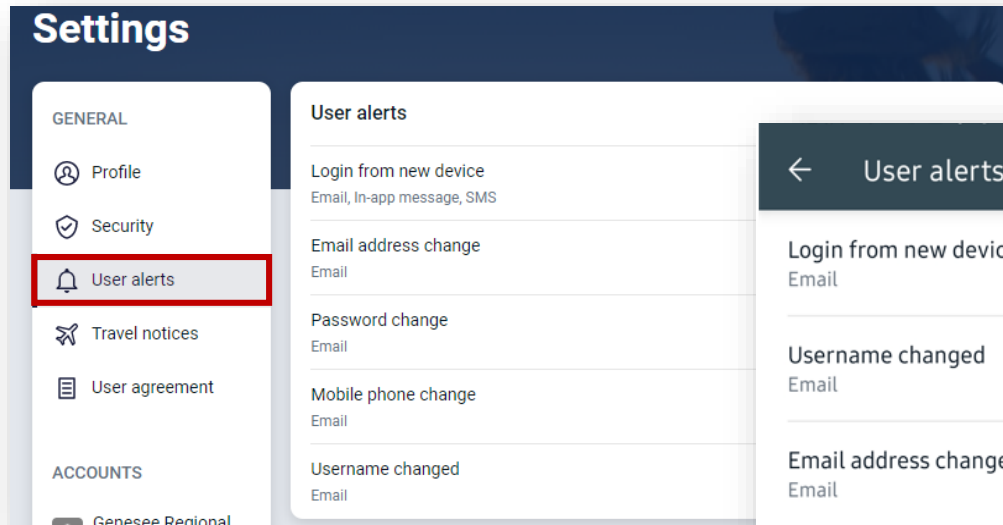
User Alerts Desktop View
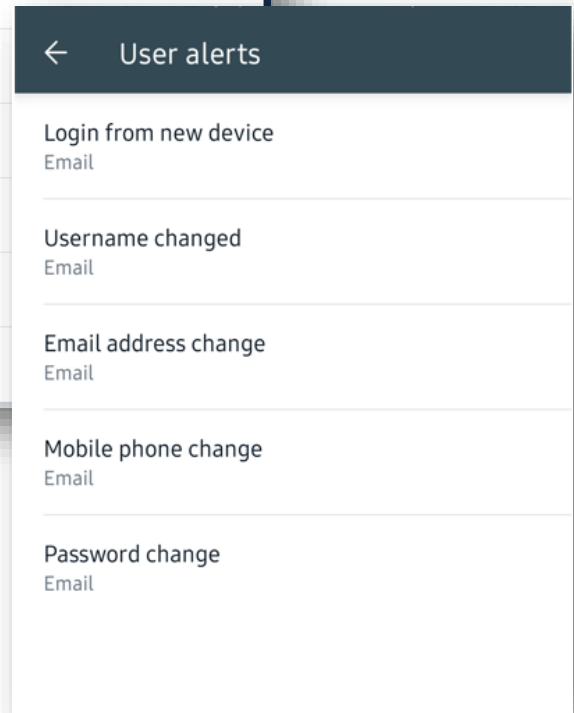
User Alerts Mobile View

- **Travel Notices:** Let us know when you'll be traveling with your debit card.
    - **NOTE:** This is reviewed in the Card Management Reference guide

- **User agreement**: Review GRBbank agreement

- **Accounts:** View your GRB accounts and any external accounts you set up

Getting Started - FAQs

Q. **Do I need to re-enroll in online banking to access the new GRBbank system?**

A. There is no need to enroll in GRBbank if you were previously enrolled in GRBonline.

Q. **I don't know my GRBbank credentials.**

A. Your credential have remained the same. Log in to GRBbank (online and mobile) with your existing GRBonline credentials.

Q. **What if I've forgotten my Username or password?**

A. Choose *Forgot?* when logging in to GRBbank and reset your password. You will need your Username and Email, or, if you forgot your username, you can use your account number along with your Social Security Number to reset. if you are unable to complete the steps, please contact us at 585-249-1540

Q. **Can I change my GRBbank Online ID and Password?**

A. You can change your ID and password at any time within GRBbank. Click on your name from the bottom of your menu, go to Settings and select Security. Click on Edit next to Username or Password to make changes.

Q. **I am a new customer, how do I sign up for GRBbank?**

A. Simply go to my.grbbank.com to self-enroll via a desktop, or download the GRBbank App from the Apple store, or Google Play Store to enroll via a mobile device.

Q. **Do I need to download a new mobile app?**

A. Yes, you will need to delete your old GRBmobile app and download the new GRBbank app. If you attempt to log in into the old app, you will be prompted to download the new app until 5/3/2022. After that, you will no longer have access to GRBmobile. Please delete the GRBmobile app off your device after you access the new GRBbank app.

Getting Started - FAQs

Q. **Can I use FaceID and TouchID to access the app?**

A. Yes, depending on your device's features, you may set up FaceID or TouchID to quickly access your account. You can even set up a passcode log in if you're unable to use FaceID or TouchID.

Q. **Which Internet browsers can I use to access my accounts online?**

A. We recommend that you use the latest versions of the following supported browsers: **Chrome, Firefox, Microsoft Edge, Safari.**

- **NOTE:** Please keep your browsers up-to-date to ensure safe browsing and uninterrupted access to online banking.

Q. **Why am I getting an error that says, "Incorrect phone number"?**

A. This error is present during the enrollment process and means the phone number you entered does not match the phone number we have on file. If you have an alternative phone number, you can try again. If you would like to update your phone number in our system or need other assistance, please contact us at 585-249-1540

Q. **Why am I getting an error that says, "Please verify your information and try again."?**

A. This error is present during the login process and typically means that your account information does not match our records. If you forgot your username or password, please use the Forgot? option at the bottom right of the log in window. Please contact us at 585-249-1540 if you need assistance.

Q. **I use an account aggregator (like a Financial site), and it's not connecting anymore. What do I do?**

A. Due to the conversion, your connection with the 3rd party aggregator may "break". This should resolve on its own. If not, please disconnect and reconnect.

Getting Started - FAQs

Q. What is Two-Factor Authentication and why am I asked for a code when I log in?

A. Two-Factor Authentication (2FA) is a security feature that helps safeguard your account information when users provide two distinct form of identification. It is an important security tool to help ensure you are the only one accessing your account information. By entering the code received at your number, the system knows it's you.

When initially setting up 2FA, you will need to enroll a phone number (mobile or landline). Once this information is entered, you'll choose one of three options to receive a one-time verification code:

1. Text message to the mobile phone entered,
2. Automated phone call to phone number entered, or
3. Authy Authenticator App

This is a one-time set up, so ensure that you have access to this phone while completing these steps. Each time you log in, you will receive a code at the phone number or via Authenticator App, originally provided. ***Please note - If you are using an Intuit product such as Quicken or Mint, you must use the Authy Authenticator app so the Intuit connection can access 2FA.**

Q. Do I need to get a verification code every time I log in?

A. After entering the verification code, if you are logging in from a secure computer or device, you have the option to select "Don't ask for code again on this computer." This allows you to avoid having to enter a verification code during each login. This option should never be selected on a shared or public computer.

Q. I received a request for a verification code, but I'm not trying to log in?

A. This is a result of one of two things:

1. You may be using an aggregation service (a site or 3rd party that logs in to online banking to retrieve your account data) that's prompting the code to be sent behind the scenes.
2. You may have potential fraud. Thankfully, this is exactly why 2FA is in place. If this happens (and you are not using any aggregation service), please change your password immediately.

Q. I decided I want to use another 2FA method. Can I update this?

A. Yes, you can update your Two-Factor Authentication method at any time. Click on your name from the bottom of your menu, go to Settings and select Security. Click on Edit settings under Two-Factor authentication to make changes.