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# About this Guide

Each of the topics includes step-by-step instructions for performing a specific task within Global Card Access or for accessing an application within the Global Card Access card portal. You can review all of the tasks in this guide or review the task that is specific to your interest. Your company must be configured for an application to view and access the application within the Global Card Access portal.

Within this guide, you will learn how to:

#### **Global Card Access**

- Log in to Global Card Access.
- Register as a new user.
- Update password and security questions.
- Edit profile information.
- Reset a forgotten password.

#### Alerts

- Set up Alerts and Contacts.
- Edit Alerts.
- Edit Contacts.
- Edit Preferences.
- Set up Corporate Account Alerts.

#### **Online PIN Check**

- Access Online PIN Check.
- Retrieve your PIN.



# Global Card Access

For General Inquiries - Contact Customer Service at 888.449.2273

#### Introduction

Bank of America Merrill Lynch has developed the Global Card Access website to provide cardholders and Program Administrators with Bank of America Merrill Lynch corporate card programs a single point of access to self-service tools such as Online PIN Check and Alerts registration. Currently, Alerts via Global Card Access is only available for US and Canada Card programs.

# Global Card Access Registration

All users must self-register for access to Global Card Access (Figure 1). After registration is complete, users may access other applications within the portal to which they are authorized, such as Online PIN Check and Alerts. Your organization must be configured for an application to view and access the application within Global Card Access.

#### Global Card Access Login Page

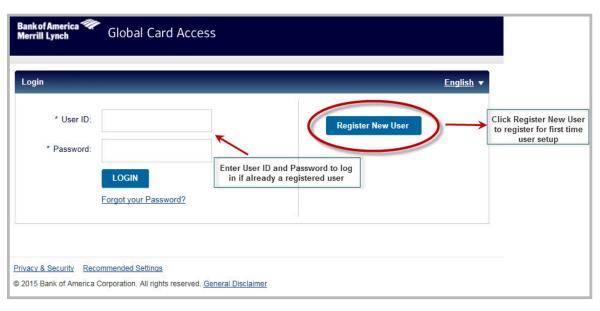


Figure 1: Global Card Acess Login Page

# Global Card Access - First Time Registration for Individual Accounts

To register as a new user, complete the following:

- 1. Access the Global Card Access website at www.bofaml.com/globalcardaccess
- 2. From the Global Card Access Login screen (Figure 1), click **Register New User**.
- 3. Enter your card account number.
- 4. Click Submit.
- 5. Complete the additional account information (Figure 2).

#### Notes:

- Registration information required varies based on region and account type.
- Click the icon for addtional details, as needed.

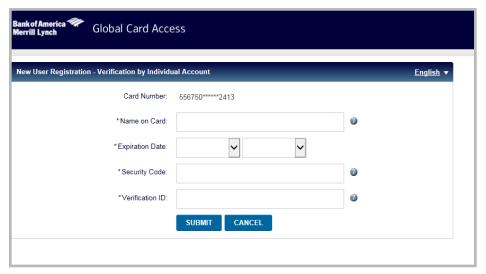


Figure 2: Complete Additional Account Information

6. Click **Submit.** The **New User Registration** screen displays.

7. Complete the information to define your **User ID** and **Password** (Figure 3).

#### **Notes:**

- A **User ID** must be a minimum of seven characters and a maximum of 50 characters.
- A **Password** must be a minimum of eight characters and must contain at least one alpha and one numeric character. Passwords are case sensitive.

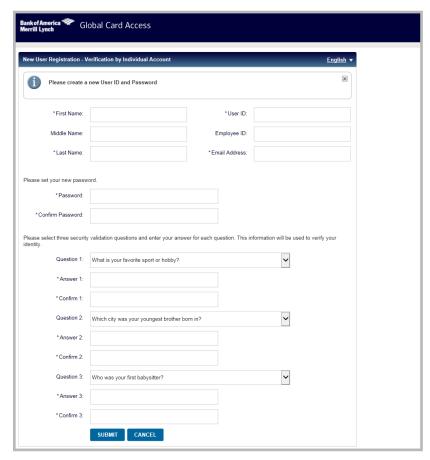


Figure 3: Define User ID and Password

- 8. Select three security validation questions and answers. This information will be used to verify your identity.
- 9. Click Submit.

10. Click **Accept** to acknowledge the Terms and Conditions (Figure 4). The Global Card Access Login screen displays a message confirming your registration is complete (Figure 5).

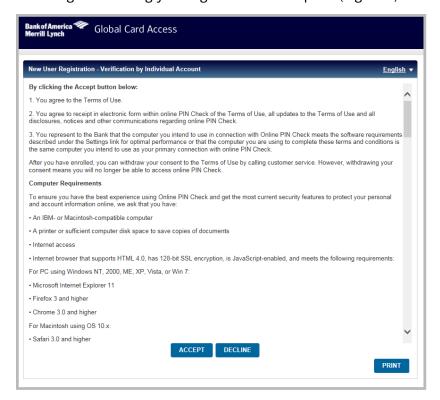


Figure 4: Accept Terms and Conditions

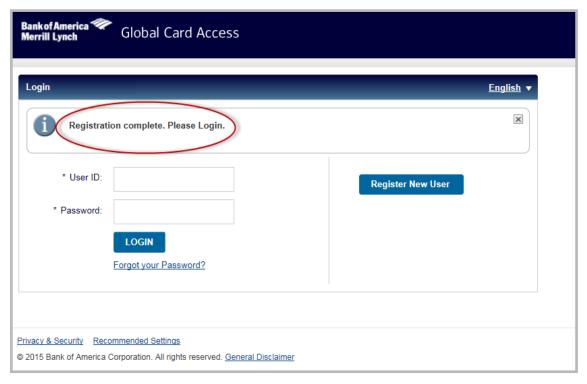


Figure 5: Registration confirmation message.

This completes the procedure.

# Log in as a Registered User

To log in to Global Account Access as a registered user, complete the following:

- 1. Go to Global Card Access at www.bofaml.com/globalcardaccess
- Enter your User ID.
- 3. Enter your Password.
- 4. Click **Login**. The Global Card Access home page displays (Figure 6).

# Global Card Access Home Page

The menu bar that displays on the Global Card Access home page may differ depending on your company's configuration to applications.

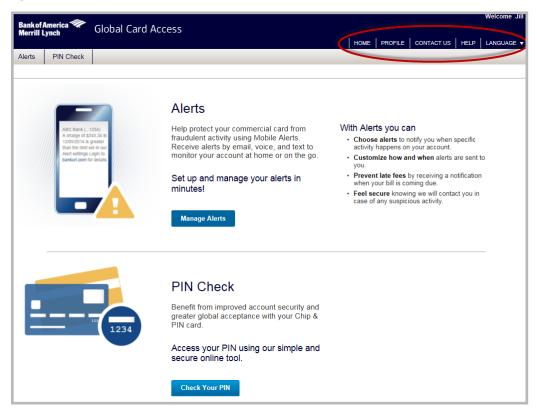


Figure 6: Global Card Access Homepage

The following links are located in the top-right corner of the home page:

- Home Click Home from any screen to return to the home page
- Profile Click Profile to change your password or edit information, such as User ID and email address.
- Contact Us Click Contact Us to access Customer Service contact information.
- Help Click Help to access reference documentation.
- Language Users may select their language preference for Global Card Access from the drop-down menu.

# Changing your Password

To change your password, complete the following:

- 1. Log in to Global Card Access.
- 2. Click **Profile** in the top right corner of the screen. The My Info screen displays.
- 3. Click Change Password.
- 4. Enter your current password in the Current Password field.
- 5. Enter your new password in the **New Password** field.
- 6. Re-enter your new password in the **Confirm Passwor**d field.
- 7. Click **Submit**. A message displays indicating your password has been changed.

**Note**: In the interest of security, an email is sent to the user to confirm the update.

This completes the procedure.

### **Editing Profile Information**

To edit your profile information, complete the following:

- 1. Log in to Global Card Access.
- 2. Click **Profile** in the top-right corner of the screen. The My Info screen displays (Figure 7).

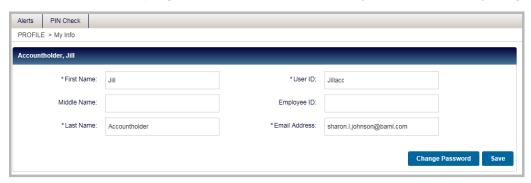


Figure 7: Edit Profile Information

- 3. Edit any of the desired fields:
  - First Name
  - Middle Name
  - Last Name
  - User ID
  - Employee ID
  - Email Address
- 4. Click **Save**. A confirmation message displays.

**Note**: In the interest of security, an email is sent to the user to confirm the update.

This completes the procedure.

# Resetting a Forgotten Password

To use the Forgot your Password? feature, complete the following:

- From the Global Card Access login screen, click Forgot your Password? The Forgot Your Password screen displays.
- 2. Enter your **User ID** and **Email**. Additional information on the password reset will be emailed to the email address entered.
- 3. Click Submit.
- 4. Enter an answer to the Security Question that displays.
- 5. Click **Submit**. The login screen displays with a message indicating an email will be sent with additional instructions for resetting your password.
- 6. Enter your **User ID** and the temporary password contained within the Forgotten Password Reset email on the login screen.
- 7. Click **Login**. The Change Expired Password screen displays (Figure 8).



Figure 8: Change Expired Password

- 8. Enter the temporary password in **Current Password**.
- 9. Enter a new password in **New Password**.

**Note**: Passwords must be a minimum of eight characters and must contain at least one alpha and one numeric character. Passwords are case sensitive.

- 10. Re-enter the new password in **Confirm Password**.
- 11. Click **Submit**. A confirmation message displays.

This completes the procedure.



**Alerts** 

For General Inquiries - Contact Customer Service at 888.449.2273

#### Introduction

Alerts provide notifications about important, time-sensitive information about your corporate card account and activity. With Alerts, you receive critical information about your corporate card accounts without logging in to an application. You can select the communication channel that best suits your business needs including email and text message for all alert types, or select voicemail for suspicious activity alerts.

Alerts is currently available only to cardholders with US and Canada-based corporate card programs within the Global Card Access website, and users must have a US or Canadian mobile phone number in order to receive text or voice alerts. Your organization must be configured for Alerts to view and access the application within Global Card Access.

#### Alerts Access

All users must self-register for access to Global Card Access. After registration is complete, users may access the Alerts application within Global Card Access. Refer to "Global Card Access - First Time Registration for Individual Accounts" on page 6 for registration instructions.

#### Alerts for Individual Accounts

Available Alert options vary according to the type of card account you are registering. Individual cardholders will register an 'individual' account number, and program administrators will register a 'corporate' account number. After you enter the Alerts tool the applicable alerts based on your program type will be viewable for you to select.

The Individual Account **Alert Types** include:

- Suspicious Activity
- Purchase Amount
- Distance From Zip
- Specific Balance Amount
- Merchant State/Country/Type
- Mail/Phone/Internet Purchase
- Purchase Declined
- Cash Purchase

- Credit Available
- % of Credit Limit (Multi-Threshold)
- Specific Balance Amount
- Payment Due in X Days (Individual Bill Only)
- Payment Amount (Individual Bill Only)
- Missed Payment (Individual Bill Only)
- Personal Info Changed
- New Card Requested

# Setting Up Alerts and Contacts

To set up alerts and contacts, complete the following:

- Log in to Global Card Access.
- 2. Click the Alerts tab or click **Manage Alerts**.
- 3. Select an option for **Language** and **Time Zone** preferences from the drop-down menus that display (Figure 1).

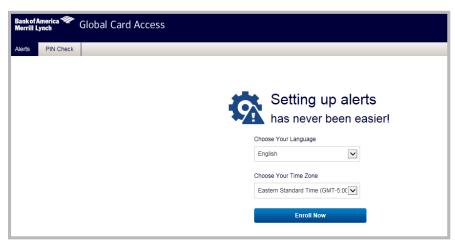


Figure 1: Select Alert Preferences

Click Enroll Now.

5. Click **Accept** to acknowledge the Alerts Terms and Conditions (Figure 2). The Contacts screen displays with an enrollment confirmation message.

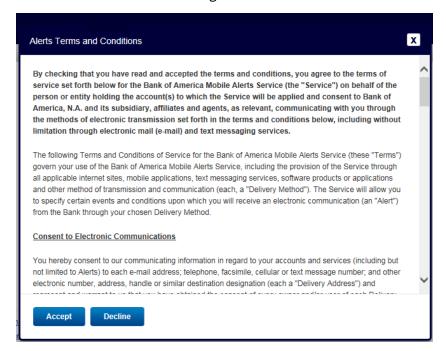


Figure 2: Accept Alerts Terms and Conditions

6. Complete the actions, as needed (Figure 3). This feature will allow additional person(s) to receive the alert.

#### Notes:

- You may have a maximum of three contacts for each Alert.
- The information requested will vary based on the delivery option (Contact Type) selected.

То	Then				
Set up a Voice	a. Enter a <b>Nickname</b> (maximum 25 characters, including special characters) for the contact.				
contact	b. Select <b>Voice</b> from the <b>Contact Type</b> drop-down menu. The <b>Voice</b> option can only be selected for Suspicious Activity alerts.				
	c. Enter a phone number, including the area code, in <b>Phone/Email</b> .				
	d. Go to step 7.				
Set up a Email	a. Enter a <b>Nickname</b> (maximum 25 characters, including special characters) for the contact.				
contact	b. Select <b>Email</b> from the <b>Contact Type</b> drop-down menu.				
	c. Enter the email address in <b>Phone/Email</b> .				
	d. Go to step 7.				

То	Then				
Set up a Text	a. Enter a <b>Nickname</b> (maximum 25 characters, including special characters) for the contact.				
contact	b. Select <b>Text</b> from the <b>Contact Type</b> drop-down menu.				
	c. Select an option in <b>Country</b> .				
	d. Enter the phone number, including the area code, in <b>Phone/Email</b> .				
	<b>Important</b> : A text message will be sent to the contact to verify the phone number. Text contacts must confirm their acceptance and reply within 15 minutes to complete their registration.				
	e. Enter the specified time frame when text or phone alerts should be suppressed, if desired, in <b>Do Not Disturb.</b>				
	f. Go to step 7.				

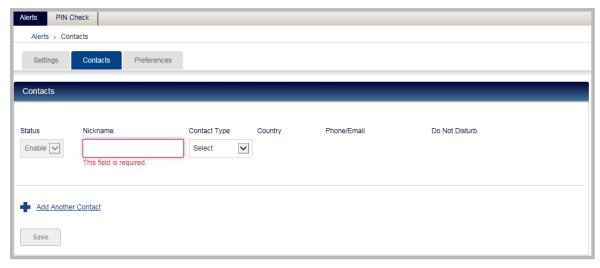


Figure 3: Set Up New Contacts

#### 7. Do you wish to add additional contacts?

If	Then				
Yes	a. Select <b>Add Another Contact</b> .				
	b. Click the <b>Select</b> drop-down menu.				
	c. Does the desired	Does the desired contact display in the drop-down menu?			
	If	f Then			
	Yes	i. Select the desired contact.			
		<ul><li>ii. Continue adding contacts by clicking <b>Add Another Contact</b>, if desired.</li></ul>			
		<b>Note</b> : You may have a maximum of three contacts for each Alert.			
		iii. Click <b>Save</b> . A confirmation message displays.			
		iv. Go to step 8.			
	No	i. Select <b>Add New Contact</b> from the drop-down menu.			
		<ol> <li>Enter a <b>Nickname</b> (maximum 25 characters, including special characters) for the new contact.</li> </ol>			
		iii. Select an option for <b>Contact Type</b> .			
		iv. Enter the information required for the new contact.			
		v. Click <b>Save</b> . A confirmation message displays.			
		vi. Go to step 8.			
No	Go to step 8.				

8. Do you wish to remove a contact?

If	Then			
Yes	Click <b>K</b> beside the contact to be deleted.			
	b. Click <b>Continue</b> . A confirmation messages displays.			
	Go to step 9.			
No	Go to step 9.			

9. Click the **Settings** tab. The Alerts Settings screen displays (Figure 4).

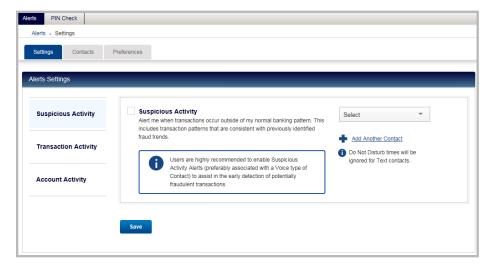


Figure 4: Set up Alerts Settings

# 10. Complete the following actions, as desired:

То	The	Then				
Set up Suspicious	a. Se	a. Select the <b>Suspicious Activity</b> check box.				
Activity Alert	b. Cl	o. Click the <b>Select</b> drop-down menu.				
	c. Do	c. Does the desired contact display in the drop-down menu?				
		If	Then			
		Yes	i.	Select the desired contact.		
			ii.	Continue adding contacts by clicking <b>Add Another Contact</b> , if desired.		
			No	te: You may add a maximum of three contacts to each Alert.		
			iii.	Click <b>Save</b> . A confirmation message displays.		
			This completes the procedure.			
		No	i.	Select <b>Add New Contact</b> from the drop-down menu.		
			ii.	Enter a <b>Nickname</b> (maximum 25 characters, including special characters) for the new contact.		
			iii.	Select a <b>Contact Type</b> .		
			iv.	Enter the information required for the new contact.		
			V.	Select the <b>terms and conditions</b> and <b>privacy policy</b> statement check box to accept, if it displays.		
			vi.	Click <b>Save</b> . A confirmation message displays.		
			This o	completes the procedure.		

То	Then					
Set up Transaction	g. Click <b>Transaction Activity</b> . A list of transaction alerts displays.					
Activity Alerts	h. Select the check box beside the alert you wish to receive.					
		<b>Note</b> : Some alerts have additional thresholds that require you to complete additional information. (Figure 5).				
	i. E	nter or select addional	thresh	old options, as needed.		
	j. C	lick the <b>Select</b> drop-do	wn me	enu.		
	k. D	Does the desired contact display in the drop-down menu?				
		If	Then			
		Yes	i.	Select the desired contact.		
			ii.	Continue adding contacts by clicking <b>Add Another Contact</b> , if desired.		
			No	te: You may have a maximum of three contacts for each Alert.		
			iii.	Go to step f.		
		No	i.	Select <b>Add New Contact</b> from the drop-down menu.		
			ii.	Enter a <b>Nickname</b> (maximum 25 characters, including special characters) for the new contact.		
			iii.	Select a <b>Contact Type</b> .		
			iv.	Enter information required for the new contact.		
			V.	Select the <b>terms and conditions</b> and <b>privacy policy</b> statement check box to accept, if it displays.		
			vi.	Click <b>Save</b> .		
			vii.	Go to step f.		
	f. Continue to select the check box beside each alert you wish to receive, as needed.					
	g. Select at least one contact from the <b>Select</b> drop-down menu for each alert selected.					
	Note: You may have a maximum of three contacts for each Alert.					
	h. C	n. Click <b>Save</b> . A confirmation message displays.				
	This completes the procedure.					

То	Then					
Set up Account	a. Click <b>Account Activity.</b> A list of account alerts displays.					
Activity Alerts	b. Select the check box beside the alert you wish to receive.					
	Notes:					
	•	Account Alerts will vary based on the account type.				
	•	Some alerts have additional thresholds that require you to complete additional information.				
	c. E	nter or select addional	thresh	nold options, as needed.		
	d. C	lick the <b>Select</b> drop-do	wn m	enu.		
	e. D	oes the desired contac	t displ	ay in the drop-down menu?		
		If	Then			
		Yes	i.	Select the desired contact.		
			ii.	Continue adding contacts by clicking <b>Add Another Contact</b> , if desired.		
			No	<b>te</b> : You may have a maximum of three contacts for each Alert.		
			iii.	Go to step f.		
		No	i.	Select <b>Add New Contact</b> from the drop-down menu.		
			ii.	Enter a <b>Nickname</b> (maximum 25 characters, including special characters) for the new contact.		
			iii.	Select a <b>Contact Type</b> .		
			iv.	Enter the information required for the new contact.		
			V.	Select the <b>terms and conditions</b> and <b>privacy policy</b> statement check box to accept, if it displays.		
			vi.	Click <b>Save</b> .		
			vii.	Go to step f.		
	f. C	ontinue to select the cl	neck b	ox beside each alert you wish to receive, as needed.		
	g. Select at least one contact from the <b>Select</b> drop-down menu for each alert selected.					
	<b>Note:</b> You may have a maximum of three contacts for each Alert.					
	h. C	. Click <b>Save</b> . A confirmation message displays.				
	This completes the procedure.					

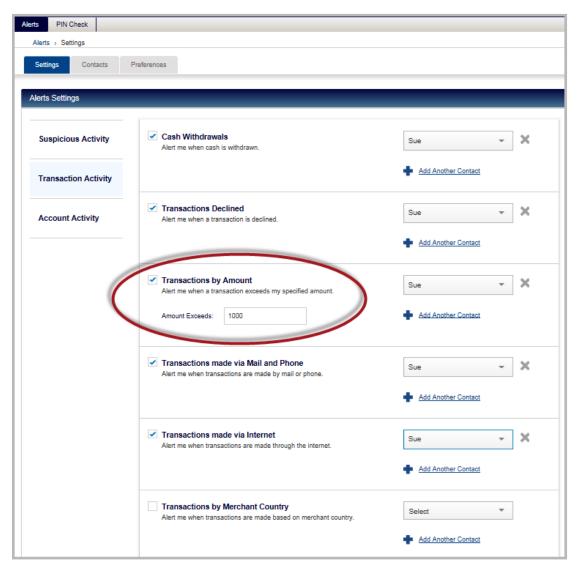


Figure 5: Complete Additional Threshold Options Where Provided

# **Editing Alerts**

A user can perform the following maintenance on an alert:

Un-enroll in an alert.

Note: To cancel enrollment of an account in Alerts, refer to "Editing Alert Preferences" on page 24.

- Add an alert.
- Change the contact(s) for an alert.
- Change threshold options for an alert.

To perform maintenance on an alert, complete the following:

- 1. Log in to Global Card Access.
- 2. Click the Alerts tab or click Manage Alerts.
- 3. Do you wish to unenroll in an alert?

If	Then					
Yes	a. Click one of the desired Alerts Settings to display the list of alerts, as needed:					
	Suspicious Activity Alert					
	Transaction Activity Alerts					
	Account Activity Alerts					
	Note: If you are unenrolling in a corporate account alert, go to step b.					
	b. Clear the check box of the desired alert(s).					
	c. Click <b>Save</b> . A confirmation message displays.					
	d. Go to step 4.					
No	Go to step 4.					

4. Do you wish to add an alert?

Do you mish to due	bo you wish to dud an alert:					
If	Then					
Yes	a. Click one of the desired Alerts Settings, as needed:					
	Suspicious Activity Alert					
	Transaction Activity Alerts					
	Account Activity Alerts					
	Note: If you are adding a corporate account alert, go to step b.					
	b. Select the check box beside the alert(s) you wish to receive.					
	<b>Note</b> : Some alerts have additional thresholds that require you to complete.					
	c. Enter or select addional threshold options, as needed.					
	d. Click <b>Save</b> . A confirmation message displays.					
	e. Go to step 5.					
No	Go to step 5.					

5. Do you wish to change the contact(s) for an alert? Then...

If...

Yes	a. Click the desired Alerts Settings, as needed:					
		Transaction Activity Alerts				
		Account Activity Alerts				
	N	ote: If you are changir	ng a co	ntact for a corporate account alert, go to step b.		
	b. C	omplete any of the foll	owing	on the desired alert, as needed:		
		То	Then			
		Replace an existing contact	i.	Select a contact from the <b>Select</b> drop-down menu for the contact to be replaced. This action replaces one contact for another but does not remove the contact as an option.		
			ii.	Click <b>Save</b> . A confirmation message displays.		
			iii.	Go to step 6.		
		Add a New Contact	i.	Select <b>Add New Contact</b> from the <b>Select</b> drop-down menu.		
			ii.	Enter a <b>Nickname</b> (maximum 25 characters, including special characters) for the new contact.		
			iii.	Select a <b>Contact Type</b> .		
			iv.	Enter the information required for the new contact.		
			V.	Select the <b>terms and conditions</b> and <b>privacy policy</b> statement check box to accept, if it displays.		
			vi.	Click <b>Save</b> . A confirmation message displays.		
			vii.	Go to step 6.		
		Remove a contact from the Alert	i.	Click <b>** beside</b> the contact to be removed. This action removes the contact from the alert, but does not remove the contact as an option.		
			ii.	Click <b>Save.</b> A confirmation messages displays.		
			iii.	Go to step 6.		
No	Go t	o step 6.				

6. Do you wish to change the threshold options for an alert?

If	Then
Yes	a. Click the desired Alerts Settings, as needed:
	Transaction Activity Alerts
	Account Activity Alerts
	<b>Note:</b> If you are changing threshold options for a corporate account alert, go to step b.
	b. Select the check box beside the alert you wish to edit.
	c. Edit the threshold options that display, as needed.
	d. Click <b>Save</b> . A confirmation message displays.
	This completes the procedure.
No	This completes the procedure.

# **Editing Contacts**

A user can perform the following maintenance on a contact:

- Update contact information.
- Edit Status Temporarily disables a contact.
- Add another contact.
- Delete a contact Removes a contact from the Alerts database.

Note: Deleting a contact that is assigned only to one alert also causes the alert to be deleted.

To perform maintenance on a contact, complete the following:

- 1. Log in to Global Card Access.
- 2. Click the Alerts tab or click **Manage Alerts**.
- 3. Click the Contacts tab. The Contacts screen displays.
- 4. Complete the following actions, as needed:

То	The	Then				
Update contact	a. E	a. Edit the information for the desired contact(s).				
information	b. C	b. Click <b>Save</b> . A confirmation message displays.				
Edit Status	a. Select an option from the <b>Status</b> menu:					
	-	Select <b>Disable</b> to ter	mporari	ly suspend a contact.		
	-	Select <b>Enable</b> to return a contact to an active status.				
	b. C	b. Click <b>Save</b> . A confirmation message displays.				
Add another	a. S	a. Select Add Another Contact.				
contact	b. C	b. Click the <b>Select</b> drop-down menu.				
	c. D	oes the desired conta	ct displ	ay in the drop-down menu?		
		If Then				
		Yes	i.	Select the desired contact.		
			ii.	Continue adding contacts by clicking <b>Add Another Contact</b> , if desired.		
			No	te: You may have a maximum of three contacts for each Alert.		
			iii.	Click <b>Save</b> . A confirmation message displays.		
		No	i.	Select <b>Add New Contact</b> from the drop-down menu.		
			ii.	Enter a <b>Nickname</b> (maximum 25 characters, including special characters) for the new contact.		
			iii.	Select a <b>Contact Type</b> .		
			iv.	Enter the information required for the new contact.		
			V.	Select the <b>terms and conditions</b> and <b>privacy policy</b> statement check box to accept, if it displays.		
			vi.	Click <b>Save</b> . A confirmation message displays.		
Delete a contact	a. C	a. Click <b>X</b> beside the contact to be deleted.				
	b. C	b. Click <b>Continue</b> . A confirmation message displays.				

This completes the procedure.

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# **Editing Alert Preferences**

To change your language and time zone preferences, cancel enrollment in Alerts, or view Alerts Terms and Conditions, complete the following:

- 1. Log in to Global Card Access.
- 2. Click the Alerts tab or click **Manage Alerts**.
- 3. Click the Preferences tab. The Preferences screen displays (Figure 6).

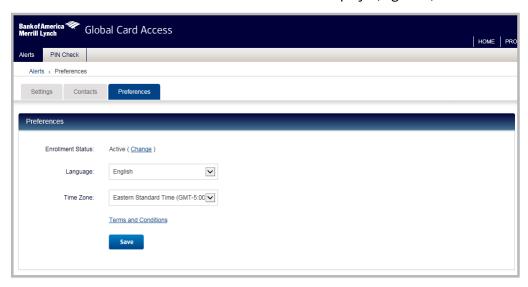


Figure 6: Edit Alerts Preferences

4. Complete the following actions, as needed:

То	Then
Change Language or Time Zone Preferences	a. Select an option from the <b>Language</b> drop-down menu, as needed.
	b. Select an option from the <b>Time Zone</b> drop-down menu, as needed.
	c. Click <b>Save</b> .
	This completes the procedure.
Un-enroll in Alerts	a. Click <b>Change</b> in the <b>Enrollment Status</b> field.
	b. Click <b>Yes, I want to un-enroll</b> . The Global Card Access home screen displays.
	This completes the procedure.
View Alerts Terms	a. Click <b>Terms and Conditions</b> .
and Conditions	b. Click <b>Close</b> .
	This completes the procedure.

#### **User-Initiated Text Alerts**

At the request of an Alerts user who is a registered text contact, a text alert can be provided regarding a registered account. Text messages regarding account activity or account transactions may be sent to a user on the mobile phone number when prompted by the user. A user can request account information using the following key words and a short code from the mobile phone. The short code is a multi-digit number that can send and receive messages with mobile phones. For Alerts, the short code is 767262. For example, text "BAL" to 767262 to have your current account balance sent to your phone.

#### Account Information Key Words

- BAL = Balance
- AVAIL = Available credit/cash
- BILL = Minimum/last payment
- TRANS = Last three transactions
- HELP = Help
- STOP = Cancel

# Alerts for Corporate Accounts

Program Administrators may have access to Corporate Account alerts. Alert settings for Corporate Accounts are shared by all users for that account. Changes to an account's alert settings may impact other users.

The specific alerts available differ based on the Account Type and Billing Type combination of the account:

- Corporate Account/Corporate Bill
- Corporate Account/Individual Bill

The Corporate Account **Alert Types** include:

- Credit Available
- % of Credit Limit (Multi-Threshold)
- Specific Balance Amount
- Payment Due in X Days (Corporate Bill Only)
- Payment Amount (Corporate Bill Only)
- Missed Payment (Corporate Bill Only)

# First Time Registration for Corporate Account - New User Registration

To register as a new user for a corporate account, complete the following:

- 1. Access the Global Card Access website at www.bofaml.com/globalcardaccess
- 2. Click Register New User on the Global Card Access Login screen.
- 3. Enter the corporate **Card Number**.
- 4. Select Corporate Billing Account.
- 5. Click Submit.
- 6. Complete the additional account information:
  - Company Name
  - Company Number
  - Credit Limit
  - Zip/Postal Code
- 7. Click **Submit**. The New User Registration screen displays.
- 8. Complete the information to define your **User ID** and **Password** (Figure 7).

#### **Notes:**

- A User ID must be a minimum of seven characters and a maximum of 50 characters.
- A Password must be a minimum of eight characters and must contain at least one alpha and one numeric character. Passwords are case sensitive.

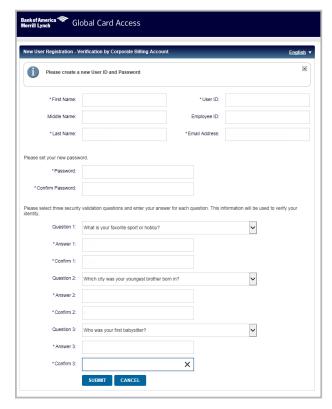


Figure 7: Complete New User Registration Information

- 9. Select three security validation questions and answers. This information will be used to verify your identity.
- 10. Click Submit.
- 11. Click Accept to acknowledge the Terms and Conditions. The Global Card Access Login screen displays a message confirming your registration is complete.

This completes the procedure.

#### Log in as a Registered User

To log in to Global Account Access as a registered user, complete the following:

- 1. Go to Global Card Access at www.bofaml.com/globalcardaccess
- Enter your **User ID**.
- 3. Enter your **Password**.
- Click **Login**. The Global Card Access home page displays.

### Setting Up Corporate Account Alerts and Contacts

To set up corporate account alerts and contacts, complete the following:

- Log in to Global Card Access. The Global Card Access home page displays.
- Click the Alerts tab or click Manage Alerts. 2.
- Select an option for Language and Time Zone preferences from the drop-down menus that display.
- Click **Enroll Now**.
- Click **Accept** to acknowledge the Alerts Terms and Conditions. The Contacts screen displays with an enrollment confirmation message (Figure 8).

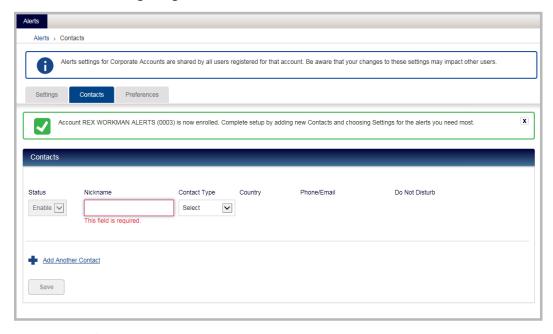


Figure 8: Complete Contacts Set Up

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6. Complete the actions, as needed. This feature will allow additional person(s) to receive the alert.

#### Notes:

- You may have a maximum of three contacts for each Alert.
- The information requested will vary based on the delivery option (**Contact Type**) selected.
- The **Voice Contact Type** can only be selected for Suspicious Activity alerts, which are not available to corporate accounts.

То	Then			
Set up a Email contact	a. Enter a <b>Nickname</b> (maximum 25 characters, including special characters) for the contact.			
	b. Select <b>Email</b> from the <b>Contact Type</b> drop-down menu.			
	c. Enter the email address in <b>Phone/Email</b> .			
	d. Go to step 7.			
Set up a Text contact	a. Enter a <b>Nickname</b> (maximum 25 characters, including special characters) for the contact.			
	b. Select <b>Text</b> from the <b>Contact Type</b> drop-down menu.			
	c. Select an option in <b>Country</b> .			
	d. Enter the phone number, including the area code, in <b>Phone/Email</b> .			
	<b>Important</b> : A text message will be sent to the contact to verify the phone number. Text contacts must confirm their acceptance and reply within 15 minutes to complete their registration.			
	e. Enter the specified time frame when text or phone alerts should be suppressed, if desired, in <b>Do Not Disturb.</b>			
	f. Go to step 7.			

### 7. Do you wish to add additional contacts?

If	The	n			
Yes	a. Select Add Another Contact.				
	b. Click the <b>Select</b> drop-down menu.				
	c. D	Does the desired contact display in the drop-down menu?			
		If	Th	en	
		Yes	i.	Select the desired contact.	
			ii.	Continue adding contacts by clicking <b>Add Another Contact</b> , if desired.	
				<b>Note</b> : You may have a maximum of three contacts for each Alert.	
			iii.	Click <b>Save</b> . A confirmation message displays.	
			iv.	Go to step 8.	
		ii ii iv	i.	Select <b>Add New Contact</b> from the drop-down menu.	
			ii.	Enter a <b>Nickname</b> (maximum 25 characters, including special characters) for the new contact.	
			iii.	Select an option for <b>Contact Type</b> .	
			iv.	Enter the information required for the new contact.	
			V.	Click <b>Save</b> . A confirmation message displays.	
			vi.	Go to step 8.	
No	Go t	o step 8.			

#### 8. Do you wish to remove a contact?

If	Then		
Yes	a. Click <b>X</b> beside the contact to be deleted.		
	b. Click <b>Continue</b> . A confirmation messages displays.		
	Go to step 9.		
No	Go to step 9.		

9. Click the **Settings** tab. The Alerts Settings screen displays with a list of Account Activity alerts.

10. Select the check box beside the alert you wish to receive.

Note: Some alerts have additional thresholds that require you to complete additional information (Figure 9).

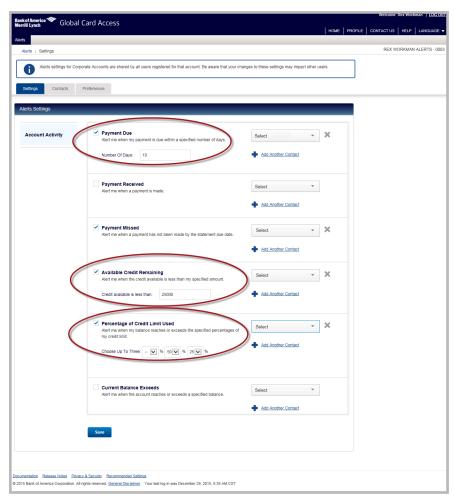


Figure 9: Complete Additional Threshold Information

- 11. Enter or select additional threshold information, as needed.
- 12. Click the **Select** drop-down menu.

13. Does the desired contact display in the drop-down menu?

If	Then
Yes	a. Select the desired contact.
	b. Continue adding contacts by clicking <b>Add Another Contact</b> , if desired.
	Note: You may have a maximum of three contacts for each Alert.
	c. Go to step 14.
No	a. Select <b>Add New Contact</b> from the drop-down menu.
	b. Enter a <b>Nickname</b> (maximum 25 characters, including special characters) for the new contact.
	c. Select a <b>Contact Type</b> .
	d. Enter the information required for the new contact.
	e. Select the <b>terms and conditions</b> and <b>privacy policy</b> statement check box to accept, if it displays.
	f. Click <b>Save</b> .
	g. Go to step 14.

- 14. Continue to select the check box beside each alert you wish to receive, as needed.
- 15. Select at least one contact from the **Select** drop-down menu for each alert selected.
- 16. Click **Save**. A confirmation message displays.

This completes the procedure.

# Editing Corporate Account Alerts and Contacts

The process to edit Corporate Account alerts and contacts is the same as those documented for Individual Account Alerts and contacts. Refer to "Editing Alerts" on page 21 and "Editing Contacts" on page 23.



# Online PIN Check

For General Inquiries - Contact Customer Service at 888.449.2273

#### Introduction

As you travel, you will find that Chip and PIN terminals are becoming more common and require the use of a Chip and PIN enabled card. To complete a purchase at these terminals, you will need to enter a PIN rather than provide a signature. The chip supplements the magnetic stripe on the card, providing you with greater access to points of sale and improved acceptance around the globe. Online Pin Check is a simple online tool with robust security features, allowing you to access your 4-digit PIN associated with your Chip and PIN Card whenever you need it.

Online PIN Check is available only to Individual Accounts in:

- North America
- Europe
- Middle East Asia (not Asia Pacific)
- Austrailia

Your organization must be configured for Online PIN Check to view and access the application within Global Card Access.

#### You are never without your PIN

It is important that you remember your PIN and do not share with others. You can retrieve a forgotten PIN online at any time by visiting <a href="https://www.bofaml.com/globalcardaccess">www.bofaml.com/globalcardaccess</a> after a one time registration. The instructions that follow will help you get started.



Figure 1: Cardholder Login Page

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# First Time Registration

A user must register through the Global Card Access website before gaining full access to the PIN Check site and retrieving a PIN. To register as a new user, complete the following:

- 1. Go to Global Card Access at www.bofaml.com/globalcardaccess
- 2. From the Global Card Access login screen, click **Register New User**.
- 3. Enter your card Account Number.
- 4. Click Submit.
- 5. Complete the additional account information (Figure 2).

**Note**: Click the icon for addtional details, as needed.

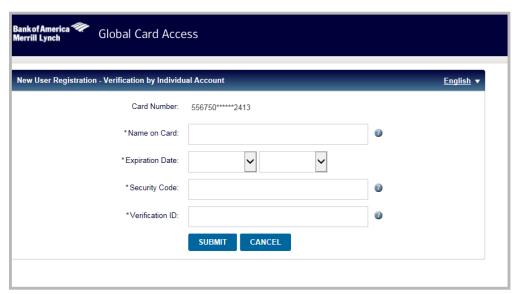


Figure 2: Complete Additional Account Information

6. Click Submit.

7. Define your **User ID** and **Password** (Figure 3).

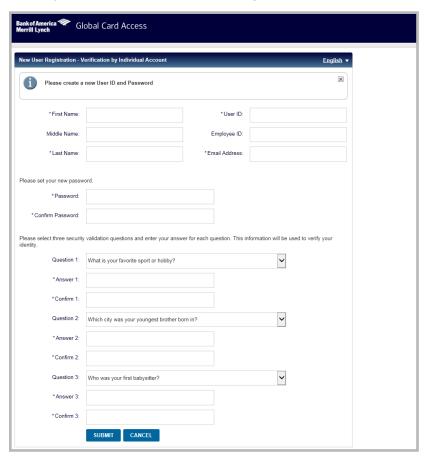


Figure 3: Define User ID and Password

- 8. Select three security validation questions and answers. This information will be used to verify your identity.
- 9. Click Submit.

10. Click **Accept** to acknowledge the Terms and Conditions (Figure 4). The Global Card Access login screen displays with a message confirming your registration is complete.

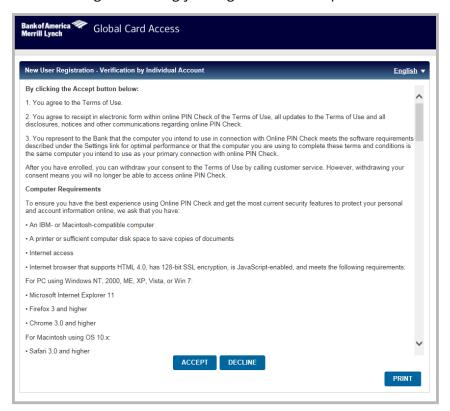


Figure 4: Accept Terms and Conditions

This completes the procedure.

# Log in as a Registered User

To log in to Global Account Access as a registered user, complete the following:

- 1. Go to Global Card Access at www.bofaml.com/globalcardaccess
- 2. Enter your **User ID**.
- Enter your Password.
- 4. Click **Login**. The Global Card Access home page displays.

This completes the procedure.

# Retrieving Your PIN

Once your registration is confirmed, you will be able to view the PIN Check navigation bar.

- 1. Log in to Global Card Access.
- 2. Click **Check Your PIN** or the PIN Check tab (Figure 5).

**Note**: If your company is only entitled to Online PIN Check, the Alerts tab and Manage Alerts button will not display.

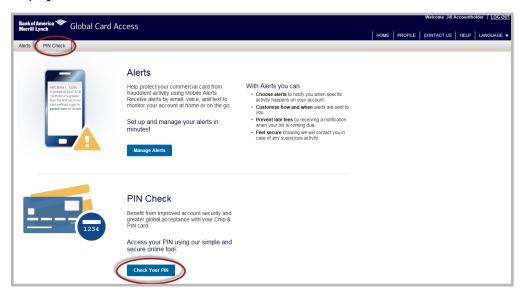


Figure 5: PIN Check Tab and Link

3. Enter your card's security code if the Security Code Form displays (Figure 6). The Security Code Form screen displays only when you are accessing PIN Check from a new device.

**Note:** The card security code is located on the back of your card and is the three digit number listed after your card account number.

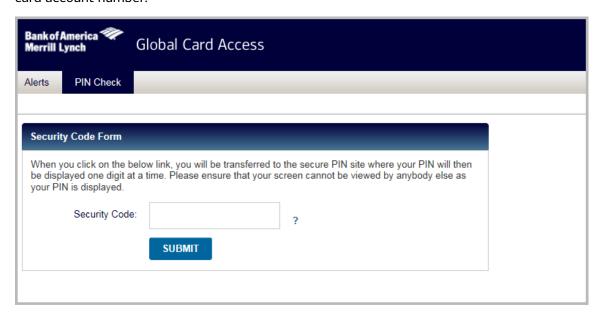


Figure 6: Enter Card Security Code

- 4. Click **Submit**. The secure Online PIN Check site displays and your PIN is displayed one digit at a time (Figure 7).
  - Notes:
  - Please ensure that your screen cannot be viewed by anybody else as your PIN is displayed.
  - If you miss any of the numbers, you can hit the **Back** button to view your PIN again.

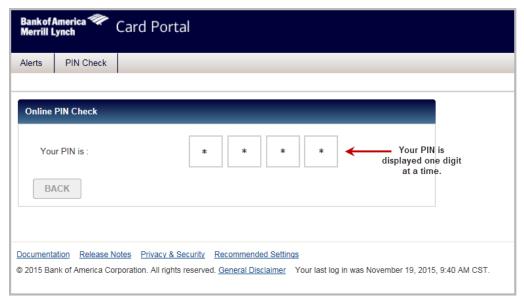


Figure 7: Online PIN Check Screen

This completes the procedure.