



# Sharefax Credit Union, Inc.

Let us help **build** your future!

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## Mobile Banking Enrollment Instructions

September 2009

1. Verify that the mobile device is a Co-Op Financial Supported Device.
  - a. Other requirements include:
    1. 128-bit SSL Support
    2. adequate device memory and processing speed
    3. operator security certificate
2. The enrollment process begins on the website where members identify their credit union and accounts, set up security questions and register their mobile devices.
  - a. <https://www.co-opmobile.org>
3. Enter the mobile phone number you want to use and click Next.

4. Enter your Primary Account Number at the Credit Union.
5. Select Sharefax Credit Union from the drop down list and click Next.

6. Enter both of the following and click Next:
  - a. Account holder's first and last names
  - b. Last 5 digits of the account holder's social security number.
  - c. If they are joint

7. Enter two of the following options on the next screen and click Next after each entry.
  - a. Enter the telephone number on record at the Credit Union and Click Next.

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Step 1 - Primary Account Information      Step 2 - Authentication

Phone #: 951-123-4567 > Credit Union: ABC Employees Credit Union > Credit Union Phone: 4048121300 > Account Number: 999119999

**Account Authentication**

Primary Account Number: 999119999  
 Member Credit Union: ABC Employees Credit Union  
 Name: Chenique Murphy  
 Last 5 Digits of Social Security Number: \*\*\*\*\*  
 Phone Number on Record with Credit Union:

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- b. Enter the Street Number on the primary account and click Next. This field only allows numeric characters; this should be street number only.

Step 1 - Primary Account Information      Step 2 - Authentication

Phone #: 951-123-4567 > Credit Union: ABC Employees Credit Union > Account Number: 999119999

**Account Authentication**

Primary Account Number: 999119999  
 Member Credit Union: ABC Employees Credit Union  
 Enter Name: Chenique Murphy  
 Last 5 Digits of Social Security Number: \*\*\*\*\*  
 Phone Number on Record with Credit Union: 1231234511  
 Street Number:

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- c. Enter the Zip Code on record at the Credit Union and click Next.
  - d. Enter Date of Birth and click Next. This should be the date of birth of the social security number previously entered.

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Step 1 - Primary Account Information      Step 2 - Authentication

Phone #: 951-555-4567 > Credit Union: CO-OP Mobile Demo CU > Credit Union Phone: 6788121300 > Account Number: 5005

**Account Authentication**

Primary Account Number: 5005  
 Member Credit Union: CO-OP Mobile Demo CU  
 Name: Mark N Jones  
 Last 5 Digits of Social Security Number: \*\*\*\*\*  
 Phone Number on Record with Credit Union: 555-987-6543  
 Street Number: 12  
 Zip Code: 43330  
 Date of Birth (MM/DD/YYYY): 07/04/1905

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8. After clicking Next following the second entry, the account nickname screen appears if you were successfully authenticated.
  - a. If you were not correctly authenticated a message will appear near the top advising you to contact the credit union. This is because the system can not verify the information you entered against the credit union records.
  - b. You may select the back button to correct previously entered information
  - c. A maximum of three attempts are allowed before enrollment for the account number is disabled.
9. Enter a Nickname for your mobile banking account and click Next.
  - a. The nickname will be displayed when you List Accounts from Mobile Banking.

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Step 1 - Primary Account Information      Step 2 - Authentication

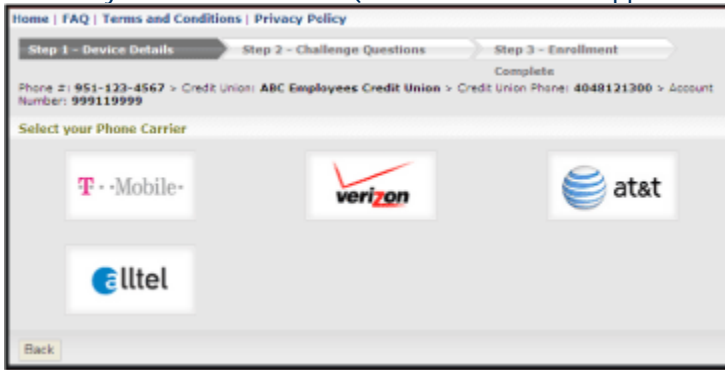
Phone #: 951-123-4567 > Credit Union: ABC Employees Credit Union > Credit Union Phone: 4048121300 > Account Number: 999119999

**Enter Account Nickname**

Enter Account Nickname:

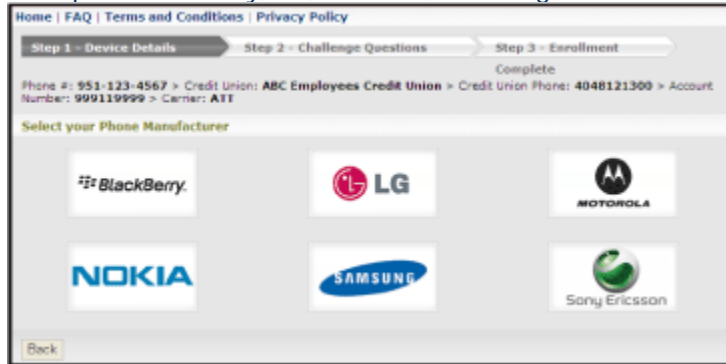
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10. Click on your wireless carrier (the next screen will appear automatically).



11. Click on the Manufacturer of your mobile device.

a. Examples: Blackberry, LG, Motorola, Samsung, etc.

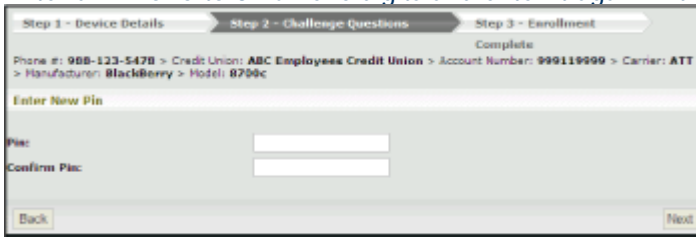


12. Click on your device model (the next screen appears automatically).

a. The model number is usually visible when you remove the battery. See your device manual for more information.



13. Enter a PIN of 6 to 8 numeric digits and enter it again in the confirm field and click Next.



14. Select three challenge questions on the left and provide answers on the right and click Next.

15. The word “Complete” should appear near the top of the page for a successful enrollment. (A text message will be sent to your phone, prompting you to install the application software.)
- Click “Yes” at the bottom of the screen after it’s shown “Complete” at the top.

16. The next screen shows an activation code. You will need this to begin using Mobile Banking on your phone.
- The activation code is valid for 24 hours.

### On Your Phone

- Go to Messages and locate the text message from [www.co-opmobile.org](http://www.co-opmobile.org).
- Open the message, select the URL, and select the download link or icon to begin the activation process. (You may need to confirm that you want to download the application or receive a warning message)
- Terms of Use will appear, highlight Next and press Enter.
- Read and Accept the Terms of Use.
- Select “I have one” and press Enter.
- Enter the Activation code, Mobile Number, and Mobile PIN (you selected earlier in this process).
- Highlight Submit and press Enter. An Activation Complete Message Appears.
- Highlight Next and press Enter. The application opens and the main menu appears.