



## Digital Banking Frequently Asked Questions

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### The Transition

**Q: Can Bank of Marin provide me with a Quick Reference Guide to assist me with the Online & Mobile Banking transition?**

A: Yes. There are quick reference guides available for customers with Personal Accounts and Business Accounts. [Click here](#) to find the appropriate guide or contact [Customer Support](#) for help.

**Q: Please tell me when Online & Mobile Banking will be unavailable during the transition.**

A: Online & Mobile Banking will not be available from 5PM on Friday, June 14th until 7AM on Monday, June 17th, when the new system will be available. Please refer to the appropriate Quick Reference Guide [here](#) to learn which functions will be disabled PRIOR to June 14th.

**Q: During the transition, will Bank of Marin extend their Customer Support hours?**

A: Yes. [Customer Support](#) can be reached at 866-626-6004, option 2  
From Monday, June 17th through Friday, June 21st, support will be available from 7AM – 7PM.  
On Saturday, June 22nd, support will be available from 9AM – 3PM.  
From Monday, June 24th through Friday, June 28th, support will be available from 7AM – 7PM.

**Q: Will I still need two separate Bank of Marin apps for my Personal and Business mobile banking?**

A: No. With the new digital banking platform, there will only be one Bank of Marin mobile banking app.

**Q: Will my current Bank of Marin mobile banking app work after Friday, June 14th?**

A: No. On June 17th, you should delete your existing Bank of Marin mobile app and download the new version via the Apple App Store or Google Play Store on your mobile device.

**Q: What should I do if my new mobile app doesn't work?**

A: Prior to calling Customer Support, please attempt to reinstall the new mobile app again. To do this, uninstall the mobile app, download and reinstall by accessing the mobile app in the Apple App Store or Google Play Store. If the issue still occurs, please contact [Customer Support](#).

**Q: Will Touch ID and Face ID be available?**

A: Yes. Fingerprint and facial authentication will be available on any eligible device.

**Q: What phones are eligible for Touch and Face ID for Mobile Banking?**

A: Eligible Android Devices are Samsung Galaxy S7 or higher, Nexus 7 or newer, Google Pixel first generation or newer. Eligible Apple Devices are iOS 10 or higher, iPhone 5S/6/6 Plus or newer.

**Q: Can I access the same functions and services via Mobile Banking that I do on my desktop?**

A: Yes, all the same functions and services are available on your desktop, tablet and smart phone.



**Q: How do I enroll in Online & Mobile Banking?**

A: Customers with Personal accounts may enroll online or visit any Bank of Marin branch. To ensure a smooth transition, the self-enroll functionality for Personal accounts will not be available until Monday, June 24th. Business customers must visit a Bank of Marin branch.

**Q: What are the system requirements to use Online Banking?**

A: For the best user experience, we recommend Windows 10, or Mac OS X 10.10

**Q: What internet browsers can I use to access Online Banking?**

A: Google Chrome, Mozilla Firefox, Microsoft Edge, Safari (Mac's only), and Microsoft Internet Explorer

**Q: Why can't I view my Statements and Notices?**

A: In order to view Statements & Notices, you must have Adobe/Acrobat Reader. You will be prompted to validate that Adobe/Acrobat Reader is functional the first time you review Statements or Notices online.

**Q: Can I use Quicken® or QuickBooks® with the new Online & Mobile Banking system?**

A: Yes. Quicken® and QuickBooks® programs are available on the new Digital Banking platform. [Click here](#) to find the appropriate conversion guide.

**Q: Can I use Online & Mobile Banking internationally?**

A: Yes. You will just need internet access. You may want to check with your carrier about international rates.

**Q: Can you explain the 'Link Account' button on my Online & Mobile Banking home page?**

A: This button takes you to our new Money Manager tool, which allows you to link accounts including credit cards, retirement, loans, etc. from other financial institutions to give you a full view of your assets. It also gives you the ability to categorize your Bank of Marin transactions. Just click the "Link Accounts" button from your Home-Accounts page, enroll in the Money Manager tool and follow the prompts.

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## **Passwords and Security**

**Q: Will my user ID and Password remain the same?**

A: The User ID will remain the same for Personal Accounts. For Business Accounts, the User ID will be a combination of current Company ID and current User ID (e.g. 123Admin!). All customers may choose to keep existing passwords, provided it meets new password requirements.

**Q: What are the new password requirements?**

A: Your password must be 8 characters long and contain 1 number, 1 lower case character, 1 upper case character and 1 special character.

**Q: Will my password ever expire?**

A: No. However, as a best practice to safeguard against hackers, it is important to change your passwords regularly.

**Q: What if I can't remember my password?**

A: Click on the 'Forgot Your Password' link from the login page for self-service password reset options.



**Q: How many invalid password attempts am I allowed before I am locked out?**

A: 3 attempts. After 2 invalid attempts, please use the 'Forgot Password' button from the login screen to avoid being locked out of Online & Mobile Banking.

**Q: Is the Online & Mobile Banking messaging system secure?**

A: Yes. This messaging system allows you to send sensitive information securely to Bank of Marin. You can also attach forms, documents, etc. within your secure message.

**Q: Why do I need a Secure Access Code to log in?**

A: The Secure Access Code is in place to add an additional layer of security for your Online & Mobile Banking accounts.

**Q: Why am I asked for a Secure Access Code every time I login?**

A: A Secure Access Code is requested when the digital banking platform doesn't recognize the computer you are logging in from. When you enter the Secure Access Code for the first time, select 'Register Device' and this should resolve the issue.

**Q: Where can Secure Access Codes be delivered?**

A: You can choose to receive Secure Access Codes via email, text message or phone call.

**Q: Does a Secure Access Code expire?**

A: Yes. A Secure Access Code is only valid for 15 minutes. You can request a new Secure Access Code at any time.

**Q: What should I do if I did not receive my requested Secure Access Code?**

A: Contact [Customer Support](#) at (866) 626-6004, Option 2 for research and resolution.

**Q: Why did I receive a Security Alert Notification?**

A: In order to keep you informed of activity impacting your accounts, Bank of Marin provides several security and transaction [alert options](#). Log in to Online & Mobile Banking to manage your alerts. If you have further questions, please contact [Customer Support](#).

**Q: Will my alerts be migrated to the new platform?**

A: Some of your alerts will be migrated. Log in to Online & Mobile Banking to review and manage your alerts. If you have further questions, please [click here](#) or contact [Customer Support](#).

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## **My Personal Account**

**Q: Will my user ID and Password remain the same?**

A: Your User ID will remain the same. You may choose to keep your existing password, provided it meets our password requirements.

**Q: I see I am no longer enrolled in Mobile Check Deposit. How do I re-enroll?**

A: To re-enroll in Mobile Check Deposit on the new Digital Banking platform, select 'Enroll in Mobile Check Deposit' under the Transactions menu, then follow the instructions provided. You must then log out and log back in again to enable the functionality.

**Q: Will my Bill Payments and funding-associated accounts be migrated to the new Online & Mobile Banking system?**

A: Yes. If for some reason, there is an issue, please contact [Customer Support](#) for assistance at 866-626-6004, option 2.



**Q: Will my account nicknames be migrated to the new Online & Mobile Banking system?**

A: Yes. If you want to add or change them, click Settings from the menu on the left-hand side of your Home-Account screen and choose Acct Preferences/Nicknames.

**Q: Will my scheduled transfers be migrated to the new Online & Mobile Banking system?**

A: Yes. You can view them in your Activity Center.

**Q: Will my Payees be migrated?**

A: Yes, with the exception of People Pay payees.

**Q: How do I use People Pay in the new Online & Mobile Banking System?**

A: For more information on the new People Pay service, please [click here](#).

**Q: What has changed about the People Pay service?**

A: The new People Pay service requires clients to have a Bank of Marin VISA® Debit Card, so transactions can now occur in real-time as opposed to the 3-5 business days it took before. With the new system, [People Pay](#) is also now available for Business customers.

**Q: What if I initiated a People Pay transaction on the old system and the receiver never claimed the funds?**

A: Review your account in the new system and verify that the funds have been returned to you. If they have, please initiate the transaction again. If they have not, contact [Customer Support](#) for research and resolution.

**Q: How do I see my transaction history on my account?**

A: Click on the account title from your Home-Account screen to view your transaction history.

**Q: How do I see account details such as balances and interest rates?**

A: Click on the Details link at the top of your transaction history page.

**Q: How do I see check images?**

A: Go to your transaction history and click on the desired transaction to view the images.

**Q: How do I see my deposited items?**

A: Go to your transaction history, click on the desired transaction, and then click on 'More Details' to view the listing of deposited items. Click on the desired item.

**Q: How do I categorize my transactions?**

A: Click the "Link Accounts" button from your Home-Accounts page, enroll in our new Money Manager tool and follow the prompts.

**Q: What is Money Manager?**

A: Our new Money Manager tool allows you to link accounts, including credit cards, retirement, loans, etc. from other financial institutions to give you a full view of your assets. It also gives you the ability to categorize your Bank of Marin transactions. Just click the 'Link Accounts' button from your Home-Accounts page, enroll in the Money Manager tool and follow the prompts.

**Q: How do I filter or search transactions?**

A: Click the 'Filters' link at the top of your transaction history page and select desired filters.



**Q: How do I print transactions?**

A: To print all transactions, click the 'Options' link at the top of your transaction history page and choose 'Print.' To print a specific transaction from your transaction history, click the desired transaction to expand, then click 'Options' and choose 'Print.'

**Q: Why do I not see a transaction in the Activity Center?**

A: You will see specific initiated Online and Mobile Banking transactions in the Activity Center, such as ACH, Wires, Funds Transfers. Bill Pay history will be found by selecting Bill Pay from the menu. People Pay transactions will appear in the account transaction history. If you need help, please contact [Customer Support](#) to research the transaction in question.

**Q: Can I see my statements online if I am receiving paper statements?**

A: Yes. Bank of Marin provides digital statements, tax forms and notices to all Online & Mobile Banking customers.

**Q: How do I opt-out of paper statements?**

A: Log into Online & Mobile Banking, click Statements & Notices from the menu, choose Delivery Preferences and follow the instructions.

**Q: Can I transfer money from my Bank of Marin account to my other bank?**

A: Yes. Click transactions from the menu and select Funds Transfer. To set up an external account, click Account Services and choose External Account – Add.

**Q: Can I place a stop payment through the new Online & Mobile Banking system?**

A: You can place stop payments on checks through either Online or Mobile Banking. To place a stop payment on an ACH/Preauthorized transaction, [contact any branch](#).

**Q: Can I order checks through the new Online & Mobile Banking system?**

A: Yes. Choose 'Account Services' from the menu on your home page and click 'Check Reorder.'

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## **My Business Account**

**Q: Will my user ID and Password remain the same?**

A: Your User ID will be a combination of your current Company ID and your current User ID (e.g. 123Admin!). You may choose to keep your existing password, provided it meets our password requirements. [Click here](#) to find the Business Online & Mobile Banking Quick Reference Guide for login details.

**Q: I see I am no longer enrolled in Mobile Check Deposit. How do I re-enroll?**

A: To re-enroll in Mobile Check Deposit on the new Digital Banking platform, select 'Enroll in Mobile Check Deposit' under the Transactions menu, then follow the instructions provided. You must then log out and log back in again to enable the functionality.

**Q: Will my Bill Payments and funding-associated accounts be migrated to the new Online & Mobile Banking system?**

A: Yes. If for some reason, there is an issue, please contact [Customer Support](#) for assistance at 866-626-6004, option 2.

**Q: Will my scheduled transfers be migrated to the new Online & Mobile Banking system?**

A: Yes. You can view them in your Activity Center.



**Q: Will my Payees be migrated?**

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**Q: Will my ACH and Wire templates be migrated to the new Online & Mobile Banking system?**

A: Yes.

**Q: Will my physical token still work?**

A: No. You should have received instructions on installing and using Symantec® VIP soft tokens. If you have not received these instructions, please contact [Customer Support](#).

**Q: Why am I being asked to provide my Token Security Code TWICE?**

A: The very first time that a new Symantec® VIP soft token is used, the approver will have to enter 2 codes. After entering the first security code, they must wait for their token to refresh (30 seconds) and then enter the next token one that is presented.

**Q: Can two users have one token credential ID?**

A: Yes. An example would be when there is a sole proprietor of the business who wants to send an ACH, which requires 2 approvers.

**Q: Where do I go with questions about my secure Symantec® VIP Token?**

A: Contact [Customer Support](#).

**Q: Are the requirements for ACH and/or Wire Approvals changing?**

A: The approval process for both ACH & Wires now requires the use of a Symantec® VIP soft token. ACH will still require 2 approvers, one of whom can also be the person who drafts the transaction, provided they have that authority. Wires will require 1 approver who is a different User ID from the person who drafts the wire.

**Q: Where does my business manage users, recipients, ACH and wires?**

A: From the menu on your home page, choose 'Business' to see a listing of your business services. For more information or to request this service, please contact [Customer Support](#).

**Q: Where do I find ACH & Wire transactions and activity?**

A: From the menu on your home page, click 'Transactions' and choose Activity Center.

**Q: How do I see my transaction history on my account?**

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**Q: How do I opt-out of paper statements?**

A: Log in to Online & Mobile Banking, click 'Statements & Notices' from the menu, choose 'Delivery Preferences' and follow the instructions.

**Q: Can my business make tax payments online?**

A: If your business has been entitled for the service, yes. For more information or to request this service, please contact [Customer Support](#).

**Q: Can I place a stop payment through the new Online & Mobile Banking system?**

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