

Coast Central Credit Union's Business Online Banking will allow you, the business owner, to review accounts/transactions, make transfers, view statements, add users, initiate Automated Clearing House (ACH) transactions (for businesses enrolled in ACH), and much more. Check out our website for additional online & mobile banking features.

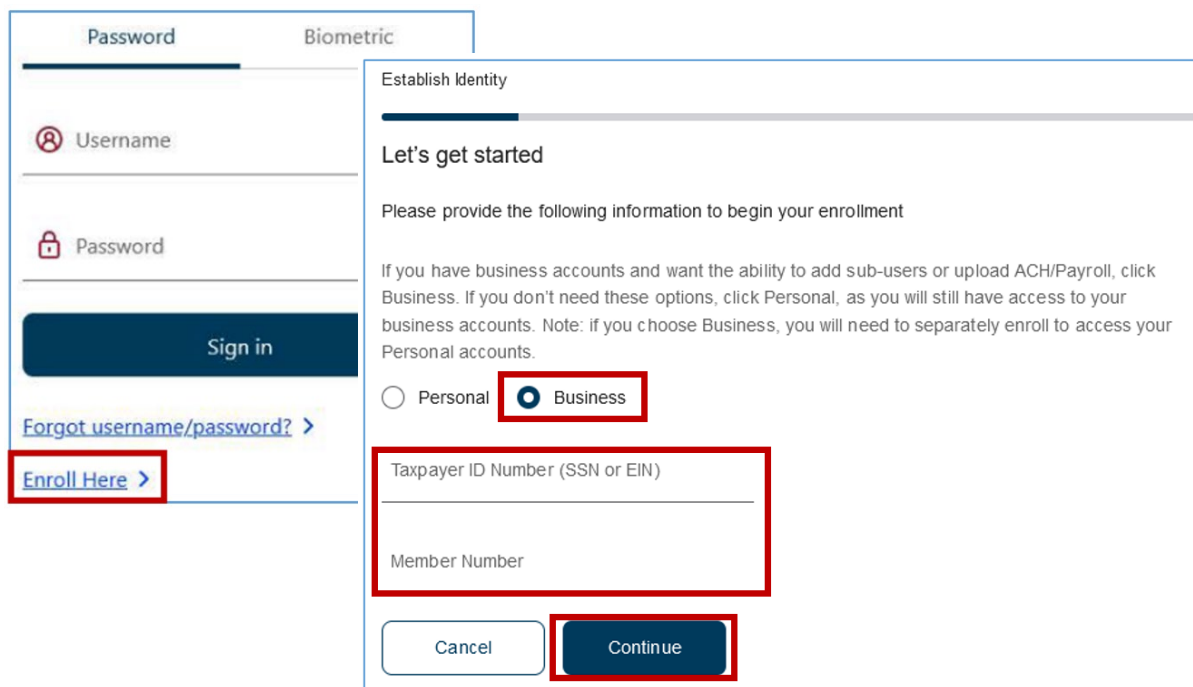
**Existing or New Business Member Enrollment:**

1. Download the app or go to [coastccu.org](https://coastccu.org).
2. Click **Enroll**.
3. Click the **Business** radio button.
4. Enter the TIN used for the business (this may either be an SSN or EIN depending on the business).
5. Enter the Member Number of the business account and click **Continue**.
6. Verify the email address associated with the business account then click **Continue**.

**Note:** If the business does not have an email on file with the Credit Union click **Continue** to select a phone number to send a secure access code to. If all contact information is not current, an authorized signer of the business account will need to contact Coast Central to update the information.

7. Create a username and password then click **Continue**.
8. Review the username, read, and agree to the [Terms & Conditions](#).
9. Click **Confirm and Enroll**.
10. Return to the login page and login.

**Note:** If an ACH user, contact Member Business Services to activate your ACH services immediately or access will be available the following business day.



The screenshot displays two side-by-side panels from the Coast Central Credit Union enrollment interface. The left panel is the login/sign in screen, featuring a 'Password' and 'Biometric' toggle at the top, followed by input fields for 'Username' and 'Password', a 'Sign in' button, and links for 'Forgot username/password?' and 'Enroll Here >'. The right panel is the 'Establish Identity' screen, which includes a progress bar, the heading 'Let's get started', and instructions: 'Please provide the following information to begin your enrollment'. Below this, it states: 'If you have business accounts and want the ability to add sub-users or upload ACH/Payroll, click Business. If you don't need these options, click Personal, as you will still have access to your business accounts. Note: if you choose Business, you will need to separately enroll to access your Personal accounts.' There are two radio buttons: 'Personal' and 'Business' (which is selected). Below the radio buttons are two input fields: 'Taxpayer ID Number (SSN or EIN)' and 'Member Number'. At the bottom of the right panel are 'Cancel' and 'Continue' buttons.

ACH & Wire Templates will not convert from the previous Online & Mobile Banking system. Please ensure you have saved your template information prior to March 18<sup>th</sup>, 2024.

## Accepting Granted Business Access:

The user will receive an invitation via email to create a personal login, use an existing personal log in (if they already have one), or deny the invitation.

1. Click the link provided in the email invitation.
2. The user will select one of the four options. (See image for option explanations)
  - a. The first three options will have the user either sign into their **Personal** login or enroll as a **Person** to the Online & Mobile Banking system.

**Note:** The user **must** use their personal information to enroll, not the business information or use an existing personal login to accept the user access.

- b. The last option will deny the access.
3. Follow the on-screen instructions then login to Online & Mobile banking with your **Personal** login information.

Welcome to online banking

Humboldt Business LLC would like to give you access privileges for their Coast Central Credit Union account.

Please select from the following options:

- I am enrolled in Coast Central Online and Mobile Banking.
- I am a member, but I am not enrolled in Coast Central Online and Mobile Banking.
- I am not a member of Coast Central, but I would like to access the account
- I know Humboldt Business LLC, but I do not want this account access

- User has a personal login already created in OLB
- User has a personal account but has not enrolled in OLB
- User is not a member and does not have a personal log in
- User will deny access to the business account

Establish Identity

Let's get started

Please provide the following information to begin your enrollment

If you have business accounts and want the ability to add sub-users or upload ACH/Payroll, click Business. If you don't need these options, click Personal, as you will still have access to your business accounts. Note: if you choose Business, you will need to separately enroll to access your Personal accounts.

Personal  Business

Social Security Number / Enrollment Code

Member Number

Cancel Continue

Establish identity

Let's get started

Please provide the following information to begin your enrollment.

First name

Last name

Date of birth (MM/DD/YYYY)

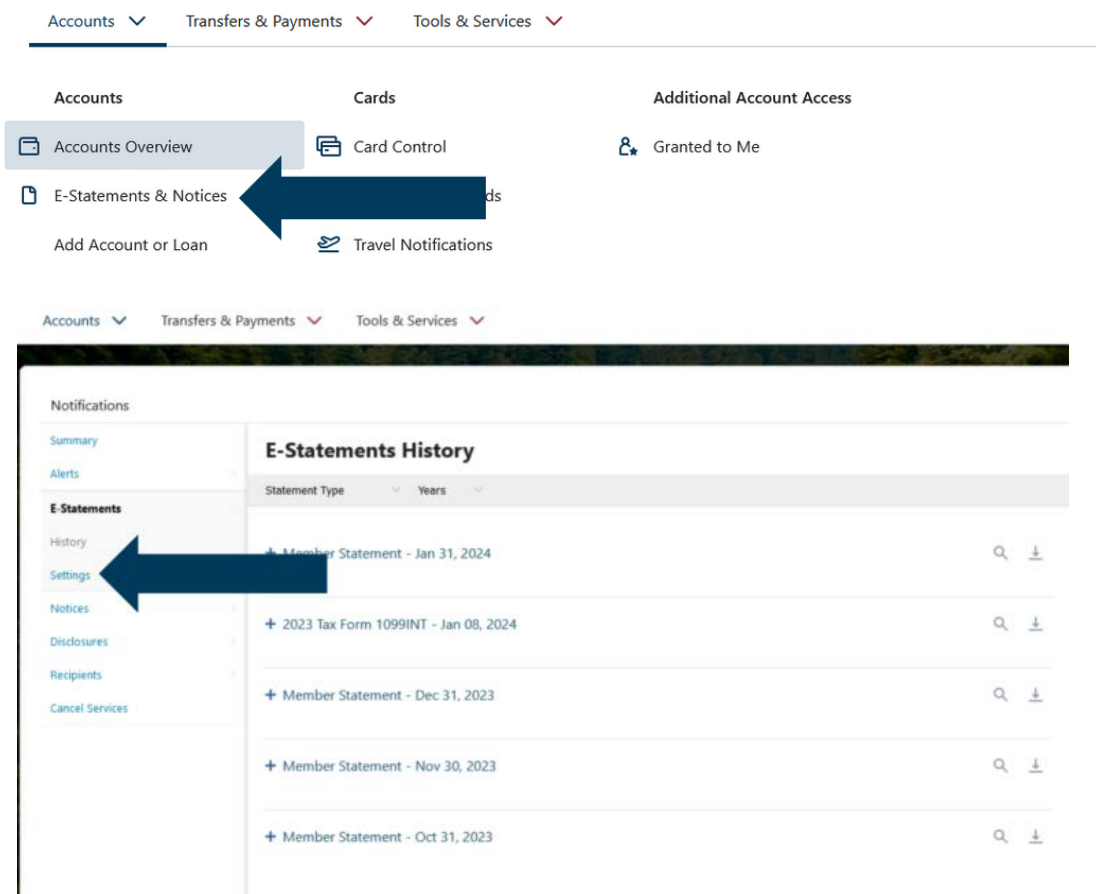
Social security number (SSN)

Enter your Date of Birth and SSN

## E-Statement Enrollment Guide

E-Statements are a fast, easy, and secure way to get your monthly statements in a timely manner. You'll be notified through your email/mobile device that your statement is available. You can access it through Online or Mobile Banking:

- From the Menu, click "E-Statements & Notices".
- Select the account that you want to opt into E-Statements.
- Click on E-Statements, then Settings.
- Complete Delivery Preferences (Email or SMS Text), and Save Changes.
- You are now set-up to use E-Statements!



Upon activating your email or phone number, you are now enrolled in E-Statements, E-Alerts, and E-Notices. To manage your Email addresses and Cell Phone numbers go to **"Recipients"** on the main menu. Please call us at (707) 445-8801 for assistance.