



# CARD MANAGEMENT

*Card Management is a FREE feature of Reliance State Bank's Online Banking and the RSB Mobile App that lets users manage all of their RSB debit cards in one place - with a single login.*



## Use it With:

- ✓ RSB Debit Card
- ✓ RSB Health Savings Account Debit Card

## Get Started Today!

This Quick Start Guide will help you take advantage of Card Management's key features. You are also invited to review the Frequently Asked Questions section of the Card Management web page for more information.

*Card Management is an easy, self-service tool that is loaded with valuable features for cardholders. If you do need assistance, please contact us.*

## Contact Us

-  Story City: 515-733-4396  
Garner: 641-923-2801
-  [www.rsbiowa.com/contact-us/](http://www.rsbiowa.com/contact-us/)



# Digital Banking Users

## Existing Online Banking Users

1. If you are an existing Online Banking user and don't have the RSB Mobile App, you can use Card Management within Online Banking. It's not required that you download the RSB Mobile App. However, you will be missing out on the convenience of having access to the tool right in the palm of your hands 24/7. For instance, if you're traveling or even just away from your computer while you are at work or out for dinner, the RSB Mobile App allows you to respond quickly to any alerts.
2. When you log in to Online Banking, you will land on what's called the Dashboard. Locate the **More** tile on the dashboard. Under the **Account Management** heading, click on "**Card Management**" to get started setting your preferences for your RSB debit card(s).

## New RSB Mobile Users

1. If you are not an RSB Mobile user, start by signing up for your Reliance State Bank's Online Banking.
2. Once your Online Banking account is approved, download the RSB Mobile App from Google Play or the App Store, depending on your type of device.
3. Login to the RSB Mobile App and locate the **More** tile at the bottom of your dashboard.
4. Under the **Account Management** header, click on "**Card Management**".
5. Get started on setting your card management preferences for your RSB debit card(s).

## Existing RSB Mobile Users

1. Login to the RSB Mobile account and locate the **More** tile at the bottom of your dashboard.
2. Under the **Account Management** header, click on "**Card Management**".
3. Get started on setting your card management preferences.

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## Card Management Installation

Card Management will be automatically installed within Online Banking. There is nothing Online Banking users need to do for it to be installed.

If you are an RSB Mobile App user, Card Management will be pushed to your device. If your device is set to make automatic updates to Apps, there is nothing you need to do. The "Cards" tile will appear at the bottom of the app.

If you are an RSB Mobile App user that has elected to make manual updates to Apps on your device, you will need to manually initiate the update for Card Management to appear within the RSB Mobile App.

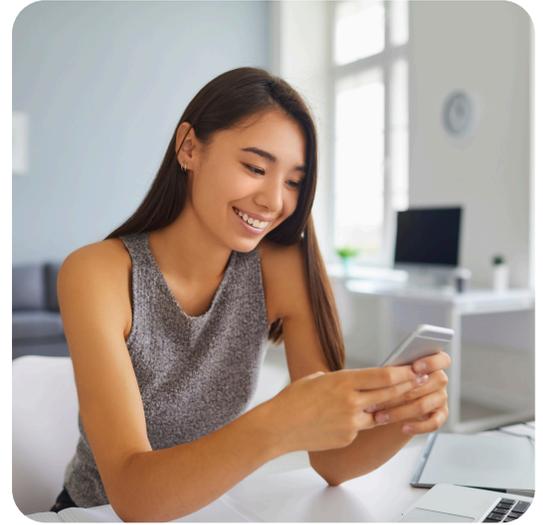
# Card Management's Features

## Start Using Card Management

Once you login to either Online Banking or the RSB Mobile App you're ready to start using Card Management.

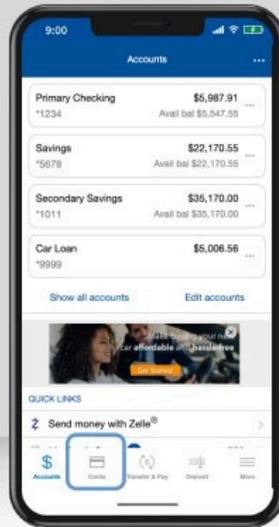
On the following pages we provide illustrations that describe step-by-step, on how to use the most common Card Management features.

Card Management is very intuitive, but again, if you get stuck or just want some advice regarding how to set your preferences for the way you like to use your debit card(s), please contact us.

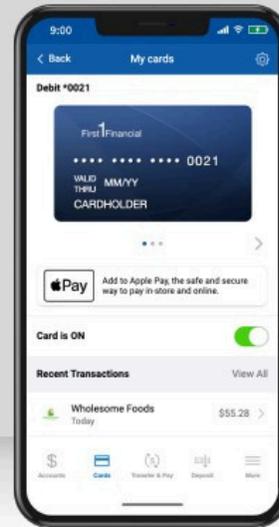


## CARD MANAGEMENT FOR MOBILE BANKING

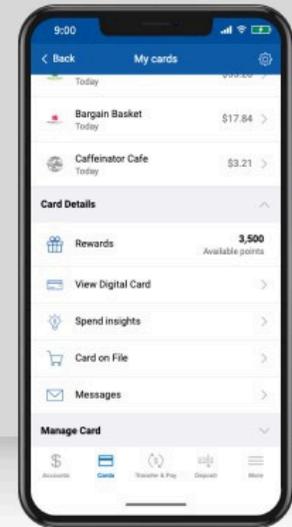
### Getting started with card management



After logging in, tap "Cards" to get started.



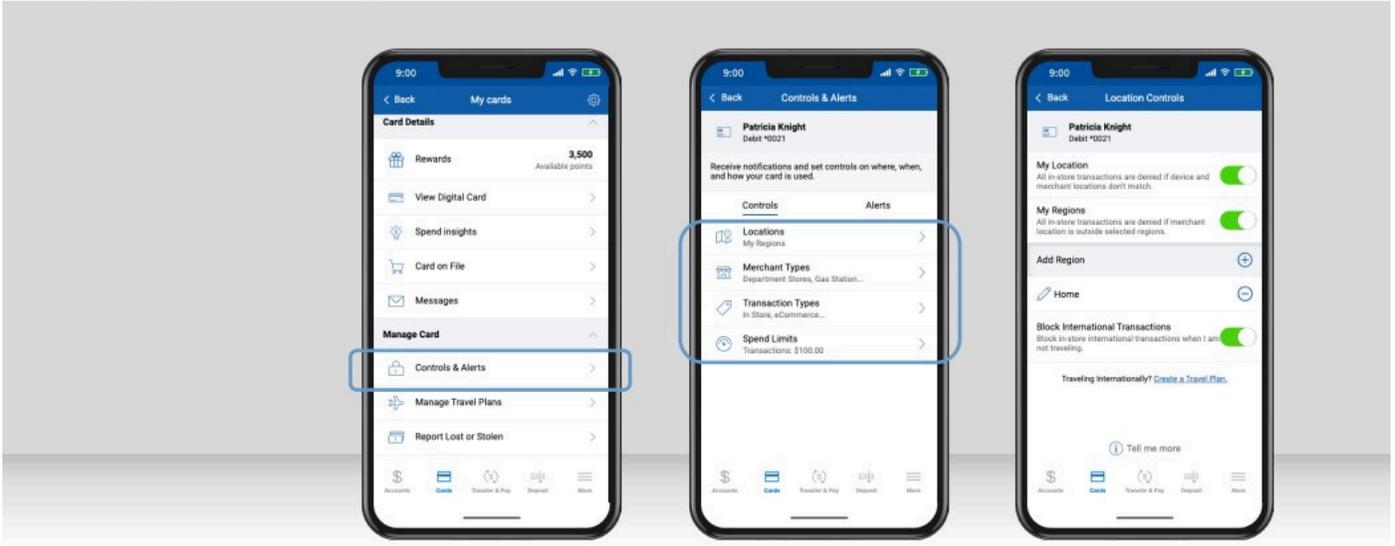
- Turn your card on/off.
- View any recent transactions.
- Swipe through the carousel to add or view additional cards.
- Add your card to your digital wallet (Apple Pay, Gpay).



- Scroll down for more options:
- View digital card, including your card number.
  - View spend insights.
  - See which merchants store your information.

# Card Management's Features

## Setting up card controls (part 1)



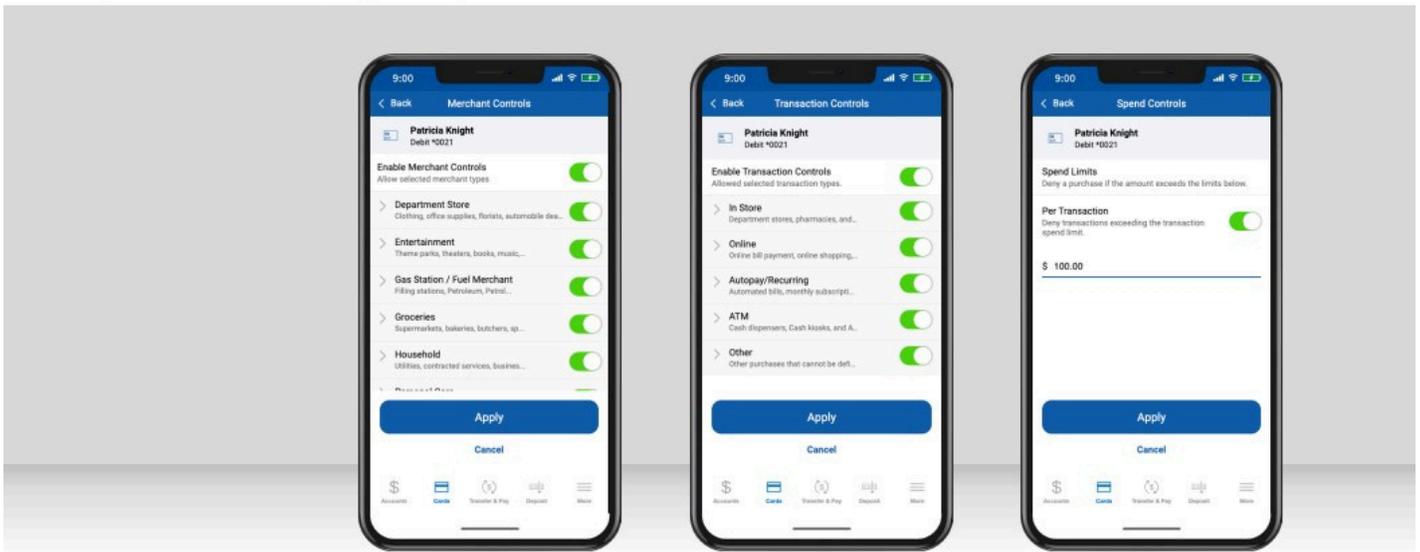
Tap "Controls and Alerts" to choose how your card is used.

Use Controls to manage

- Locations,
- Merchant Types,
- Transaction Types,
- And Spend Limits.

Enable "My Location" to limit transactions to your phone's GPS, and "My Region" to set geographic boundaries. You can also block all international transactions.

## Setting up card controls (part 2)



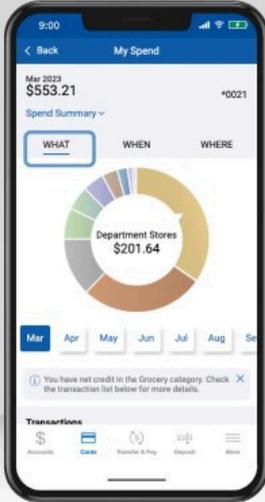
Select the **merchant types** you want to allow by tapping the toggle for each. When finished, "Apply."

Select the **transaction types** you want to allow by tapping the toggle for each. When finished, "Apply."

**Spend Controls** put a cap on your spending by limiting transaction amounts. Turn on the toggle, enter your desired amount, and "Apply."

# Card Management's Features

## Viewing spend insights



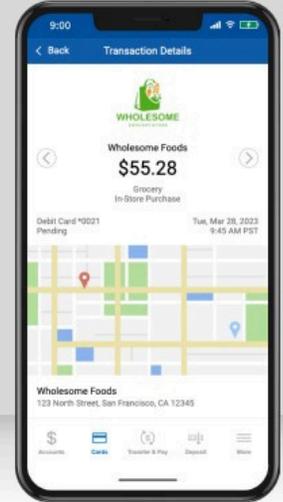
Tap "What" to view a breakdown of your spending categories.



Tap "When" to view a breakdown by month.



Tap "Where" to view the location of your transactions on a map.

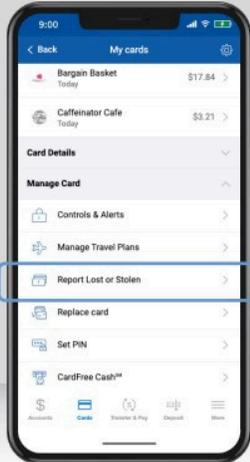


Tap on a transaction to view the merchant's name, logo, map, and contact information.

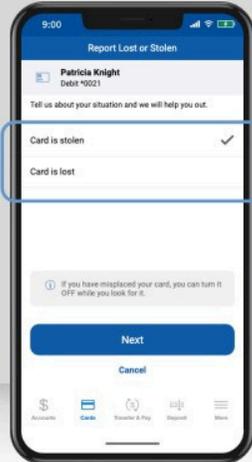
## Reporting a lost or stolen card



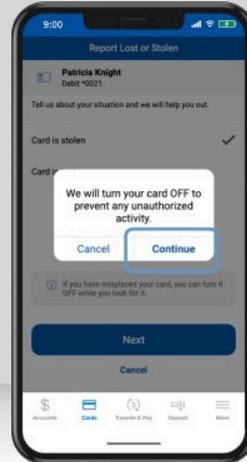
Tap "Manage Card" under your missing card.



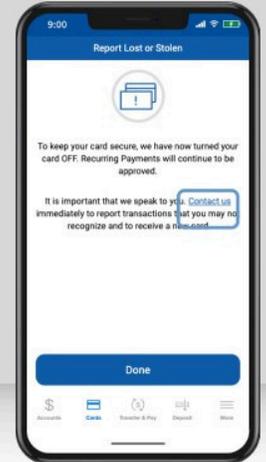
Tap "Report Lost or Stolen."



Specify whether the card was lost or stolen and add additional notes. Tap "Next."



Tap "Continue" to disable your card.



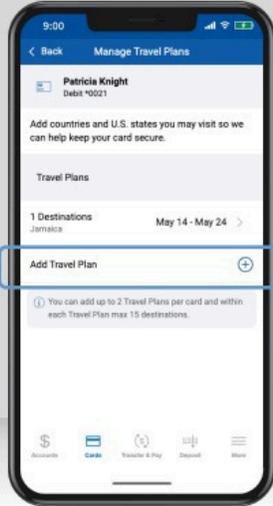
Then tap "Contact us" to dial our customer service line. We'll get a new card on its way.

# Card Management's Features

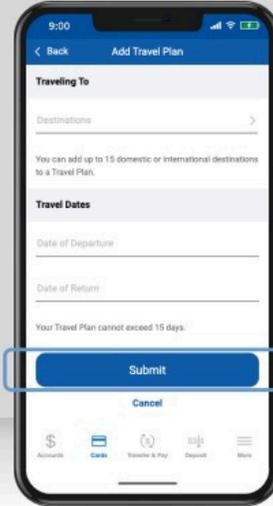
## Adding travel plans



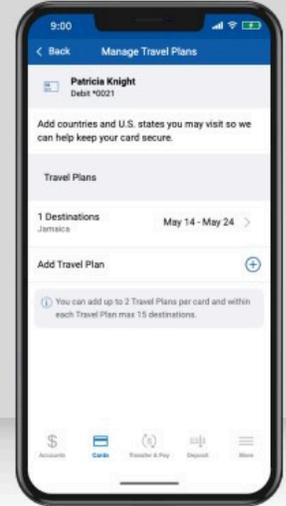
To add upcoming travel plans, tap "Manage Card," then "Manage Travel Plans."



Tap "Add Travel Plan" to add the countries and U.S. states for your trip.

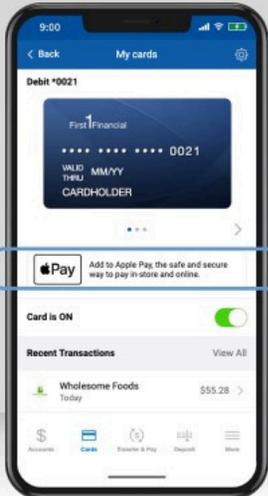


Enter your destination(s), dates of departure and return, and tap "Submit."



Once submitted, it will display on the "Manage Travel Plans" screen. You can edit or delete it at any time.

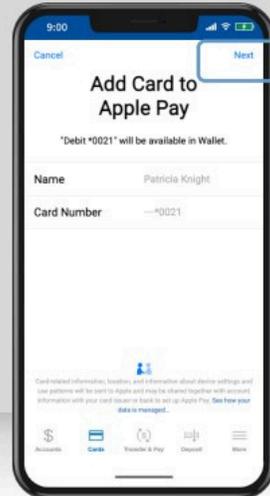
## Adding cards to your digital wallet for iOS users



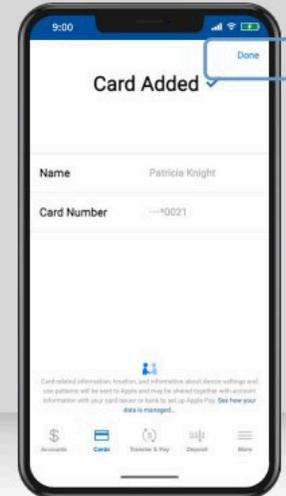
To add a new card to your digital wallet, tap the Apple Pay icon.



For iOS users, tap "Add to Apple Wallet."



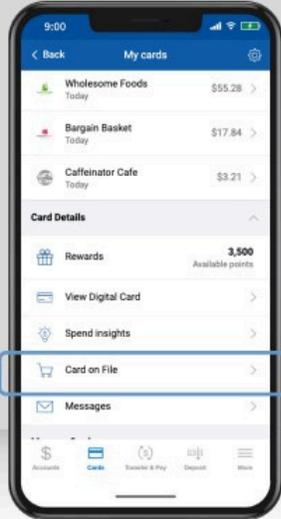
Your card information is pre-filled. Just tap "Next" to add it to your digital wallet!



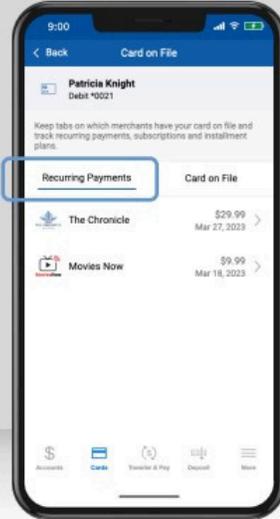
Once added, you'll see a confirmation screen. Tap "Done" to return to your mobile app.

# Card Management's Features

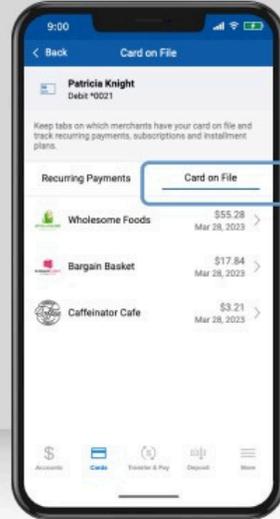
Viewing merchants, recurring payments, and your card(s) on file



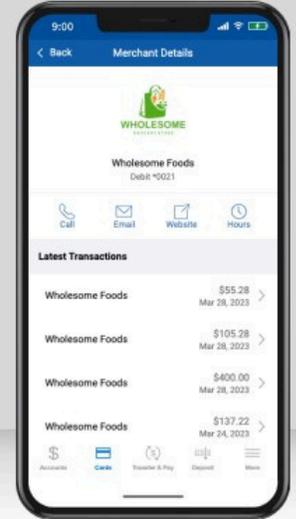
To see which merchants store your card, tap **"Card on File"** under Card Details.



**"Recurring Payments"** shows merchants that have your card stored for subscription services, like video streaming or utilities.



**"Card on File"** shows merchants that have stored your card for future use, like online shopping or ride share services.



Tap on a merchant to view their details, including any recent transactions and their contact information.

## You're All Set

Reliance State Bank is excited to be able to provide its customers with the added peace of mind that Card Management offers.

If you have any questions about how to take full advantage of Card Management, please contact us or stop by the bank and we would be glad to help you.

If you are concerned about any notifications received regarding your debit card(s), don't hesitate to give us a call or utilize Card Management's **"Toggle Off"** switch for the card in question until the issue is resolved.

