



# First Citizens Digital Banking Commercial Advantage™

## *Legal Administrator Checklist*

### Getting Started

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- Now that you are ready to begin using Commercial Advantage, use these resources to provide a helping hand whenever needed.
  1. Get started with the [Basic Navigation Quick Reference Guide \(PDF\)](#).
  2. Use the [Adding and Managing Widgets Video](#) to customize pages and tabs. We recommend keeping the Notification widget at the top of the screen. This is how you will receive important information from First Citizens.
  3. Use the [Creating Alerts Quick Reference Guide \(PDF\)](#) to establish alerts as needed. Also available is a [Creating an Alert Video](#) for instructions to set up alerts that can be useful for your business.
  4. Set up recurring or future dated payments, review the available Payments & Transfers resources within the [Commercial Advantage Learning Center](#).
  5. Set up templates, review the available resources within the [Commercial Advantage Learning Center](#).
  6. Use the [Creating New Contacts Video](#) to setup contacts quickly.
  7. Set up custom reporting, if applicable, using the [Custom Reporting Video](#).
  8. Install the First Citizens Commercial Adv mobile app from the Apple App Store or Google Play Store (if applicable). Use the [Mobile Banking Application Quick Reference Guide \(PDF\)](#) to get started.
  9. Set up additional users with the [User Management Quick Reference Guide \(PDF\)](#) which provide instructions on this activity, as well as setting up new user permissions, approval limits and more with the [Managing Permissions Video](#).
    - Fill out and provide your new users with the [New User Checklist](#).
  10. For additional assistance with any of the above, contact your First Citizens Implementation Specialist to schedule a live training.