



First Citizens Digital Banking Commercial Advantage™

New User Checklist

Getting Started

- 1. Your username is: _____
- 2. You'll receive an email with your username and a link to set up your password. This link will expire within seven (7) days.
- 3. Get started with the [Basic Navigation Quick Reference Guide \(PDF\)](#).
- 4. 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.
- 5. 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.
- 6. Set up recurring or future dated payments, review the available Payments & Transfers resources within the [Commercial Advantage Learning Center](#).
- 7. Set up templates, review the available resources within the [Commercial Advantage Learning Center](#).
- 8. Use the [Creating New Contacts Video](#) to setup contacts quickly.
- 9. Set up customized reporting, if applicable, using the [Custom Reporting Video](#).
- 10. 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.