Readiness Checklist

Synovus Gateway Digital Commercial Banking

On April 25, 2022, we will replace the Business Banking Center (BBC) and Business Internet Banking (BIB) with Synovus Gateway[SM] – our enhanced digital commercial banking solution. To ensure a seamless transition, below are recommended actions to prepare in advance, as well as important first-time access instructions.

- See complete details about your transition to Synovus Gateway at synovus.com/gatewaycommercialmigration.
- Register now for live, instructor-led orientation training at synovus.com/gatewaytraining.
- View videos and recorded training to help you get started on April 25 at synovus.com/gatewaycommercialresources and bookmark the page for ongoing reference.

Get ready! Actions to complete **by Friday, April 22**:

☐ **1.** **Verify your contact information by Monday, April 11. This is a critical step to ensure receipt of your Login ID.**
Log in to the BBC to verify your contact information on file and make any needed updates by **April 11.** *Note: Valid phone number and email address are required to receive a one-time Secure Access Code via text message, email, or voice call to access Synovus Gateway. Your business email address is also required to receive critical communications, including your Synovus Gateway Login ID.*

☐ **2.** **Review the resources available at synovus.com/gatewaycommercialmigration to know what to expect.**
- The Transition Guide provides detailed information about Treasury Management services, FAQs, and the amended Treasury Management Services Master Services Agreement for review.

☐ **3.** **Verify receipt of your Synovus Gateway Login ID.**
All Synovus Gateway Login IDs are provided to Administrators via direct mail. Also, to ensure receipt, Login IDs will be sent to all Administrators and users via email from **customercare@synovus-email.com**. *Note: If you do not receive your Login ID by April 19, <u>call</u> Synovus Customer Care at 1-888-SYNOVUS (796-6887) and say "Gateway."*

☐ **4.** **Note important information about Treasury Management services.**
See synovus.com/gatewaycommercialmigration and the Transition Guide for details supporting additional Treasury Management services, such as ACH, Wire Transfer, Remote Deposit, and more. *Note: Saved ACH and Wire payment instructions and scheduled payments will migrate to Gateway. However, ACH related reports, including historic batch reports, ACH returns, and EDI, will not transition, so be sure to download and save the reports you wish to retain.*

☐ **5.** **Delete outdated user information and payment databases to ensure only active users and valid databases transition.**
To ensure only valid user and database information is migrated to Synovus Gateway, please review users and permissions within BBC to verify service and account access is properly aligned, delete outdated information, and delete user information for those who no longer have access. Also delete payment databases and recipients no longer in use.

☐ **6.** **If you authorize ACH or Wire payments, download and install the Symantec VIP Access Manager app. This is a critical step that must be completed to avoid uninterrupted payment authorization.**
See the Symantec VIP Token Guide at synovus.com/gatewaycommercialmigration for download and registration instructions. *Note: Hard tokens will be replaced by soft (digital) tokens. Token authentication will not be required at log in, but will be required for transaction authorization.*

☐ **7.** **Register now for Synovus Gateway orientation training.**
Prepare for your transition to Synovus Gateway digital commercial banking by joining our virtual orientation series. We'll prepare you to get up and running with your new treasury management portal, covering ACH and Wire Transfer service modules. Also, BBC Administrators won't want to miss the administration orientation. Sessions will be offered **April 14-21** and are open to all BBC Administrators and users. Visit synovus.com/gatewaytraining to register. Recorded webinars are also available for those unable to attend the live webinars.

>> *See other side for log in instructions and actions to complete on Monday, April 25.*

Let's go! Actions to complete on **Monday, April 25**:

☐ **1. First time log in instructions:**
To log in for the first time, go to the **synovus.com** Home page:
- From the "Manage Your Account" drop down menu, select **Synovus Gateway**;
- Click or tap **First time login?** and enter your **Synovus Gateway Login ID** (enclosed and provided by email) into the "Login ID" field and click or tap **Submit**;
- On the Select Secure Access Code Target page, click or tap your desired contact method – either text, email, or voice call – to generate a Secure Access Code;
- When the code arrives, enter the code on the Secure Access Code page and click or tap **Submit**;
- Enter a password, then re-enter it in the Confirm Password field and click or tap **Submit**.

Need assistance? Contact Customer Care at 1-888-SYNOVUS (796-6887) and say "Gateway." See the Transition Guide for additional first-time log in information.

☐ **2. Familiarize yourself with the Synovus Gateway Home page, menu, and practice navigation.**
Review the main menu and services, the Home page, and how your information has carried over. The Home page is always your landing page for convenient access to services, account overview, and quick actions. If you are an Administrator, familiarize yourself with how to manage users and your company policy by reviewing the Manage Users demo and User Management Guide at synovus.com/gatewaycommercialresources.

☐ **3. Download the Synovus Gateway mobile app.**
To download the Synovus Gateway mobile[1,2] app, go to the Apple App Store on an iOS device or Google Play® on an Android® device. Then, search for "Synovus Gateway" and follow the prompts to install. For device requirements, see the Transition Guide at synovus.com/gatewaycommercialmigration.

☐ **4. Register your Symantec VIP Access Manager soft token. If you authorize ACH or Wire payments, this is a requirement.**
If any users who approve ACH and Wire payments have not already installed the Symantec VIP Access Manager and provided their token credential, Administrators should obtain and enter those credentials within Gateway following the system prompt. See synovus.com/gatewaycommercialmigration for instructions in the Symantec VIP Token Guide.

☐ **5. Review and establish Alerts.**
From the Home page, navigate to **Settings** > **Alerts.** Review and select the notifications you'd like to set up; or, change your alert delivery preference for important events, account status, and transactions. Add **synovusgatewayalerts@business.synovus.com** to your safe list to ensure receipt of auto-generated alerts.

☐ **6. Establish Statement Notifications.**
From the Home page, navigate to **Settings** > **Statement Notifications**. Review and select the account statements for which you'd like to receive a recurring notification of availability.

Additional resources and assistance
synovus.com/gatewaycommercialresources provides important reference documentation, including comprehensive user guides, service module videos, and recorded training. Be sure to bookmark the page for ongoing reference.

For additional assistance, call Synovus Customer Care at 1-888-SYNOVUS (796-6887) and say "Gateway."