



Online Banking: Digital Card Management

User Guide

Revised June 2023



Overview

This document contains helpful guidance on managing your cards anytime, anywhere from our mobile banking applications.

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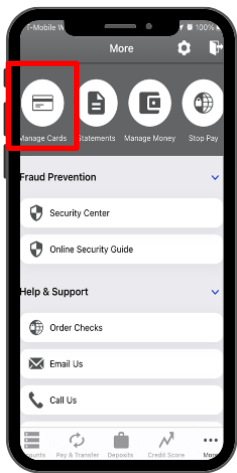
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Getting started with card management



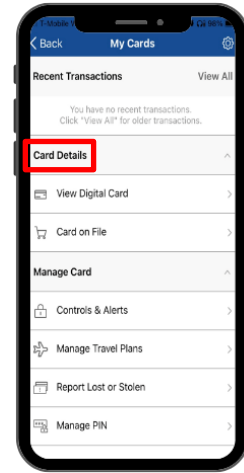
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- 1 After logging in to your mobile banking app, you will be taken to the Accounts screen. Tap **“Manage Cards”** to get started.

- 2 You will be brought to your card controls dashboard. Here you can **view your cards, turn your cards on or off, add your card to your digital wallet, view transactions, access card controls, and view your card information.** Tap **“View Digital Card”** to see your card information.

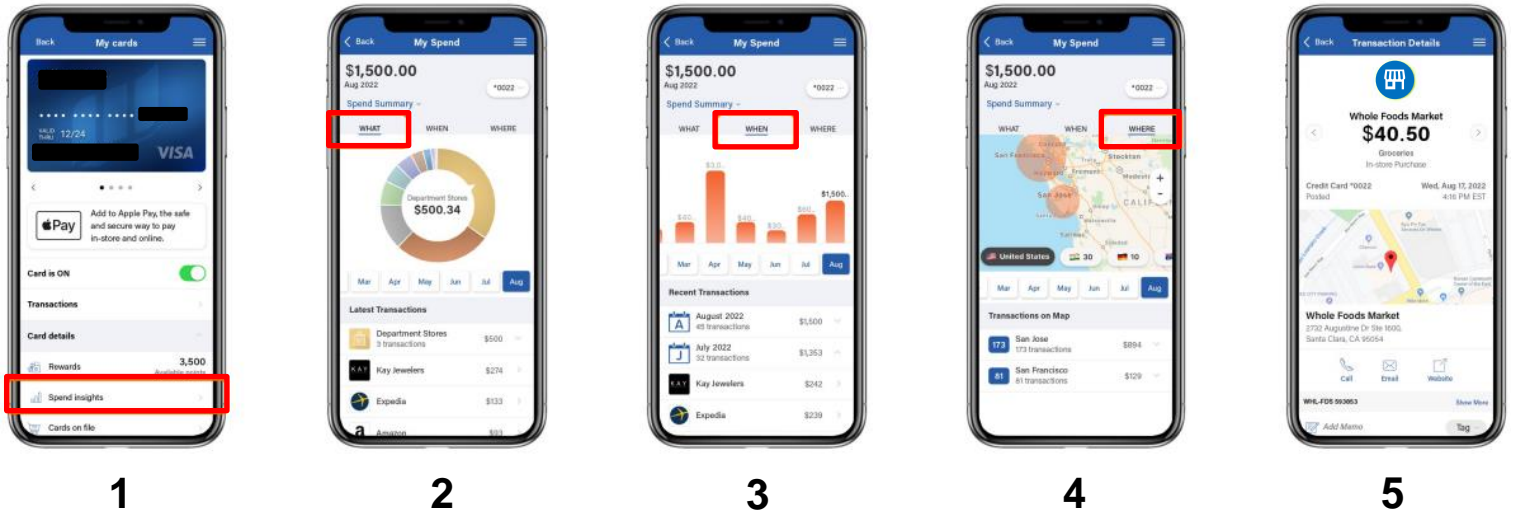
- 3 Your card information will display onscreen for 1 minute and 40 seconds. Tap **“Close”** to go back to the card controls dashboard.

- 4 From the dashboard, scroll to the Card Details menu to **view spending insights and see where cards are stored on file.**

- 5 Continue scrolling to the Manage Card menu to **access card controls and alerts, set a travel plan, report a card as lost or stolen, and manage your PIN.**



Viewing spend insights



1 From the card controls dashboard, you can gain insights into your spending habits on your cards. Scroll down and tap **“Spend Insights”** under the Card Details menu.

2 You will be taken to a screen that shows a breakdown of your **spending by category** under the **“What”** section.

3 By tapping **“When”**, you can also view your **spending by day(s) and month(s)** to see trends in your spending habits.

4 By tapping **“Where”**, you can view the location of your transactions on a map.

5 When you tap on a transaction, you can view the **merchant’s name, logo, address, phone number, and exact location!** If you don’t recognize the purchase, you can touch base with the merchant using the information provided.



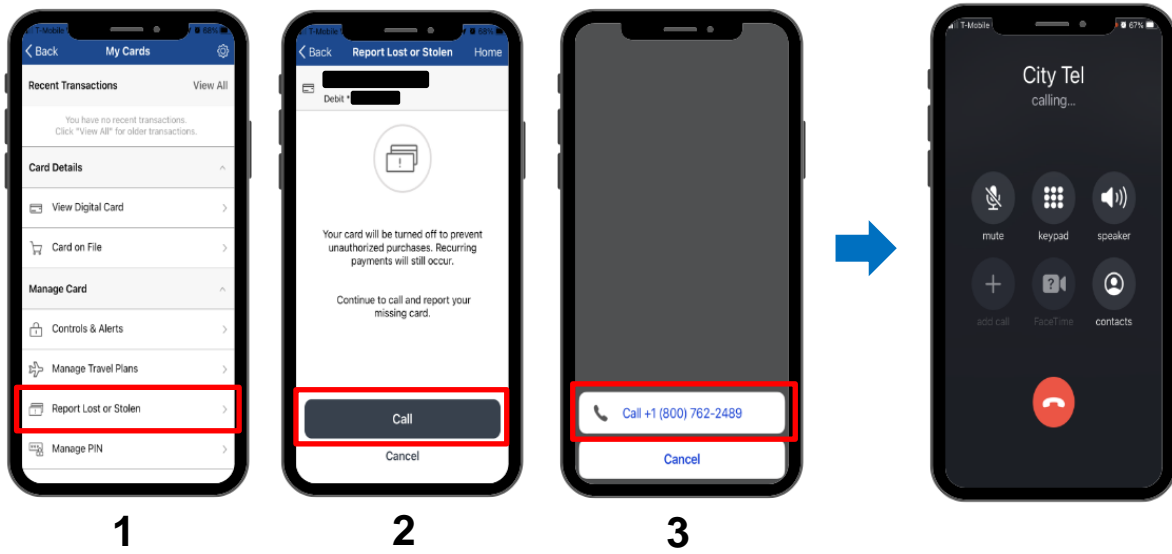
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Setting up card controls



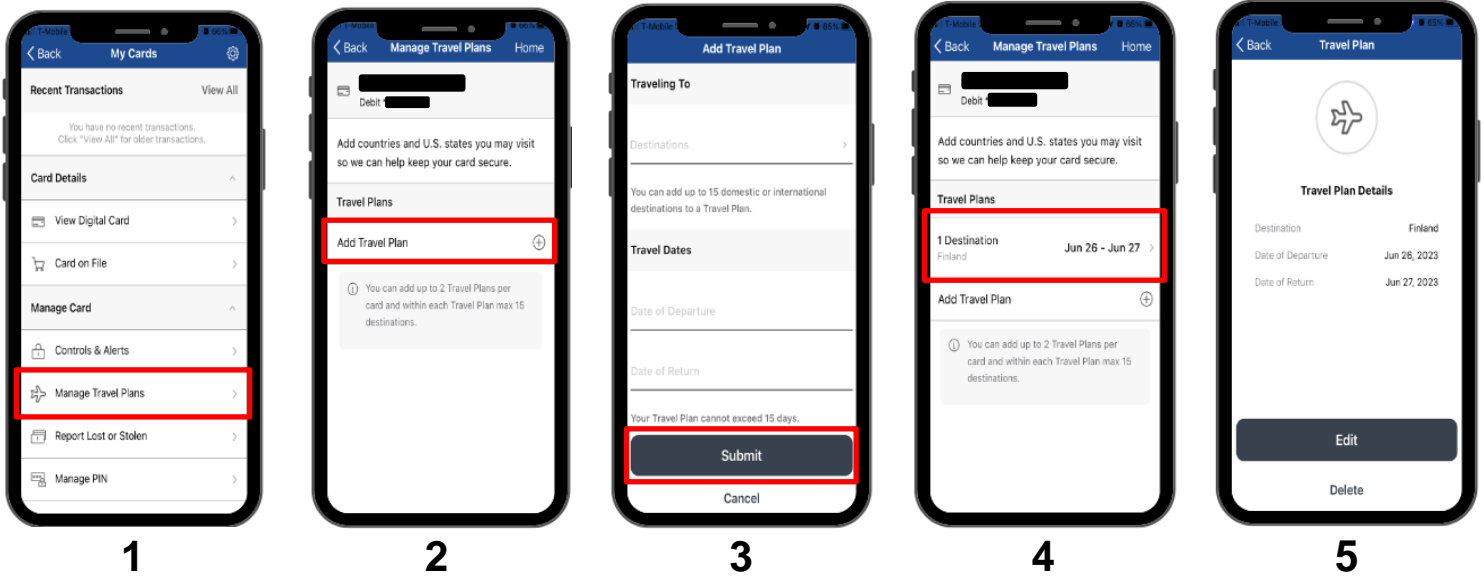
- 1 From the card controls dashboard, scroll down and tap **“Controls and Alerts”** under the Manage Card menu to access card controls and alerts.
- 2 Under “Controls”, depending on the card control feature you’d like to enable, tap on either **“Locations”**, **“Merchant Types”**, **“Transaction Types”**, or **“Spend Limits”**.
- 3 Under Location Controls, you can enable **“My Location”** which will check if you are in the vicinity of the merchant where the card is being used, and **“My Region”** for geographic boundaries. If the in-person transaction meets all your control preferences, it will go through!
- 4 Under Merchant Controls, you can select which **merchant types** are allowed for transactions on your card. To enable or disable a merchant type, toggle the green switch to the right of the merchant type and tap **“Save”**.
- 5 Under Transaction Controls, you can select which **transaction types** are approved for your card (e.g., in store, online, and autopay). To enable or disable a transaction type, toggle the green switch to the right of the transaction type and tap **“Save”**.
- 6 Under Spend Controls, you can cap your spending to stay on budget by setting your transaction and spending limits. Simply toggle the green switch next to the control, enter the amount, and tap **“Save”**!

Reporting a lost or stolen card



1. If your card goes missing, there is no need to panic! From the card controls dashboard, simply scroll down and tap **“Lost/Stolen”** under the Manage Card menu.
2. After tapping “Call”, you will be prompted to call our customer service line for assistance. Simply tap **our phone number** to get everything squared away!
3. By calling us straight from your mobile app, this ensures a smooth and seamless user experience. Losing a card can be stressful, but with card management – you can stay in control!

Adding travel plans



1

From the manage card dashboard, tap **“Manage Travel Plans”** under the Manage Card menu to add upcoming travel plans.

2

Tap **“Add Travel Plan”** to add countries and U.S. states you may visit to ensure you can use your card without interruption while traveling.

3

Enter your destination(s), date of departure, and date of return, and tap **“Submit”**.

4

Once you’ve updated your travel plan, it will display on the “Manage Travel Plans” screen. **Tap an existing travel plan** to view, edit, or delete.

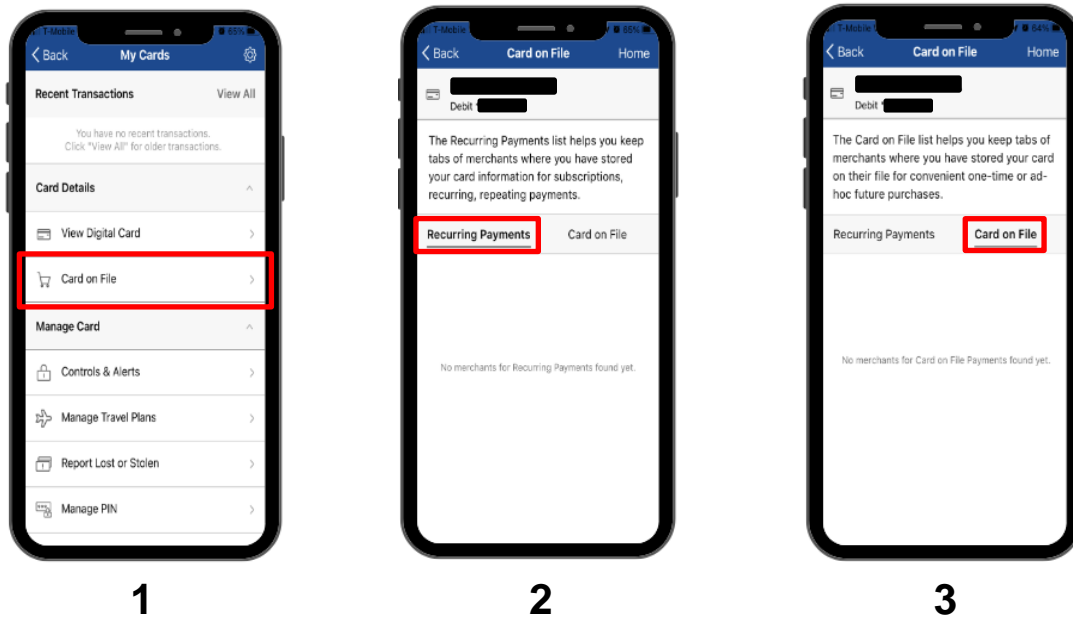
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See your travel plan details and edit if needed. You’re all set and ready to travel without a worry!



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



1

To see which merchants have stored your card(s), tap **“Card on File”** under the Card Details menu.

2

Under **“Recurring Payments”**, you can view all the merchants that have your card stored for a subscription service (e.g., video streaming and electrical services).

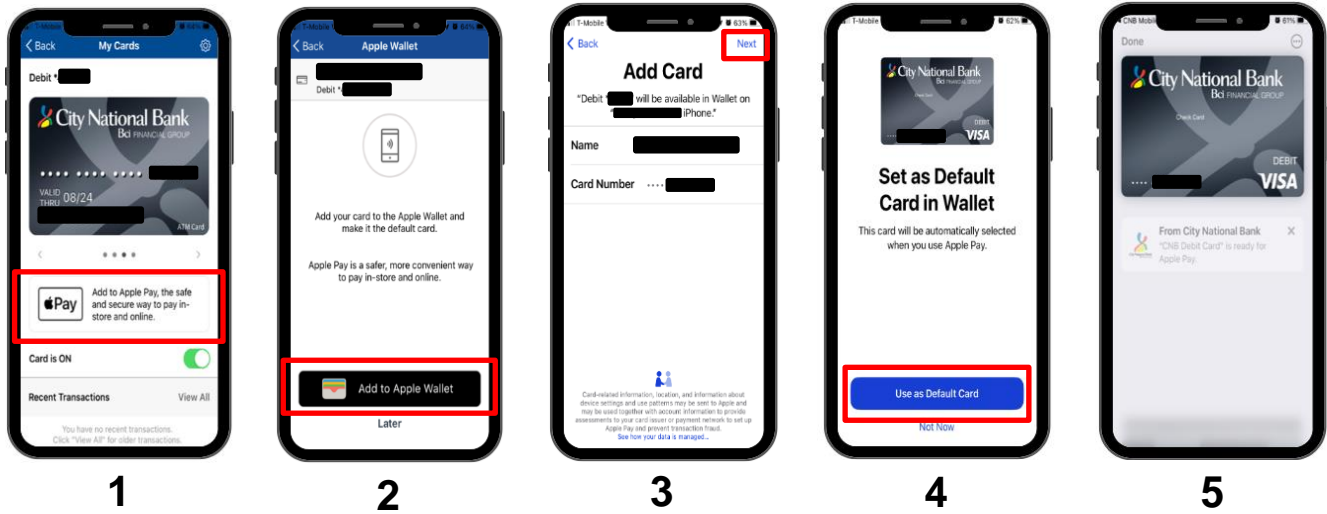
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The **“Card on File”** tab showcases every merchant that has stored your card for future use (e.g., online shopping and ride share services). This ensures that only trusted merchants have your data!



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Adding cards to your digital wallet for iOS users



- 1 To add a card to your digital wallet, tap the **“Add to Apple Pay®”** shortcut on the card controls dashboard.¹
- 2 For iOS users, tap **“Add to Apple Wallet”**.
- 3 You will be brought outside of your mobile app to your operating system’s interface where your card information is pre-filled. All you have to do is tap **“Next”** to add it to your digital wallet!
- 4 To set this as your default card for digital purchases, simply tap **“Use as Default Card”**.
- 5 Once you’ve added the card to your digital wallet, you’ll see **“<Card Name> is ready for Apple Pay”** under the card you’ve added. You’re all set and ready to use the card in your digital wallet!

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Need assistance? We're here for you.

If you have any questions or need additional assistance, please do not hesitate to contact our CNB Support team Monday through Friday, from 8:00 a.m. through 6 p.m. ET at 305-448-6500, or message us using our contact form: <https://www.citynational.com/contact-us>

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