

Truist Online Banking

Tips for Troops and Service Units

Each Troop or Service Unit bank account comes with an online banking account. Per the council’s Troop Banking Guidelines, there is only one user ID/password established per online banking account. Since all signers are responsible for maintaining the troop bank account, the user ID and password for accessing the online account should be shared with each authorized signer. Passwords should be changed whenever there is a change in signers on the account or there is a possibility that your ID or password have been compromised.

This guide provides some tips and tricks for navigating the Truist online banking account website.

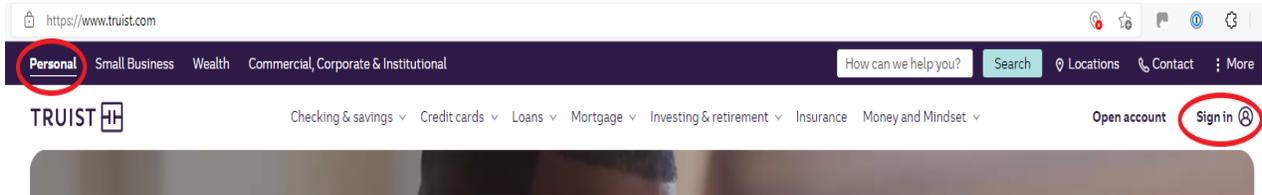
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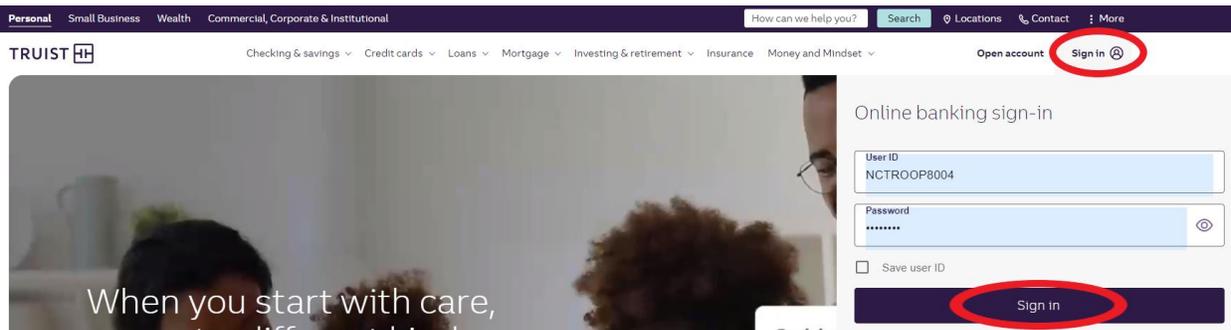
Log In

Authorized troop bank account signers can access their online banking account from Truist.com. There is just one online banking User ID and Password per bank account that all authorized signers share.

1. From the truist.com homepage, select the drop-down button to “Sign in”.

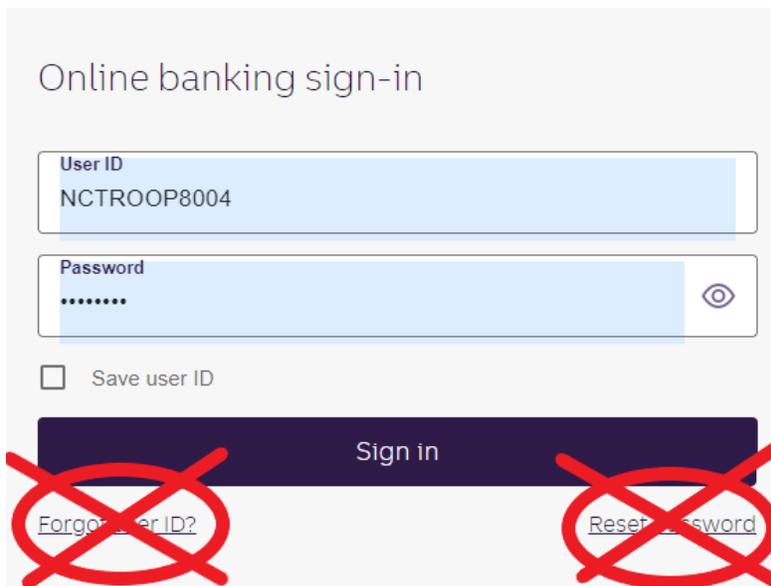


2. Enter your User ID and Password, then click the purple “Sign in” button.



Recover Lost Password or Unlock a Locked Online Account

Due to the unique structure of our troop and service unit bank accounts, **the option to “Reset your Password” online will NOT work.** If you have lost your password or been locked out of your account, please contact the council at troopbanking@nccoastalpines.org or 800-284-4475 and we can have the bank reset the password for you.



Online banking sign-in

User ID
NCTROOP8004

Password
.....

Save user ID

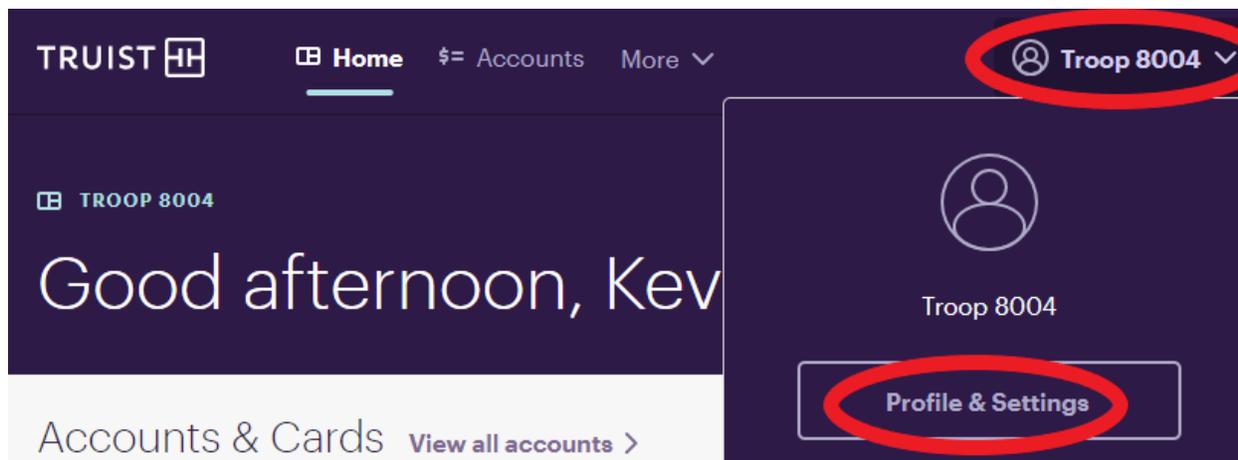
Sign in

[Forgot User ID?](#) [Reset Password](#)

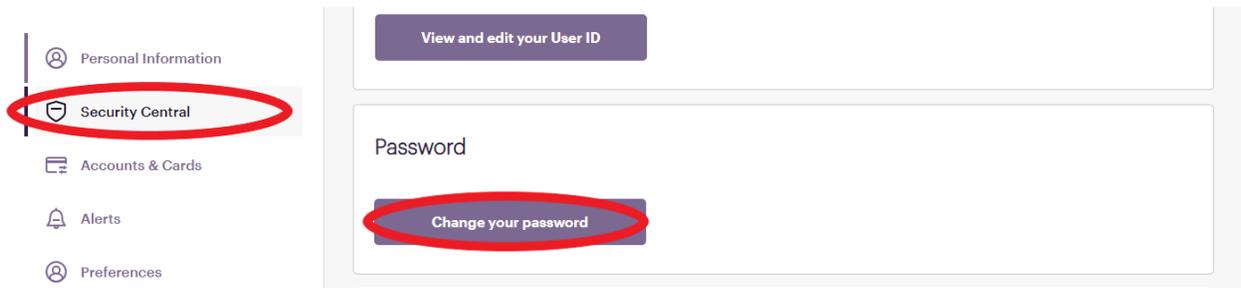
Update Password

You can update your online banking password as needed to ensure the security of the account.

1. First, sign into your online account (see instructions for “Sign In”).
2. From your online banking Dashboard, select the person icon in the upper right-hand corner, then choose “Profile & Settings”.



3. From the "Personal Information" screen, select "Security Central" from the left-hand menu, then select "Change Password".

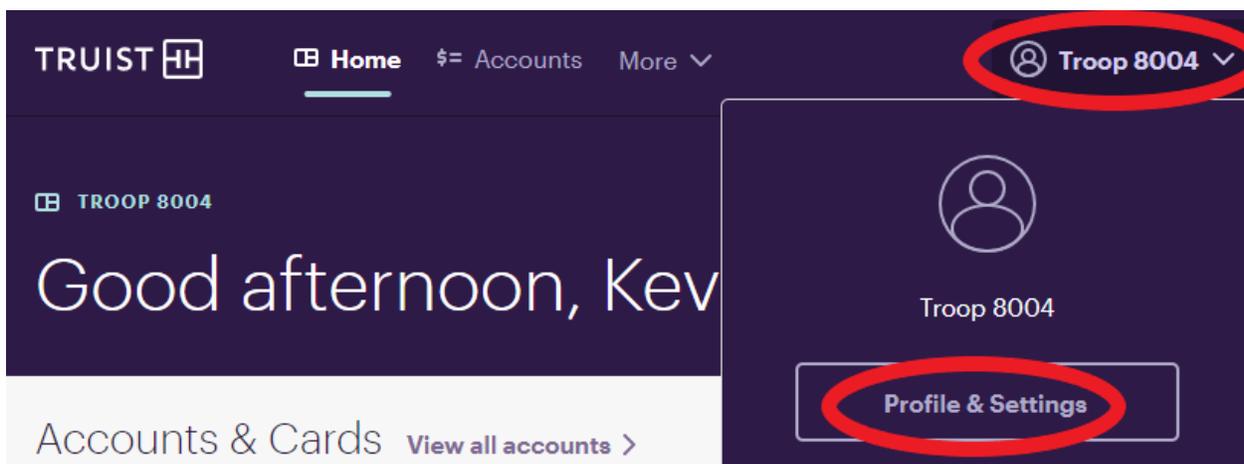


4. The "Change Password" sidebar will open and enable you to update your password. Be sure to share the new password with ALL authorized signers on the bank account. There is just one set of log-in credentials (User ID, Password, and Security Questions) that ALL authorized signers share.

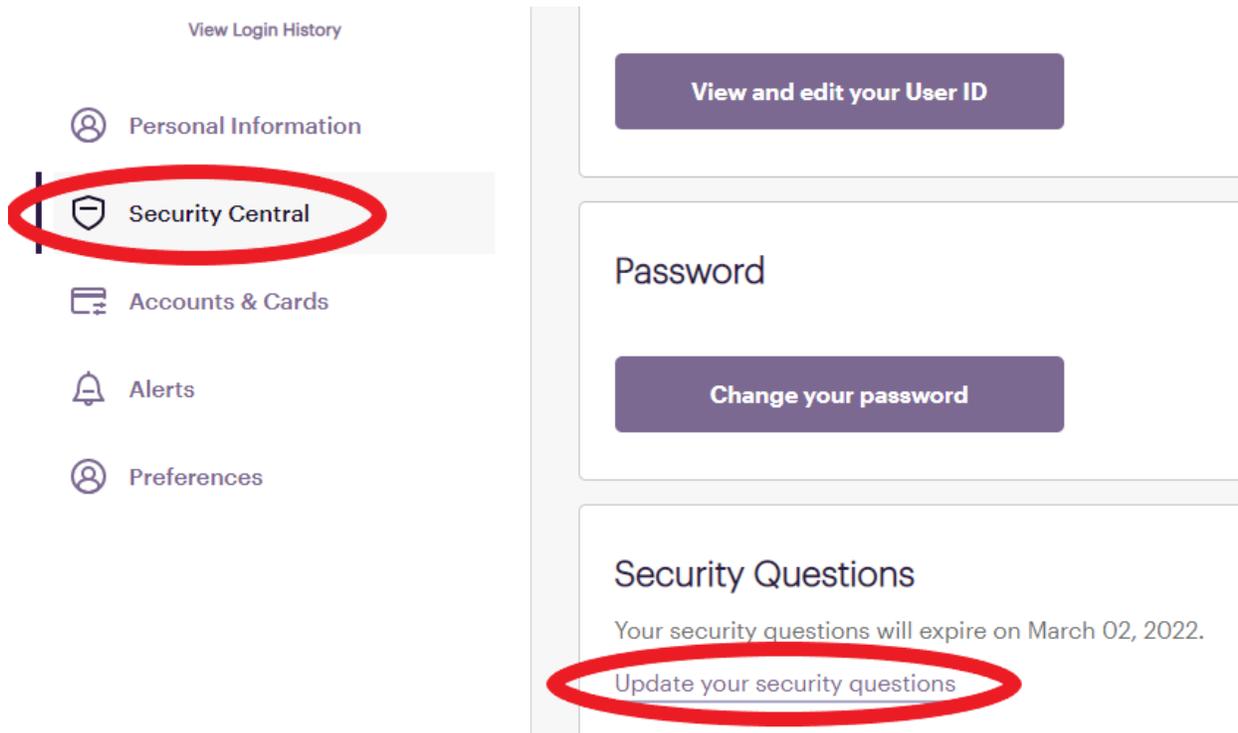
Update Security Questions

You can update your security questions as needed to ensure the security of the account.

1. First, sign in to your online account (see instructions for "Sign In").
2. From your online banking Dashboard, select the person icon in the upper right-hand corner, then choose "Profile & Settings".



3. On the "Personal Information" screen, select "Security Central" from the left-hand menu, then select "Update your security questions".



4. This will open a Security Verification window. You will need to verify your account by answering an existing security question.

A 'Security Verification' window. The title is 'Security Verification'. Below the title, it says 'To verify your identity, please answer your security question.' The question is 'What city was your first elementary school in?'. There is a text input field with the placeholder 'Write your answer here' and a toggle icon on the right. Below the input field are three buttons: 'Submit' (grey), 'Verification Help' (white with purple border), and 'Cancel' (white with grey border).

**If you don't know the existing security questions, just reach out to the council at troopbanking@nccoastalpines.org or 800-284-4475 and we can assist you.*

5. Once you have been verified, a new window will open for you to set new security questions.

Security Questions

Your questions expire on March 02, 2022.

Security questions provide an additional way for us to verify your identity. Your answers should not include special characters or include information posted on public or social sites.

You'll need one question and answer from the three sections below.

Question 1

Answer 1

Question 2

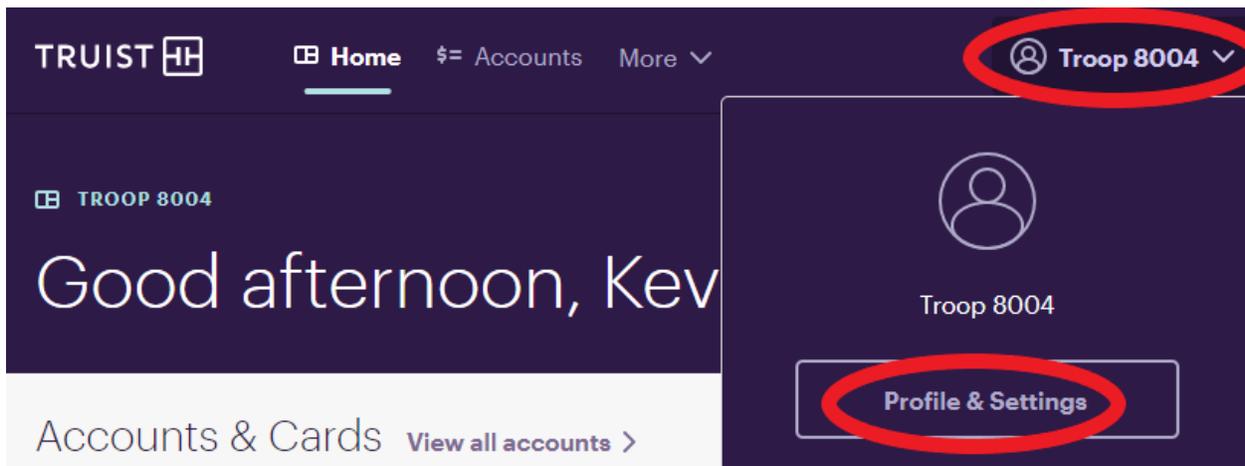
Answer 2

6. Be sure to share the new password with ALL authorized signers on the bank account. There is just one set of log-in credentials (User ID, Password, and Security Questions) that ALL authorized signers share.

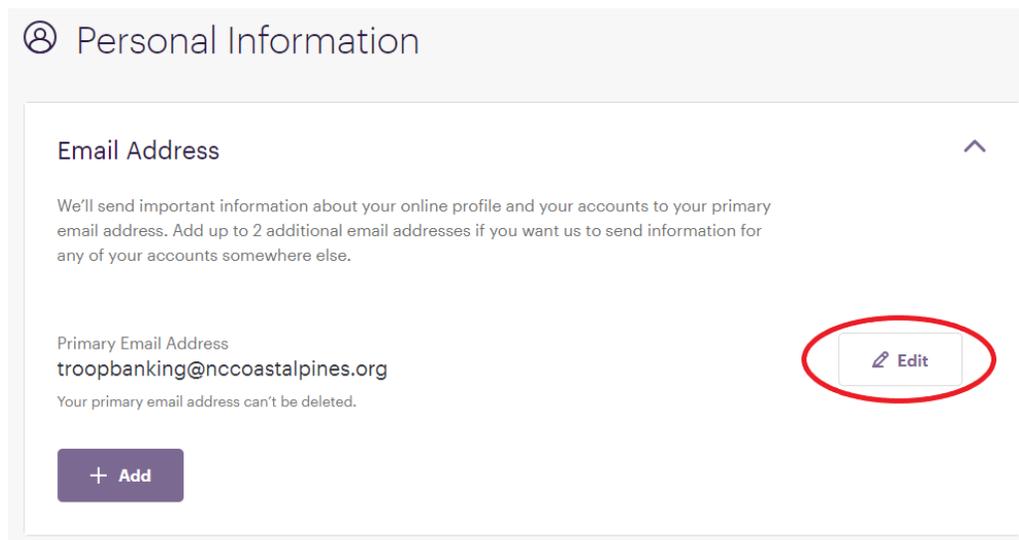
Update Email Addresses

You can update the email address(es) associated with your online account. This may be necessary when there is a change in troop leadership, for example. This is especially important if your troop has selected digital bank statement delivery, as statement notifications will be emailed to the associated email each month.

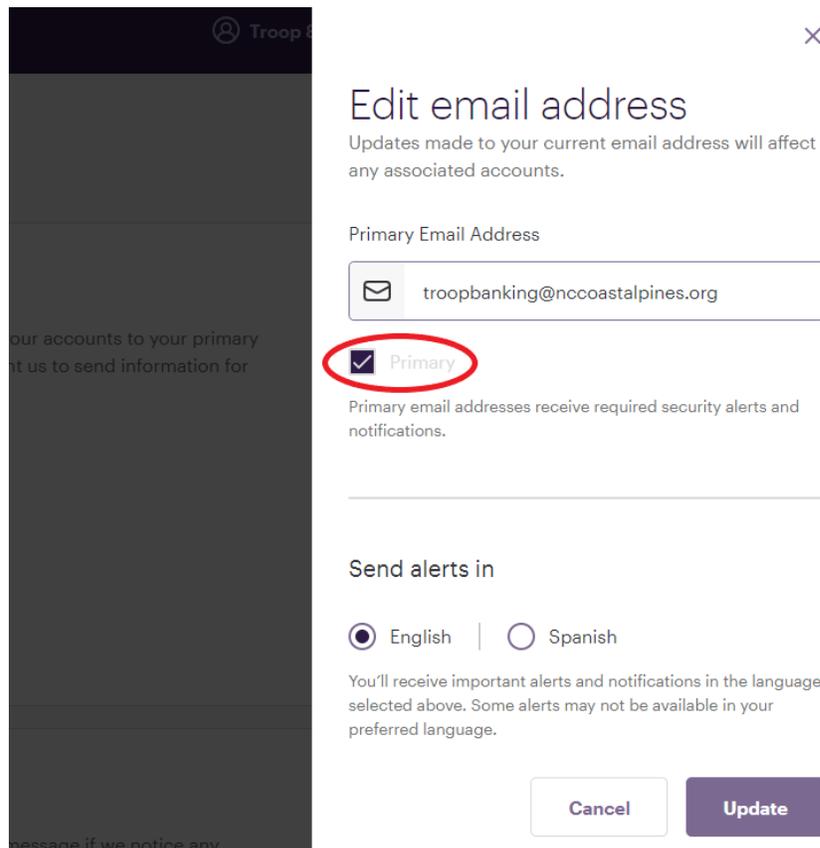
1. First, sign in to your online account (see instructions for "Sign In").
2. From your online banking Dashboard, select the person icon in the upper right-hand corner, then choose "Profile & Settings".



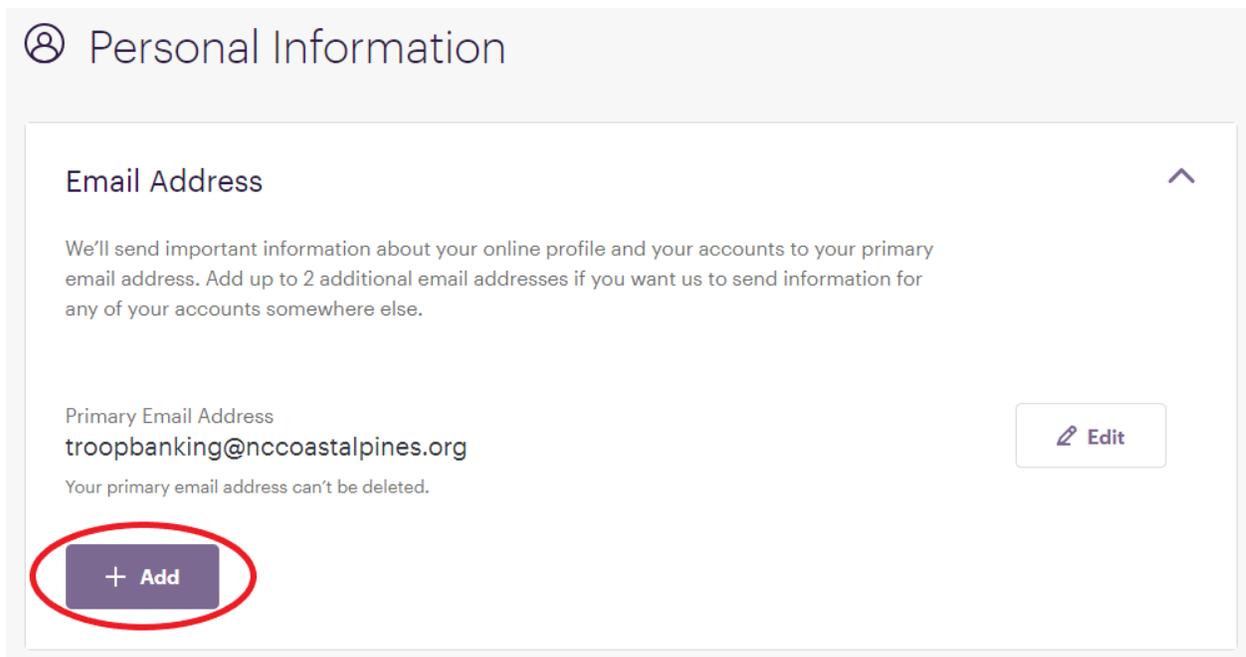
3. From the “Personal Information” screen, click the “Edit” button. This will allow you to edit the email address you currently have on file.



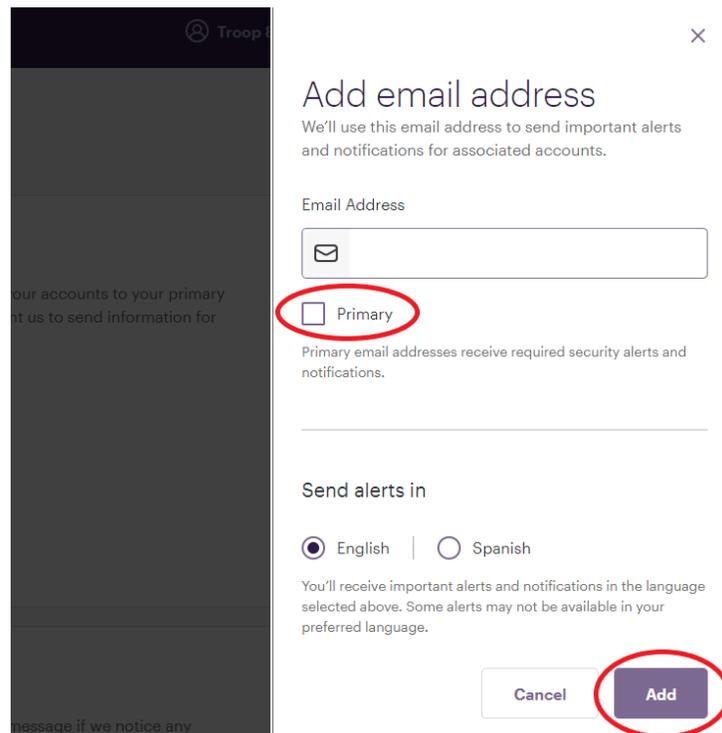
4. The box on screen prompts you to choose whether it is the “primary” email address or not. NOTE: If this is your only email address on file, it will default to being the primary one.



5. In order to add another email address, or to change your primary email address (the address where all digital correspondence will default to), click the "+Add" button.



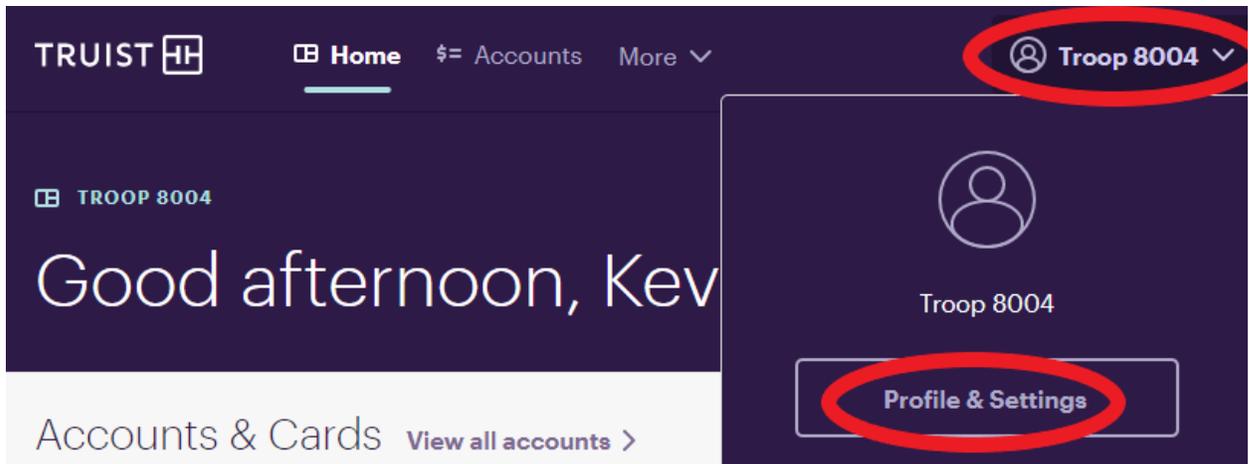
- This will allow you to add a new email address to your account. If you would like to make this email address the primary one, you can check the “Primary” box. When you are done, click “Add” to see the new address.



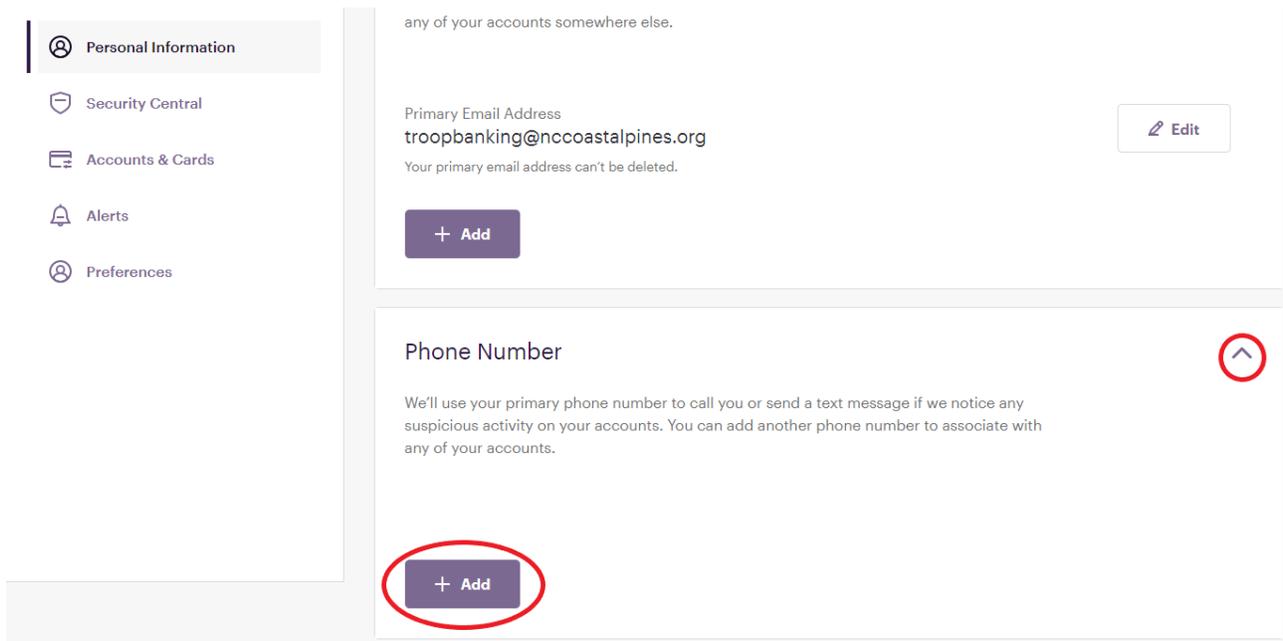
Update Phone Numbers

You can update the mobile phone number(s) associated with your online account. This may be necessary when there is a change in troop leadership, for example. This is especially important because if the bank suspects there has been fraudulent activity on your bank account, they may reach out to you by phone to confirm.

- First, sign in to your online account (see instructions for “Sign In”).
- From your online banking Dashboard, select the person icon in the upper right-hand corner, then choose “Profile & Settings”.



3. From the “Personal Information” screen, select the downward-facing arrow beside “Phone Number”. Then, from the dropdown that appears, click “Add”.

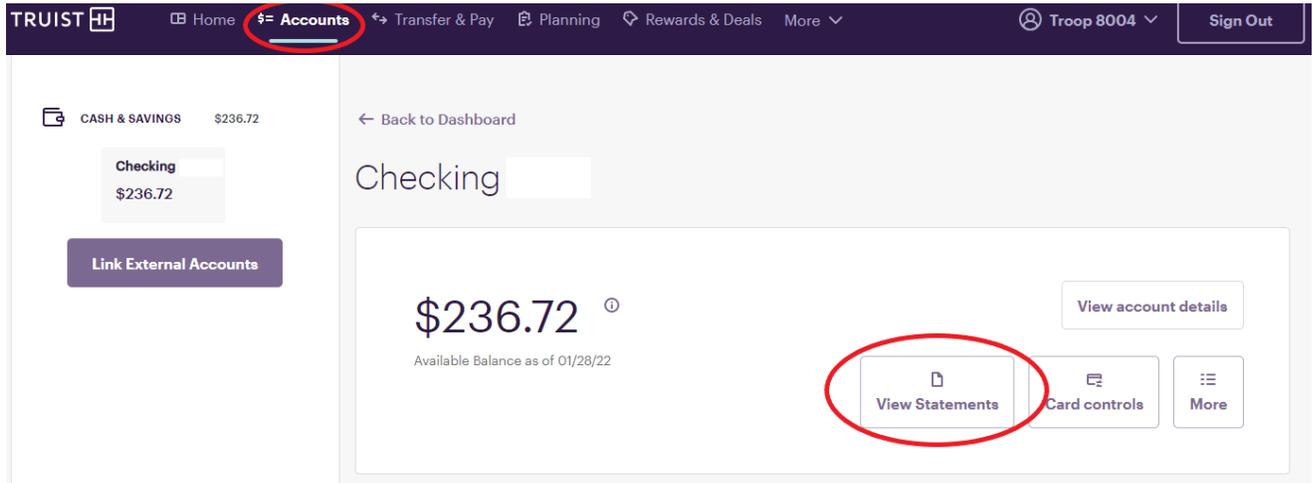


4. The “Add a phone number” sidebar will open and allow you to add or edit mobile number(s) associated with the account. When you are done, click “Add”.

Change Bank Statement Delivery Method: Online vs. Mailed

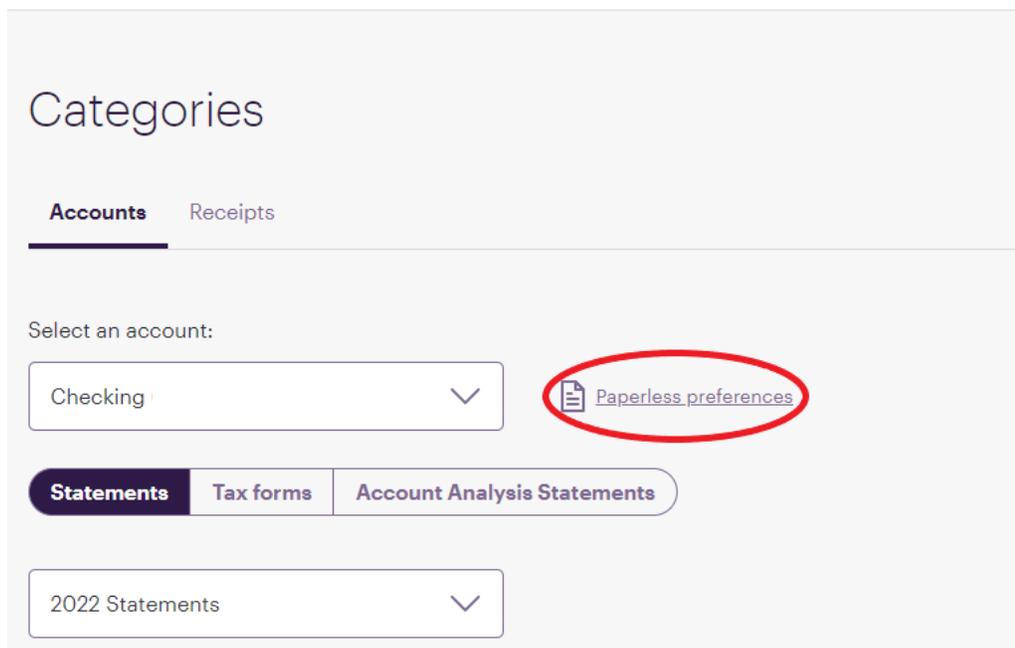
Troop bank account signers should review their bank statements each month and reconcile all activity for accuracy. Troops can elect to receive their monthly bank statements in the mail or via online delivery. This section shows how to change your statement delivery method from online delivery to mailed statements.

1. First, sign into your online account (see instructions for “Sign In”).
2. From your online banking Dashboard, select “Accounts”, then choose “View Statements”.



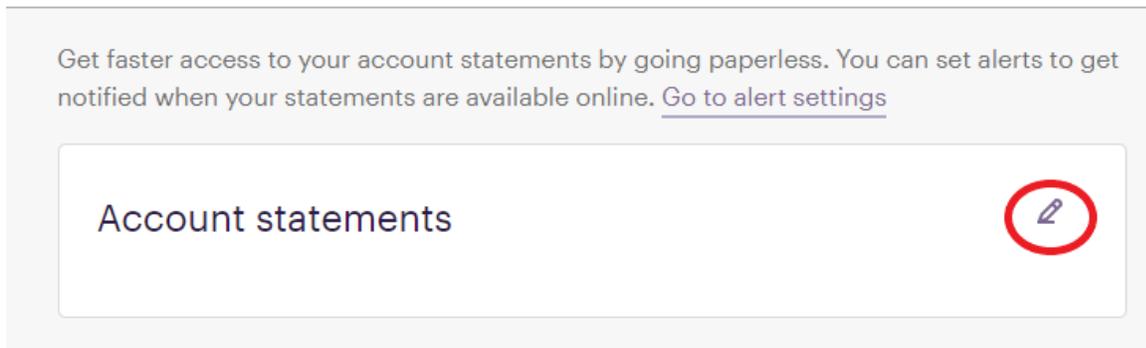
3. The Document center will open. Next, click “Paperless preferences”.

Document center



4. The Paperless preferences screen will open. Here you can click the pencil icon beside "Account statements".

Paperless preferences



5. This will open the "Manage statements" screen. Here, you can select "Paperless" or "By mail" as your option for receiving statements. You will also have to bubble the "I have read and agree to the terms and conditions" box. Click "save" to make your choice final.

Manage statements

How do you want to receive account statements?

 CASH & SAVINGS

Checking Paperless By mail

 [Truist Electronic Delivery Terms and Conditions](#)

I have read and agree to the terms and conditions.

Save Cancel

6. You'll get a confirmation message confirming the change.

Manage statements

The screenshot shows a web interface for managing statements. At the top, a green notification bar with a checkmark icon and a close button (X) displays the message: "Your preferences have been saved." Below this, the main heading asks, "How do you want to receive account statements?". Underneath, there is a section titled "CASH & SAVINGS" with a sub-section for "Checking". Two radio button options are available: "Paperless" (which is selected) and "By mail". Below the account selection, there is a link to "Truist Electronic Delivery Terms and Conditions" and a checked checkbox with the text "I have read and agree to the terms and conditions." At the bottom, there are two buttons: a purple "Save" button and a white "Cancel" button.

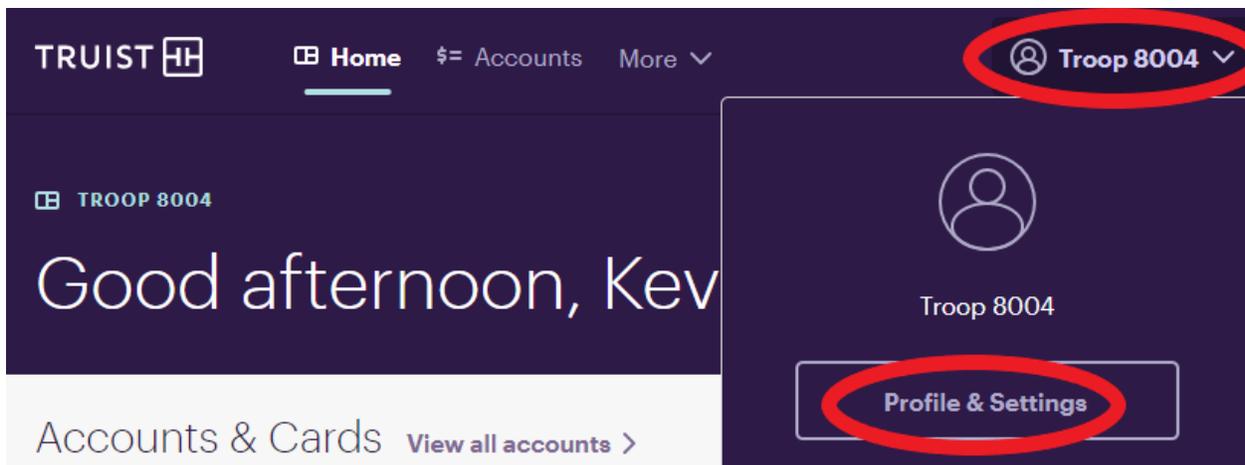
7. Finally, you'll want to confirm that the mailing address assigned to your bank account is correct. **You can confirm this by emailing troopbanking** at troopbanking@nccoastalpines.org. From there, we will reach out to Truist for you to confirm/update any mailing addresses you need.

Set-up Bank Alerts

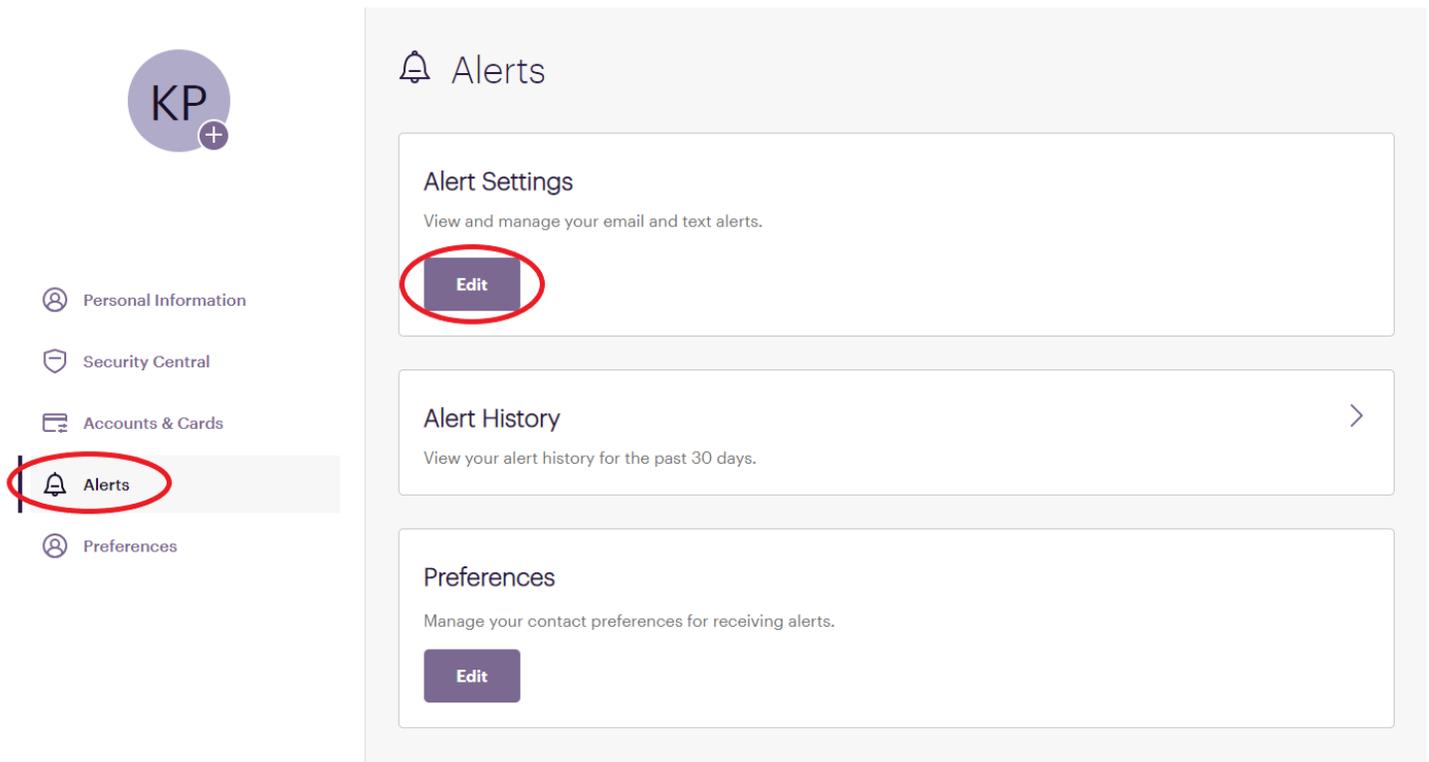
Setting up automated alerts is a hassle-free way to hear about bank account changes or potential concerns. For example, the bank can send you a text message or email if your account reaches a \$0.00 balance or is assessed an overdraft fee. These alerts can tip you off to fraudulent activity or financial miscommunications quickly, helping you avoid further issues.

NOTE: Before completing the below, follow the earlier instructions to “Update Email Addresses” and “Update Phone Numbers”. This will ensure that you have the correct email addresses/phone numbers available to select from when choosing your alert settings.

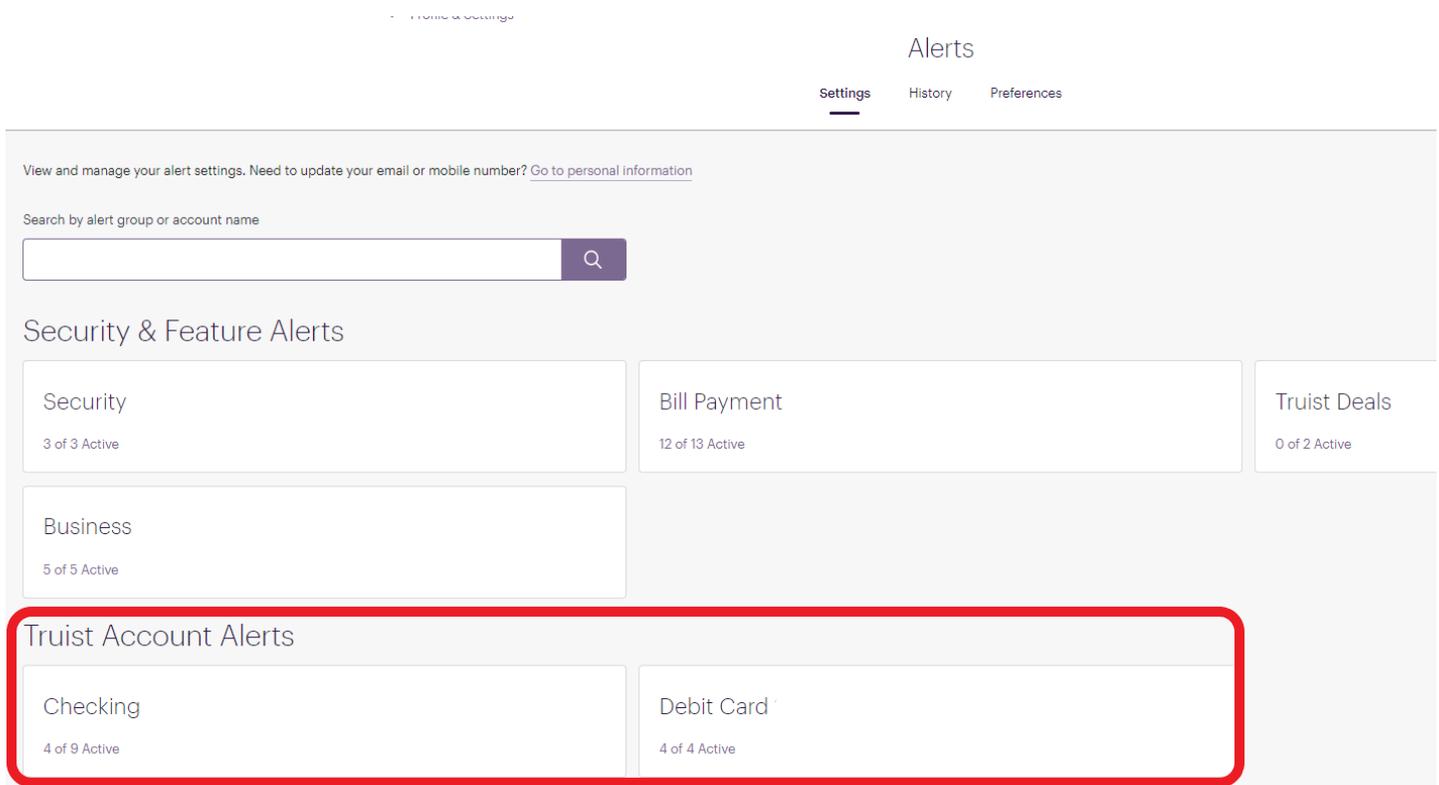
1. First, sign into your online account (see instructions for “Sign In”).
2. From your online banking Dashboard, select the person icon in the upper right-hand corner, then choose “Profile & Settings”.



3. From the “Alerts” icon on the sidebar, select “Edit” under “Alert Settings”.



4. This will display the many account alerts you can opt into. Scroll down until you see “Truist Account Alerts”. These will be the most beneficial to you and your fellow signers. Click the box on each alert to learn more about them.

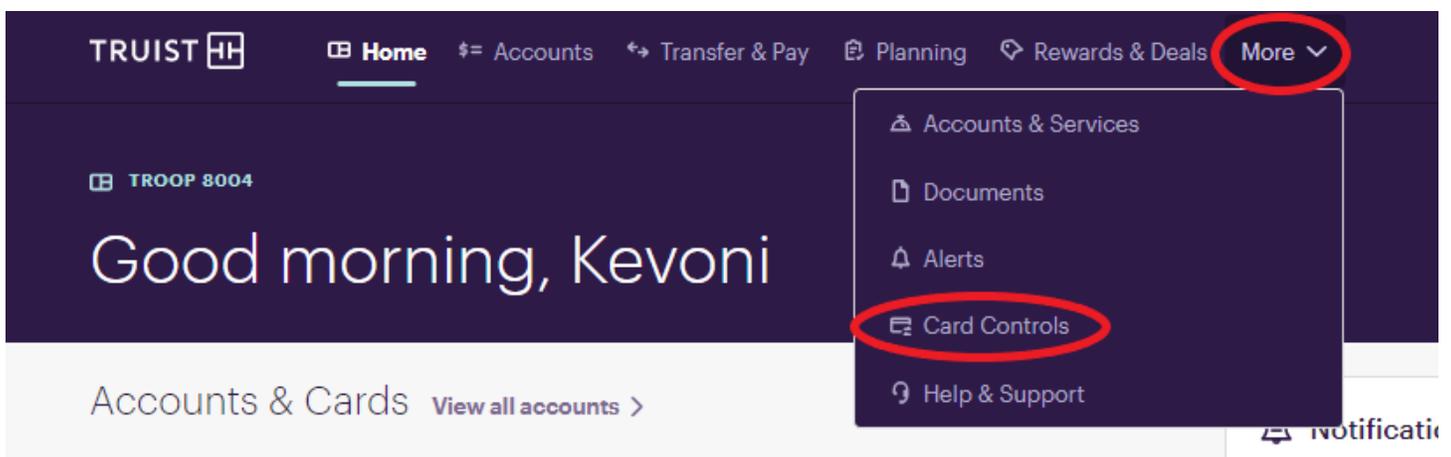


5. In particular, some of the alerts our account signers find most helpful are:
- a. **“Zero/Negative Balance Alert” under “Checking XXXX”** – Notifies you if the account gets to a \$0.00 or negative balance.
 - b. **“Overdraft Fee” under “Checking XXXX”** – Notifies you if the account is assessed an overdraft fee.
 - c. **“Check Cleared” under “Checking XXXX”** – Notifies you when a check you wrote has posted and the funds are officially removed from your account.
 - d. **“Deposit Correction” under “Checking XXXX”** – Notifies if you made a bank deposit and the total funds you deposited into the account did not match the deposit slip.
 - e. **“Online Statement” under “Checking XXXX”** – Notifies you each month when your bank statement is ready. Even if you get paper statements mailed to you, this alert is a helpful reminder that it’s time to complete the monthly bank statement review.
 - f. **“Unusual Transaction” under “Debit Card XXXX”** – Notifies you of any unusual transactions on your debit card.

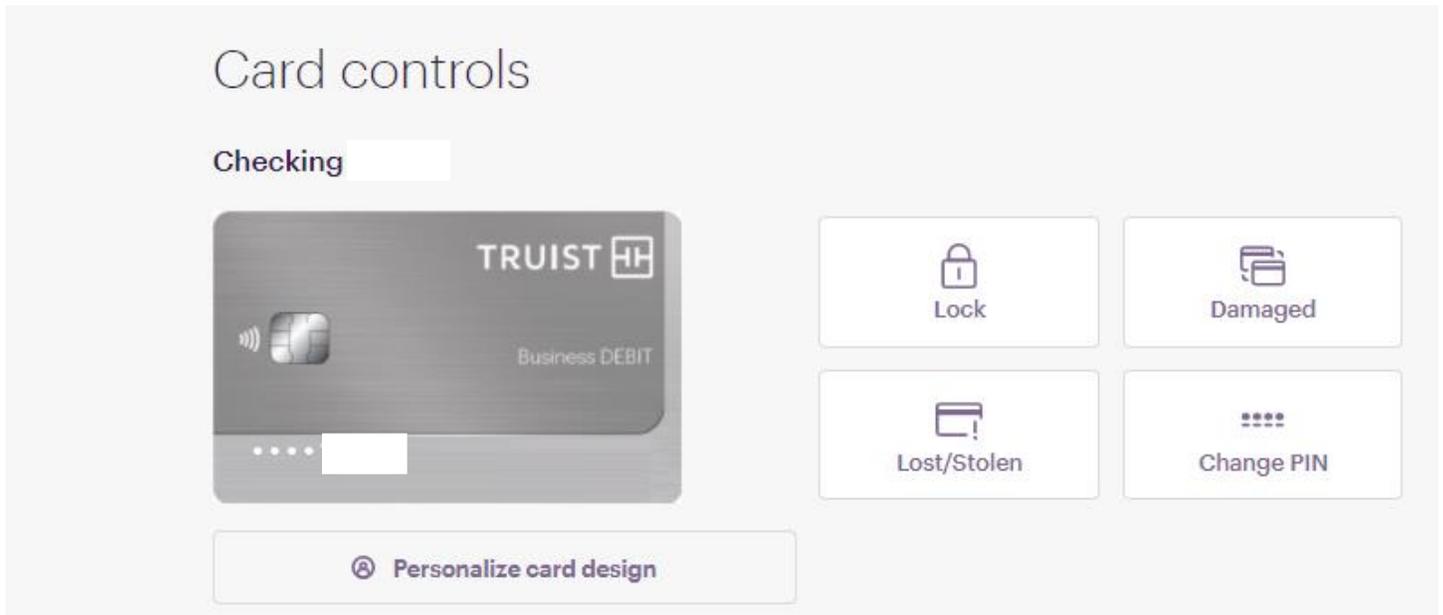
Disable a Debit Card

Some limited debit card controls are available to account signers from the online banking account. The most commonly used option is to temporarily disable a debit card if it has been lost or stolen or if the card number has been compromised and used for a fraudulent charge.

1. First, sign in to your online account (see instructions for “Sign In”).
2. From your online banking Dashboard, select “More” from the upper menu, then choose “Card Controls”.



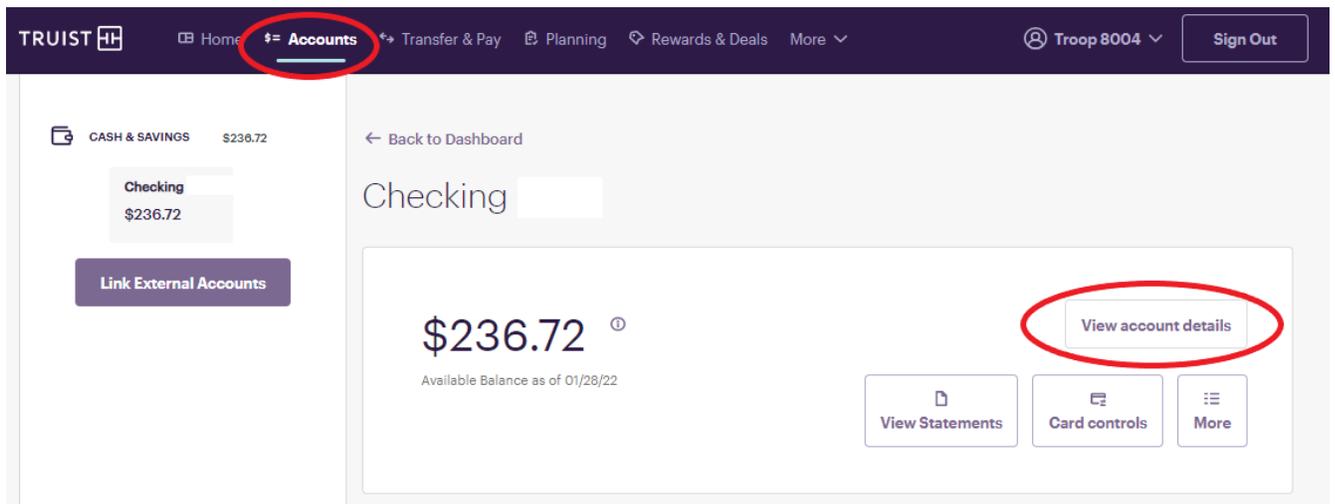
3. From the Card Controls screen, you can:
 - a. Click “Lock” to lock your card.
 - b. Select “Report Lost or Stolen” for a missing card.
 - c. “Change Pin” for a new pin number to be assigned to a card.



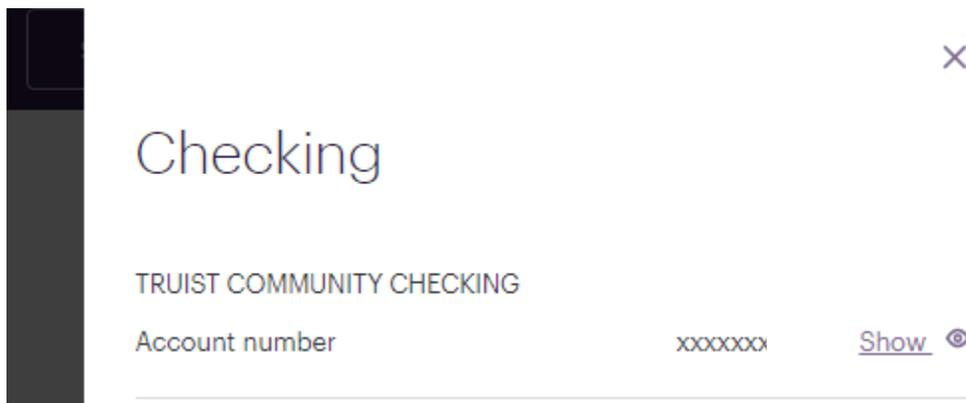
4. If you've had fraud on your account or need any other debit card assistance, please contact council at troopbanking@nccoastalpines.org or 800-284-4475.

View Account Number

1. Sometimes, you may want to make a deposit at the bank. You may do this by visiting an ATM with your debit card, or utilizing the Truist bank app. However, if you would like to make an in-person deposit at a branch, you will need your account number. Present this account number to a teller at a Truist branch and be sure to note the deposit details in your financial records.
2. To view your account number, sign in to your online account (see instructions for “Sign In”).
3. From your online banking Dashboard, select “Accounts” and then “View account details”. Alternatively, you can download your latest bank statement to view your account number.



4. Your account sidebar will open on the right. Here, you can view your Account number by clicking “Show”. Your routing number, current balance, and more will also be displayed.



Add/Remove Account Signer

To update your troop bank account’s signers, please fill out the Wufoo form here:
<https://gsncpc.wufoo.com/forms/change-signers-on-a-girl-scout-troop-bank-account>

Within 3 to 5 business days, troopbanking will reach out with next steps.

Note: this process is also required for name changes, such as when an account signer remarries or otherwise changes their name.

Additional Resources

Did this document not answer your question?

Feel free to reach out to troopbanking at: troopbanking@nccoastalpines.org

Or visit our website at: www.gsncpp.org/troop-banking to find more information, such as:

- **Volunteer Training**
- **Troop Banking Guidelines**
- **Troop Financial Tracking Worksheet**
- **Cheddar Up FAQs**
- **and more**