**Instructions**

Provide to all testers. Review appropriate areas to become familiar with the product. Select the appropriate option for each of the features. “Not Applicable” can be utilized for features or products not offered by the institution. “Notes & Comments” can be utilized for questions or additional clarification. To provide further clarification, append additional screen shots to the end of this document.

**Preparations**

Review [Virtual Trainer](https://virtualtrainer.fiservapps.com/Help/Abiliti/Content/Home.htm) Link

Note the Abiliti requirements in the Product section for Abiliti browser and Abiliti Mobile.

Obtain the following types of users where applicable:

* Existing Retail Online User
* Existing Business Online User
* Existing Retail and Business Online User
* New Retail Online User
* New Business Online User
* New Retail and Business Online User

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| **Browser Testing** | | |
| --- | --- | --- |
| **Feature** | **Pass / Fail /**  **Not Applicable** | **Notes & Comments** |
| **Link existing profile / login / logout** |  | Linked user’s registration flows from the browser to the app |
| Existing Retail Online and /or Business Online user  Click - Link existing profile | Choose an item. |  |
| Link Profile(s) using the appropriate choice (based on FI’s offering)  Personal banking - If you only have a Retail Online user  OR  Business banking - If you only have a Business Online user\*  OR  Both – If you have both a Retail Online user and a Business Online user\*  Enter EXISTING Online username and password > Continue | Choose an item. |  |
| Input your new Abiliti username, current email and new password, confirm password > Create Profile  Note: Requirements on this page have changed. Refer to virtual trainer | Choose an item. |  |
| Confirm receipt of “Verify your email address” email and verify email | Choose an item. |  |
| Log in using new username and password | Choose an item. |  |
| Enter token at login\* | Choose an item. |  |
| Confirm receipt of ‘’One Time Passcode” email | Choose an item. |  |
| Input One Time Passcode | Choose an item. |  |
| Log out | Choose an item. |  |
| **Click on Create new profile** |  |  |
| Existing Retail Online and /or Business Online user  Click - Create a new profile  Enter required information, enter a new username and password. | Choose an item. |  |
| Confirm receipt of ‘Verify your email address’ email and verify email | Choose an item. |  |
| Log in using new username and password | Choose an item. |  |
| **Log in** |  |  |
| Username | Choose an item. |  |
| Password | Choose an item. |  |
| Confirm receipt of ‘’One Time Passcode” email | Choose an item. | If already verified will not prompt |
| Input One Time Passcode | Choose an item. |  |
| **Forgot Password** |  |  |
| Forgot password - follow prompts to change password | Choose an item. |  |
| Confirm receipt of account recovery email and verify email | Choose an item. |  |
| Confirm receipt of Password Updated email | Choose an item. |  |
| Confirm successful login after changing password | Choose an item. |  |
| **Home Page** |  |  |
| Verify accounts based on profile (personal and /or business) | Choose an item. |  |
| Account nicknames | Choose an item. |  |
| Balances | Choose an item. |  |
| Quick transfer | Choose an item. |  |
| Recent transactions drop down changes when clicking between accounts | Choose an item. |  |
| Debit and/or Credit images display on recent transaction drop down, if applicable | Choose an item. |  |
| **Edit accounts** |  |  |
| Change account display order under edit | Choose an item. |  |
| Change nicknames | Choose an item. |  |
| **Accounts** | . |  |
| Transaction listings display | Choose an item. | AMS transactions (if applicable) |
| Print function on transaction page | Choose an item. |  |
| Balances on transactions page display | Choose an item. |  |
| Sort by date, description, debit, credit | Choose an item. |  |
| Debit and Credit images display when clicking on icon, if applicable | Choose an item. |  |
| Print function for images | Choose an item. |  |
| **Account info** |  |  |
| Account number ’show/hide’ masking | Choose an item. |  |
| Account Details | Choose an item. |  |
| **More Options** |  |  |
| Stop Payments: add a stop payment using options available. (based on FI’s offering) | Choose an item. |  |
| Stop Payments: Next option | Choose an item. |  |
| Positive Pay: | Choose an ite |  |
| **Payments** |  |  |
| Verify payment options display | Choose an item. |  |
| Personal Payments/ Bill Pay | Choose an item. |  |
| ACH\* | Choose an item. |  |
| Wires\* | Choose an item. |  |
| Business Payments\*/ Bill Pay | Choose an item. |  |
| **Transfers** |  | Transfers are only available:  From personal to personal  From business to business |
| “From” account displays applicable accounts | Choose an item. |  |
| “To” account displays applicable accounts | Choose an item. |  |
| Initiate a one-time transfer | Choose an item. |  |
| Transfer description | Choose an item. |  |
| Transfer details | Choose an item. |  |
| Confirm Edit and Transfer money options | Choose an item. |  |
| Initiate recurring transfer: personal and/or business  -If using Premier Addenda | Choose an item. |  |
| Scheduled transfers listing: personal and/or business | Choose an item. | Hovering over each row should highlight row. |
| Delete scheduled transfer | Choose an item. | While hovering use trash can icon |
| **Business features** |  |  |
| Wire Manager wire transfer\* | Choose an item. |  |
| ACH Manager ACH transfer\* | Choose an item. |  |
| ACH review approvals | Choose an item. |  |
| ACH token approvals | Choose an item. |  |
| ACH template approval | Choose an item. |  |
| Merchant Capture | Choose an item. |  |
| **Statements** |  |  |
| Select Account and Time Frame | Choose an item. |  |
| Statement list | Choose an item. |  |
| View/ verify statement display | Choose an item. |  |
| Print icon | Choose an item. |  |
| **Miscellaneous Items** |  |  |
| Logo and color display correctly | Choose an item. |  |
| Clicking on logo returns you to requested area | Choose an item. |  |
| Verify footer (links, images, etc.) | Choose an item. |  |
| **Username dropdown** |  |  |
| Last Login date and time | Choose an item. |  |
| Licenses | Choose an item. |  |
| Logout | Choose an item. |  |
| **Profile & Setting** |  | Based on FI’s offerings |
| Email | Choose an item. |  |
| Phone | Choose an item. |  |
| Password | Choose an item. |  |
| Account Settings | Choose an item. | Electronic documents |
| Personal Alerts | Choose an item. | Notifi product |
| Business Alerts | Choose an item. | Notifi product  Currently not available |

**Place screenshots below**

| **Mobile App (iPhone and Android)** | | |
| --- | --- | --- |
| **Feature** | **Pass / Fail /**  **Not Applicable** | **Notes & Comments** |
| New app updates screen | Choose an item. | First app access only |
| Login page with Link and Create options | Choose an item. | Second app access only |
| Username greeting with login | Choose an item. | Successful login |
| **Link existing profile / login / logout** |  | Linked user’s registration flows from the app to the browser |
| Existing Retail Online and /or Business Online user, **not already linked via the browser.**  Click - Link existing profile | Choose an item. |  |
| Link Profile(s) using the appropriate choice (based on FI’s offering)  Personal banking - If you only have a Retail Online user  OR  Business banking - If you only have a Business Online user\*  OR  Both – If you have both a Retail Online user and a Business Online user\*  Enter EXISTING Online username and password > Continue | Choose an item. |  |
| Input your new Abiliti username, current email and new password, confirm password > Create Profile  Note: Requirements on this page have changed. Refer to virtual trainer | Choose an item. |  |
| Confirm receipt of “Verify your email address” email and verify email | Choose an item. |  |
| Log in using new username and password | Choose an item. |  |
| Confirm receipt of ‘’One Time Passcode” email | Choose an item. |  |
| Input One Time Passcode | Choose an item. |  |
| Terms and Conditions | Choose an item. | Presented if not accepted in browser  If declined, app will not proceed |
| Log out | Choose an item. |  |
| **Click on Create new profile** |  |  |
| Existing Retail Online and /or Business Online user  Click - Create a new profile  Enter required information, enter a new username and password. | Choose an item. |  |
| Confirm receipt of ‘Verify your email address’ email and verify email | Choose an item. |  |
| Log in using new username and password | Choose an item. |  |
| **Log in** |  |  |
| Username | Choose an item. |  |
| Password | Choose an item. |  |
| Confirm receipt of ‘’One Time Passcode” email | Choose an item. | If already verified will not prompt |
| Input One Time Passcode | Choose an item. |  |
| Token login | Choose an item. | Currently not available |
| SecureNow login | Choose an item. | SecureNow product  Currently not available |
| Instant Balance | Choose an item. |  |
| **Trouble logging in?** |  |  |
| Reset password – follow prompts to change password | Choose an item. |  |
| Confirm successful login after changing password | Choose an item. |  |
| Forget user- confirm successful removal of user | Choose an item. |  |
| Link Existing Profile | Choose an item. |  |
| **More** |  |  |
| Settings: Fingerprint / Face ID | Choose an item. | Once selected, and user has had one successful login password is no longer needed |
| Settings: Alerts | Choose an item. |  |
| Contact us: Secure chat | Choose an item. | Currently not available |
| Contact us: Location | Choose an item. |  |
| Contact us: Call us | Choose an item. |  |
| Other | Choose an item. | FI selected links |
| Quick links | Choose an item. | Based on FI’s offerings |
| Legal: Affiliation | Choose an item. |  |
| Legal: Terms and Conditions | Choose an item. |  |
| Legal: Acknowledgements | Choose an item. |  |
| Legal: Version number | Choose an item. |  |
| **Account (both)** |  |  |
| Account list edit/ sort | Choose an item. |  |
| Mask / unmask | Choose an item. |  |
| View Balance | Choose an item. |  |
| View Transaction History | Choose an item. |  |
| Transaction Search / Memo | Choose an item. |  |
| Check Image | Choose an item. |  |
| Loan Details | Choose an item. |  |
| Wire Manager wire transfer\* | Choose an item. | Currently not available |
| ACH Manager ACH transfer\* | Choose an item. | Currently not available |
| ACH review approvals | Choose an item. | Currently not available |
| Open an account | Choose an item. | Originate product (personal only) |
| **Transfers** |  |  |
| Immediate Transfers | Choose an item. |  |
| Pending Transactions | Choose an item. |  |
| Future Dated Transfers | Choose an item. |  |
| View / Delete Future Dated Transfers | Choose an item. |  |
| External transfers | Choose an item. | TransferNow product (personal only) |
| Payments | Choose an item. | CheckFree product (personal only) |
| **Deposits** |  |  |
| Deposit a check | Choose an item. |  |
| View mobile deposit history | Choose an item. |  |
| Search deposit history | Choose an item. |  |
| Rapid View or DDRM | Choose an item. | Rapid View and DDRM products  Currently not available |
| **Cards** |  |  |
| Credit Score | Choose an item. | CardHub product |
| **Live Updates and Alerts** |  |  |
| Add / Delete Account Alerts | Choose an item. |  |
| Receive Push Notifications | Choose an item. |  |
| **Miscellaneous** |  |  |
| What’s new | Choose an item. |  |
| Multitasking | Choose an item. |  |
| Click to call | Choose an item. |  |

| **Access Manager** | | |
| --- | --- | --- |
| **Feature** | **Pass / Fail /**  **Not Applicable** | **Notes & Comments** |
| **Access Manager** |  |  |
| Review New Access Manager | Choose an item. |  |
| Verify access to XAL Reports   * Log Reports * Audit Reports | Choose an item. |  |