

# Abiliti User Acceptance Test Script

Select the appropriate option for each of the items below and choose “Not Applicable” for functionality or products not used currently by the institution. Please utilize the “Notes & Comments” section for questions or additional clarification. Append additional screen shots to the Appendix (end of this document) to provide further clarification for any concerns.

Tested Feature	Pass/Fail/Not Applicable	Notes & Comments
<b>Virtual Trainer</b>		
Review Virtual Trainer Link	Choose an item.	
<b>Link Profile/Login/Logout/New Enrollment</b>		
Click on Link existing profile for initial Link Profile	Choose an item.	
Link Profile(s) using Personal banking (Retail Online) User only OR Business banking (Business Online) User only OR Both (Retail and Business Online Users)*  * Business banking user only available with business online	Choose an item.	
Select your new Username and Password for use with Abiliti: Username minimum character requirement is 6 (can be the same as used for Retail Online or Business Online)	Choose an item.	
Confirm receipt of “Verify your email address” email	Choose an item.	
Log in using new username and password	Choose an item.	
Confirm receipt of “One Time Passcode” email	Choose an item.	
Complete login using One Time Passcode	Choose an item.	
Log out	Choose an item.	
Click forgot password link and follow prompts to change password	Choose an item.	
Confirm receipt of Account Recovery email	Choose an item.	
Confirm receipt of Password Updated email	Choose an item.	
Confirm successful login after changing password	Choose an item.	
Click on Create new profile	Choose an item.	
Create a new profile by selecting an account type, enter the required information, enter a new username and password.	Choose an item.	
Confirm receipt of ‘Verify your email address’ email	Choose an item.	
Log in using new username and password	Choose an item.	
<b>Home Page</b>		

## Abiliti User Acceptance Test Script

Verify Accounts for both Personal and Business depending on linked profiles	Choose an item.	
Verify Account Nicknames	Choose an item.	
Verify Balances	Choose an item.	
Verify ability to change and save nicknames under edit accounts	Choose an item.	
Verify quick transfer on account card menu	Choose an item.	
Verify ability to change account display order under edit accounts.	Choose an item.	
Review Recent Transactions drop down changes when clicking between accounts	Choose an item.	
If applicable, verify Debit and/or Credit images display on recent transaction drop down	Choose an item.	
<b>Accounts</b>		
Click account	Choose an item.	
Verify print function on transaction page	Choose an item.	
Verify balances on transactions page display	Choose an item.	
<ul style="list-style-type: none"> <li>• Verify transactions display</li> <li>• Verify AMS transactions (if applicable)</li> </ul>	Choose an item.	
Verify sort by date, description, debit, credit	Choose an item.	
Verify Debit and Credit images display when clicking on icon.	Choose an item.	
Verify print function for images	Choose an item.	
Click Account info option	Choose an item.	
Verify the account number 'show/hide' masking option	Choose an item.	
Verify Account Details	Choose an item.	
<b>Payments</b>		
Verify payment options display	Choose an item.	
<ul style="list-style-type: none"> <li>• Personal Payments</li> </ul>	Choose an item.	
<ul style="list-style-type: none"> <li>• ACH*</li> </ul> *Only available for business online users	Choose an item.	
<ul style="list-style-type: none"> <li>• Wires*</li> </ul> *Only available for business online users	Choose an item.	
<ul style="list-style-type: none"> <li>• Business Payments*</li> </ul>	Choose an item.	

# Abiliti User Acceptance Test Script

*Only available for business online users		
<b>Transfers</b>		
Click on Transfers button	Choose an item.	
Verify applicable accounts are available in the <b>From</b> account selection	Choose an item.	
Verify applicable accounts are available in the <b>To</b> account selection	Choose an item.	
Initiate a one-time transfer* * ONLY personal to personal and business to business available*	Choose an item.	
Add transfer description	Choose an item.	
Click continue and verify transfer details	Choose an item.	
Confirm Edit and Transfer money options	Choose an item.	
Initiate a personal and/or business recurring transfer (if bank processes using Premier Addenda)	Choose an item.	
Scroll down to review scheduled transfers	Choose an item.	
Review personal and business (as applicable) scheduled transfers lists. (Hovering over each row should highlight row.)	Choose an item.	
Delete a scheduled transfer using trashcan icon when hovering over transfer	Choose an item.	
Complete a wire transfer through Wire Manager (if applicable)	Choose an item.	
Complete an ACH transfer through ACH Manager (if applicable)	Choose an item.	
Verify Merchant Capture opens	Choose an item.	
<b>Approvals (if applicable)</b>		
Verify ACH Review	Choose an item.	
Verify ACH Templates	Choose an item.	
<b>Statements</b>		
Select Account and Time Frame	Choose an item.	
Verify Statement list displays	Choose an item.	
Click on a statement to view/ verify display	Choose an item.	
Verify Print icon	Choose an item.	
<b>Additional Items</b>		

## Abiliti User Acceptance Test Script

Confirm logo and color display	Choose an item.	
Confirm clicking logo brings up home page	Choose an item.	
Verify FDIC and EHL display in footer	Choose an item.	
<b>Options under User Name</b>		
Review Last Login date and time	Choose an item.	
Settings	Choose an item.	
<ul style="list-style-type: none"> <li>• Security <ul style="list-style-type: none"> <li>○ Change Password</li> <li>○ App access*</li> </ul> </li> </ul> <p>*Only applicable for Abiliti app users</p>	Choose an item.	
Configure Alerts (if applicable) <ul style="list-style-type: none"> <li>• Manage existing Notifi alerts</li> </ul>	Choose an item.	
Click Change to change password and follow prompts	Choose an item.	
Confirm receipt of change Password email	Choose an item.	
<b>Access Manager</b>		
Review New Access Manager	Choose an item.	
Verify access to XAL Reports <ul style="list-style-type: none"> <li>• Log Reports</li> <li>• Audit Reports</li> </ul>	Choose an item.	
Verify Abiliti User Records <b>Note:</b> Place an @ in the search bar and selecting the search icon will display a complete list of Abiliti users	Choose an item.	

**Appendix: Attach or place screenshots below**