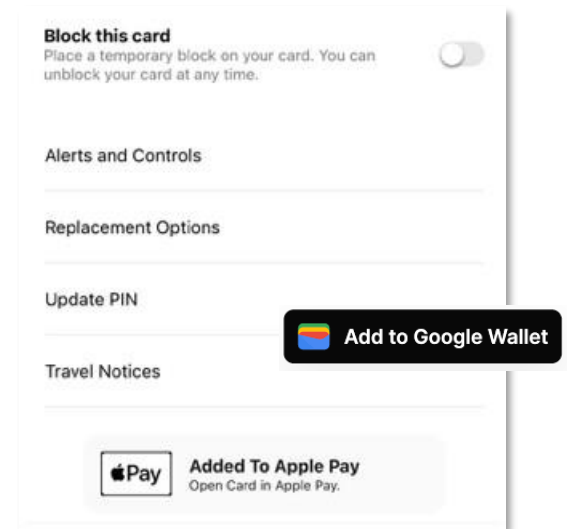# Card Management Features

INTRODUCTION

In the Montera Mobile App you have full control of your Visa Debit and Credit Cards with the Card Management Widget. As a first step, download or update the Monterra CU Mobile App at the App Store or Google Play.

This step-by-step guide will walk you through the process of accessing card management features, updating alerts, and setting notifications.

CARD MANAGEMENT FEATURES

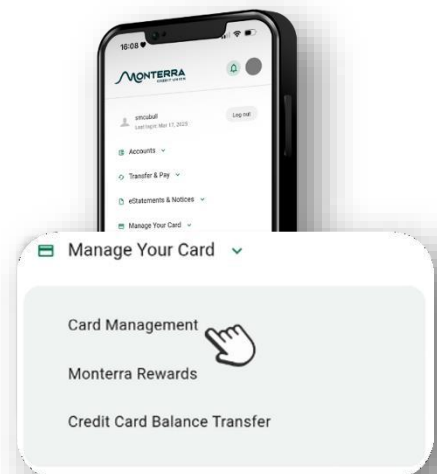Within the Card Management widget, you will be able to:

- Place a temporary block on their card
- Set alerts and controls
- Report lost/stolen cards and select replacement options
- Update pin
- Create and edit travel notices
- Add cards to Apple Pay or Google Wallet

PROCESS

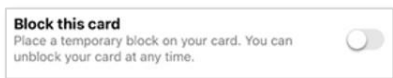To access card management features beginning on April 16th :

1. Sign on to Monterra Mobile App
2. Click More
3. Select Manage Your Card
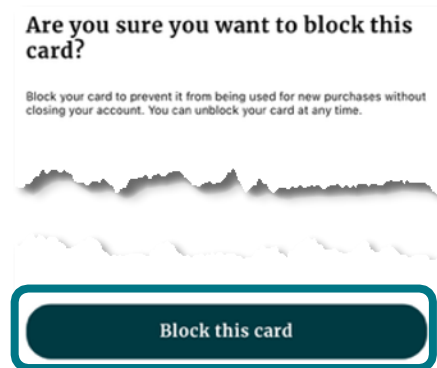4. Click on Card Management from the drop-down menu

Card Management Features
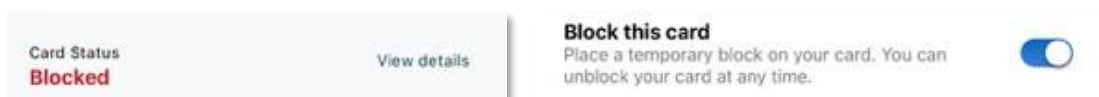
FEATURES
_____

BLOCKING A CARD

1. Within the Card Management widget, toggle the radio button to the right next **"Block this card"**

2. It will then ask if they are sure they want to block this card, click [Block this card]

3. Once clicked, their Card Card status will show **Blocked** and the radio button next to "**Block this card**"will appear in **blue**

Card Management Features
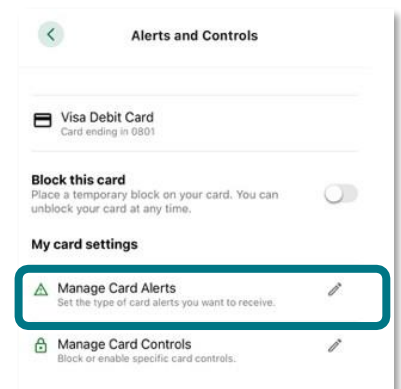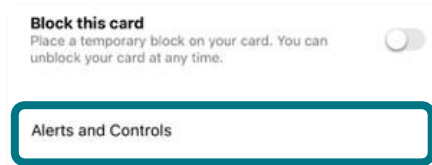
UNBLOCKING A CARD

4. Toggle the radio button to the left next to "**Block this card**." Once switched the radio button will appear in grey ⬭ as it was in the beginning.

Block this card
Place a temporary block on your card. You can unblock your card at any time.
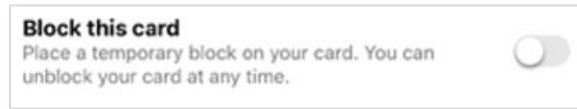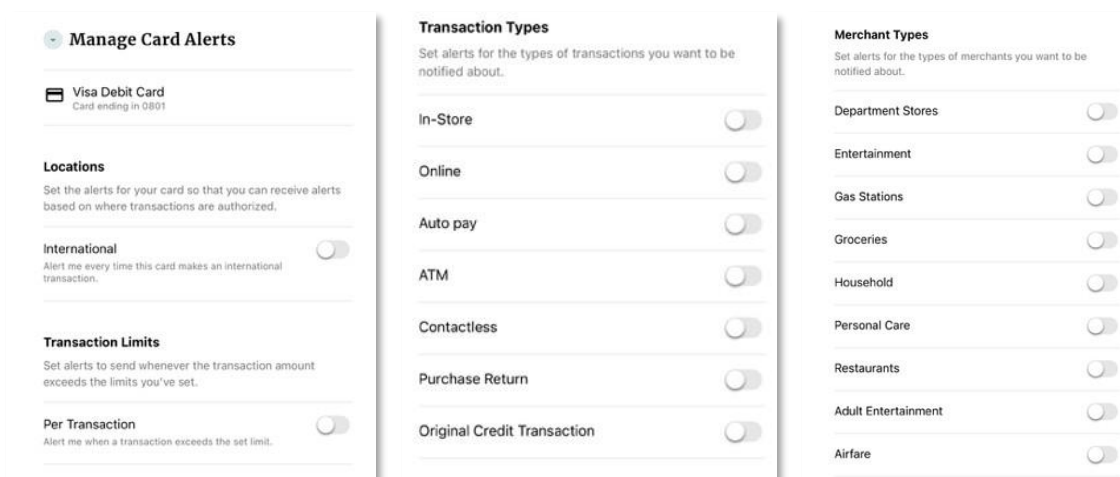
ALERTS AND CONTROLS

To create card alerts:

1. Click **Alerts and Controls**
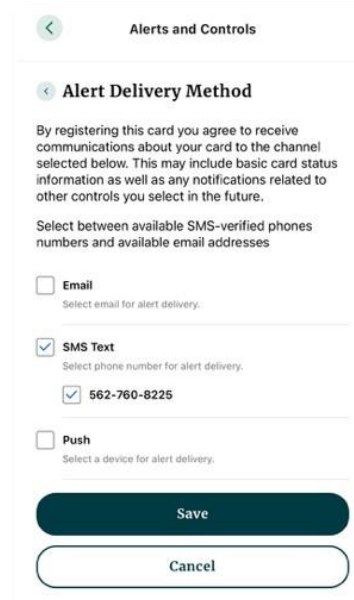2. Click Manage Card Alerts

3. Select Card Alert preferences such as locations, transaction limits and types, and Merchant Types.

Card Management Features

4. Select Alert Delivery Method preference (includes Email, SMS Text, and Push) and then click Save .
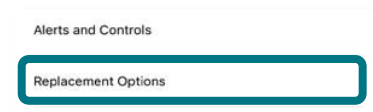
REPLACEMENT OPTIONS

To report lost or stolen cards select replacement options:

1. Click Replacement Options
2. Click the drop down list and select the applicable reason: Lost, Stolen, or Damaged
3. Once selected, click Continue to be taken to the **Next Steps**.
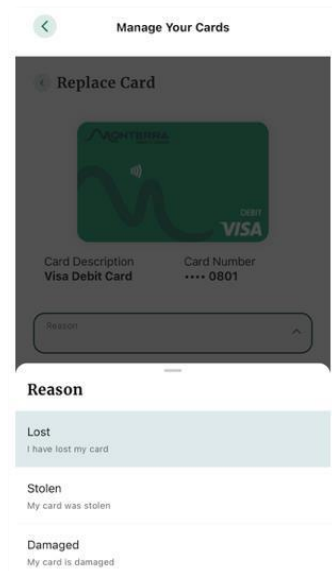
Card Management Features

4. The next steps will vary depending on the selected reason.

      a. Lost or Stolen
      b. Damaged

UPDATING A PIN

To update a PIN:

1. Click Update PIN
2. Enter New Pin
3. Confirm New Pin
4. Enter Current Pin once more
5. Click Update Pin

TRAVEL NOTICES

To create travel notices:
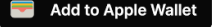
1. Click Travel Notices

Update PIN
Travel Notices

2. Enter Start Date and End Date
3. Enter Destination and Add Destination
4. Click Save.
5. Once saved, a message will appear to confirm the Travel Notice has been succesfully submitted and wil have the option to add additional travel notices.

Travel Notices

While traveling, provide us with your plans to prevent potential card interruptions

Start Date
10-17-2024

End Date
10-18-2024

Destination
Domestic

State
California

Add Destination

Cancel

Save

Travel Notices

While traveling, provide us with your plans to prevent potential card interruptions

California
Oct 17, 2024 - Oct 18, 2024

Add New Travel Notice

ⓘ Travel Notice has successfully been submitted.

PUSH PROVISIONING FOR iOS

1. Click Add to Apple Wallet
2. A message will pop up to ask to add this card to Apple Wallet, click Add to Apple Wallet

▭ Debit Card
— 0801

Add this card to Apple Wallet?

Once added, you can use this card in Apple Wallet to conveniently pay in store, in apps and online.
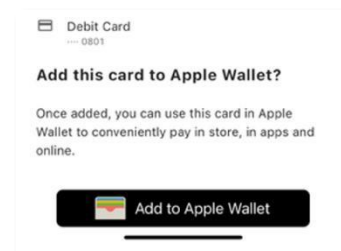
 Add to Apple Wallet

3. Once selected, verify the card information by entering the billing address and click Verify.

4. A pop up will appear to mention that they are going to connect with Apple Wallet,

Verify Your Card Information

Please verify your card by entering the following information:

Billing Address

Billing Address 2

City

State   Zip Code

Verify

6

not operated by Monterra Credit Union,
click **Yes**

You're about to connect with Apple
Wallet, not operated by Monterra
Credit Union.
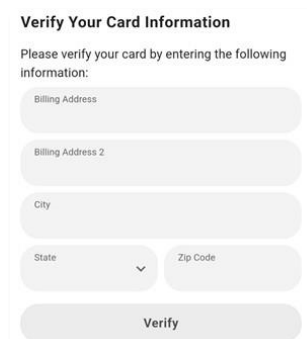
| No | Yes |
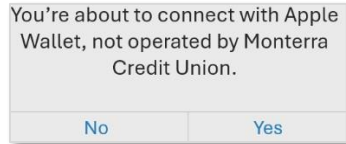
5. Select the desired device to add Apple Pay
6. Once selected, the card number will be truncated with the last 4 digits displaying only, click **Next**.

Add Card to Apple Pay
Your Card can be added to iPhone or Apple Watch.

iPhone (300)

Theresa's Apple Watch

< Back   Next

Add Card
Your Card will be available in Wallet on "iPhone."

Card Number

7. Review the Terms and Conditions and click **Agree**.
8. Once Agreed, members will have the option to Use as Default Card or **Not Now**

Set as Default Card in Wallet
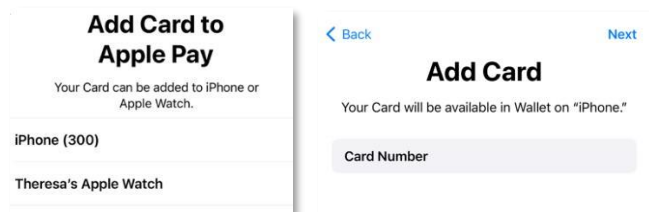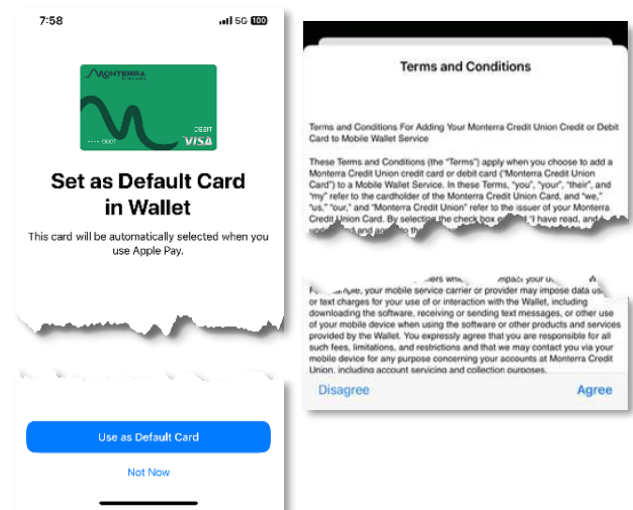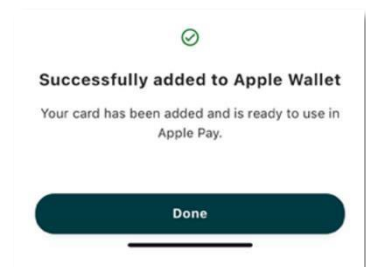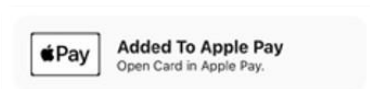This card will be automatically selected when you use Apple Pay.

Use as Default Card

Not Now

Terms and Conditions

Terms and Conditions For Adding Your Monterra Credit Union Credit or Debit Card to Mobile Wallet Service

These Terms and Conditions (the "Terms") apply when you choose to add a Monterra Credit Union credit card or debit card ("Monterra Credit Union Card") to a Mobile Wallet Service. In these Terms, "you," "your," "their", and "my" refer to the cardholder of the Monterra Credit Union Card, and "we," "us," "our," and "Monterra Credit Union" refer to the issuer of your Monterra Credit Union Card. By selecting the check box on the "I have read, and ..."

... your mobile service carrier or provider may impose data us... or text charges for your use of or interaction with the Wallet, including downloading the software, receiving or sending text messages, or other use of your mobile device when using the software or other products and services provided by the Wallet. You expressly agree that you are responsible for all such fees, limitations, and restrictions and that we may contact you via your mobile device for any purpose concerning your accounts at Monterra Credit Union, including account servicing and collection purposes.

Disagree   Agree

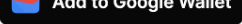9. Once a selection has been made a message will appear to confirm the card has been successfully added to the Apple Wallet.

10. Click Done and a message will appear that the card was **Added to Apple Pay**

 Pay   **Added To Apple Pay**
Open Card in Apple Pay.

⊘

Successfully added to Apple Wallet
Your card has been added and is ready to use in Apple Pay.

Done

Card Management Features

PUSH PROVISIONING FOR ANDROID

1. Click

2. Once selected, click Continue when asked to add this card to Google Pay.
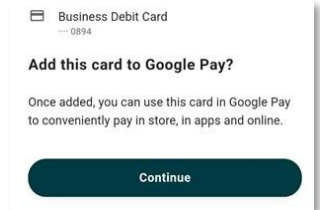
3. Verify the card information by entering the billing address and click Verify.

4. A pop up will appear to mention that they are going to connect with Google Pay, not operated by Monterra Credit Union, click **Continue**
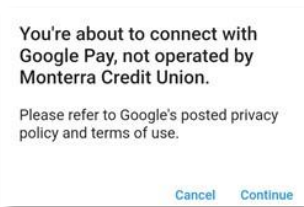
5. Click Add to Wallet and review the Issuer terms, then click Accept.
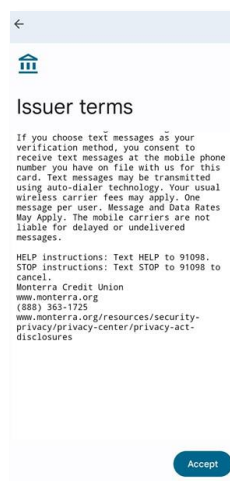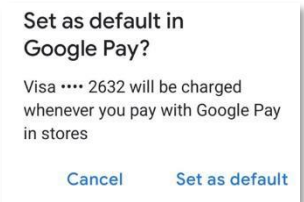
6. After the Terms have been accepted, click View in Wallet and the card will now be available for use in Google Wallet.

a. Once the Card Management widget has been closed a pop will appear to ask to Set as default or Cancel

b. After a selection has been made it will show the card has been sucessfully added to Google pay and now they can view the card in Google Wallet.