

## Quick Reference Guide for Members

### Finding Usernames

#### **Option 1:**

- Click **My Foam Lake** > Profile Details
- Username will be shown below the member's name in the Username field

#### **Option 2:**

- Click **My Foam Lake** > Password
- Username will be shown in the Client Details box

### Finding Usernames - Additional Methods for Businesses

#### **Option 1:**

- Click **Business Services** > **Pending Transactions** > **Details**
  - o Signer/Delegate must have initiated or cancelled a transaction

#### **Option 2:**

- Click **Business Services** > **My Transactions** > **Details**
  - o Signer/Delegate must have initiated or cancelled a transaction

#### **Option 3:**

- Click **Business Services** > **Profile Consolidation** > **Manage Profiles**
  - o Only for those who have consolidated profiles
  - o Can view the usernames for the linked profiles only

### Resetting a Password

#### **Option 1: When you know the password, but want to change it**

- Click **My Foam Lake** > **Password**
- Enter your current password > new password > re-enter new password > **Continue**
- Confirm password details > **Continue**
- Enter **OTP (One Time Passcode)** > **Continue**

#### **Option 2: When you have forgotten your password**

- From the login page > **Forgot username or password?** > **Reset Password**
- Enter **Username** > Choose a method for identification (email/mobile) > enter your email or phone # > **Continue**
- Enter **OTP (One Time Passcode)**
- Enter new **password** > **re-enter password** to confirm

## Quick Reference Guide For Members...

### Small Business Profile Consolidation

- Log into your small business digital banking
- Click **Business Services > Profile Consolidation**
- Click **Add Profile**
- Enter your personal or other small business **username** and **password**
- Review and confirm the profile details > click **Continue**
- To view the consolidated profile, log out and then log back in

**TIP:** To switch profiles once you are logged in, use the dropdown located at the top of the page under your displayed profile name, select the profile you would like to switch to.

### Small Business – Adding a Delegate

A delegate is someone other than a signer that you grant access to. You can choose if you want the delegate to have Read-Only access to simply view your accounts or Initiator access if they have permission to initiate a transaction – this will require a Signer to approve the transaction before it is completed.

- Log into your small business digital banking
- Click **Business Services > Delegate Management**
- Click **Add Delegate**
- Create and enter a **Delegate Username**
- Enter the name of the delegate being added
- **Check** either **Read-Only** or **Initiator** to set the access level
- **Check** either e-mail or mobile number to send password
- Enter the delegate's email address or phone number as per your previous selection
- Re-enter the delegate's email address or phone number to confirm
- Add delegate notes (if desired)
- **Check** the disclaimer confirming you have received consent from the delegate
- Click **Continue**
- Review and confirm the delegate details > click **continue**
- Enter the authentication code you received
- Click **Continue**

**TIP:** The signer will need to let the Delegate know the username you assigned them. The delegate will receive a temporary password via email or text (as you selected).