

Welcome to Edge Credential Manager!

We are excited to announce our new credential manager feature in Edge Web. Now, instead of sending your credentials via email, or having to fill out a form, you will be able to share credentials directly in Edge Action Center. This is a step by step guide showing how and when you'll use this new feature.

Introducing Edge Credential Manager

Why Credentials in Edge?

- **More Secure:** Updating your credentials in Edge allows for your updates to be saved directly in our system. Creating a tool to update these directly in Edge provides more security for your credentials, as opposed to using a third-party link or sending an email with this critical information
- **High Priority Status:** Credentials are shown as high priority items in Action Center, so you know right away what is an urgent item for your financials. Missing credentials have a large impact on Ceterus services including financial closing and accuracy, sales tax filings, 1099 amount figures, and/or tax preparations.
- **Visibility Into Credentials On File:** When you access the tool, the credentials we currently have will appear encrypted in the Credential Manager. By un hiding them, you can see the exact credential we had on file when the error occurred. See **Edge Credential Manager: Step-by-Step** to understand how!

Edge Credential Manager: Step-by-Step

- **Edge Credential Manager** allows you to:
 - Update username, password, and MFA fields directly in Edge
 - Enhance the security of your credentials
 - Manage your own credentials without third-party links or toolbars

Below, we walk you through each step of the credential setup process. If you have additional questions, please reach out to support@ceterus.com

Getting Started

Hello Jimmy John's!

We need some information from you about your **Wells Fargo** credentials so we can connect to your financial institutions and other automated services.

Don't worry, we encrypt your information to keep it secure.

Please follow the prompts to submit your credentials.

Cancel

Agree and Continue

- Log into [Edge Web](#)
- On the left sidebar, choose [Action Center > Action Items](#)
- If a credential needs to be reviewed, you'll see: [New Credential Request for \[BANK/ACCOUNT\]](#) with a purple lock icon next to it. Click the [Setup](#) button on the right side



New credential request for Wells Fargo 

Setup

- A popup should appear. Choose [Agree and Continue](#)

Step 1: Login > Please Enter Your Credentials

Please enter your credentials

Login credentials are case-sensitive. Be sure to correctly capitalize your username and password. Please test the credentials before submitting to verify the information submitted is correct.



Go Back

Continue

- On this page, you will see the URL, previous username (hidden) and previous password (hidden) populate.

- To view the previous username or password, click on the **blue eye icon** on the right of the Username or Password box. This should show the full username or password we currently have on file.
- To make changes, simply delete what was there before and enter the new information. **Be sure to correctly capitalize your username and password - login credentials are case-sensitive and will continue to give an error if not entered exactly as you would when logging in**
- Click **Continue**

Step 2: Login > Who Do These Credentials Belong To?

Who do these credentials belong to?

Some banks allow the creation of third-party login credentials with limited access. If you have not specifically setup this type of login access, you are using your personal login credentials.

- These are my personal login credentials
 These are third-party credentials
 I'm not sure

Go Back

Continue

- This page is designed to help us understand who can update these credentials moving forward.
- Choose if these credentials are credentials you will continue to update (**personal login credentials**) or if they are login credentials Ceterus can change in the future (**third-party credentials**). If you are unsure, click **I'm not sure**
- Click **Continue**

Step 3: Login > Does This Login Require Additional Fields?

Does this login require additional fields?

Additional login fields are any other fields required on the login screen, such as a company or organization ID.

- Yes
 No

 Add

Field Name

Field Value



Remove

Go Back

Continue

- On this page, confirm if there are any other fields we may need to login to your account, such as a *PIN number*, *Company ID* or *Organization ID*. **This is not the same as security questions, which will be handled separately if needed**
 - If you have any of these additional fields, choose **Yes**
 - Click **+ Add**
 - Type the Field Name in **Field Name** (for example, **Company ID**)
 - Type the Field Value in **Field Value** (for example, **Ceterus123**) - remember this will be encrypted as you type. If you want to see the full value, click on the blue eye icon at the end of the Field Value box. **Be sure to input this exactly as Ceterus would need to input to login (case-sensitive)**
 - If you need to remove a field, choose **Remove**
 - Continue to add fields as needed by repeating the above steps
 - If your credential does not require additional fields, choose **No**
- Click **Continue**

Step 4: Security Questions > Does This Login Require Any Security Questions?

Does this login require any security questions?

Yes
 No

- This page is specific to security questions needed to log into your account.
 - If your account has security questions set up, choose **Yes**
 - If we already have security questions on file, a list of those will appear in the fields (for example, *What is the name of your first pet?*)
 - In the box next to the security question, the previous answer will be encrypted. To view, click on the **blue eye icon**. To update, simply delete what was there before and input the correct answer. **Remember that answers are case-sensitive, so please input exactly as you would type this to log into the account**
 - If a security question needs added, choose **+Add** and input the correct details
 - If a security question needs removed, choose **Remove** next to that security question
 - If your account does not have security questions associated with it, choose **No**
- Click **Continue**

Completion

Thanks Jimmy John's!

We have everything we need from you at this time, but if we have any questions or need additional information, we will reach out to you!

If you have any questions, please click the "Have A Question?" button at the top of the screen and we'll assist you as soon as we can!

Close

- A confirmation page will populate when we have received all required information. Click **Close** to close out the popup. This will subsequently remove the item from your Action Items list

More Information Needed

More Information Needed

It looks like the information you submitted is the same information we already have on file. Please be sure to update any fields that are not correct.

If you aren't able to provide the necessary information at this time, you can come back later and complete the credential information. The action item will remain available until you are able to do so.

Cancel

Try Again

- If information has not been fully updated, a **More Information Needed** page will appear
- Click **Try Again** to restart and input the correct details. This typically only occurs if no changes have been made throughout the process

FAQs

What if I need to update my credentials before Ceterus realizes these need updated?

From time to time, you might wish to update your credentials prior to Ceterus reaching out - perhaps your bank requests an update, you decide to change your password on your own, etc. If this is the case, we ask that you please email support@ceterus.com letting us know that you have updated your credentials. Our team can manually update this for you, via phone call from a member of our Customer Success team.

Should you have any additional questions or would like to schedule a call, please submit a request to support@ceterus.com.