ProfitStars®

Browser Settings

Updated 4/30/2014 - SSF

Contents

ProfitStars®

How to Locate the Online Banking URL

1. Once you have pulled up the subscribers account, go to **Manage,** and then **Institutions**.

2. Enter the **institution** number and click **Search**.

3. Click **Details** to view additional information for the institution.

4. Locate the URL from the *Institution* tab and then enter the URL into a browser as it is listed in BPS.

5. Click on the corresponding online banking platform for the type of billpay product they have in our system. If the bank does not have more than one listed, use the one that is listed on the website.
   1. The below screen shot is an example for one FI, the location, and the look/wording could be different depending on the institution.
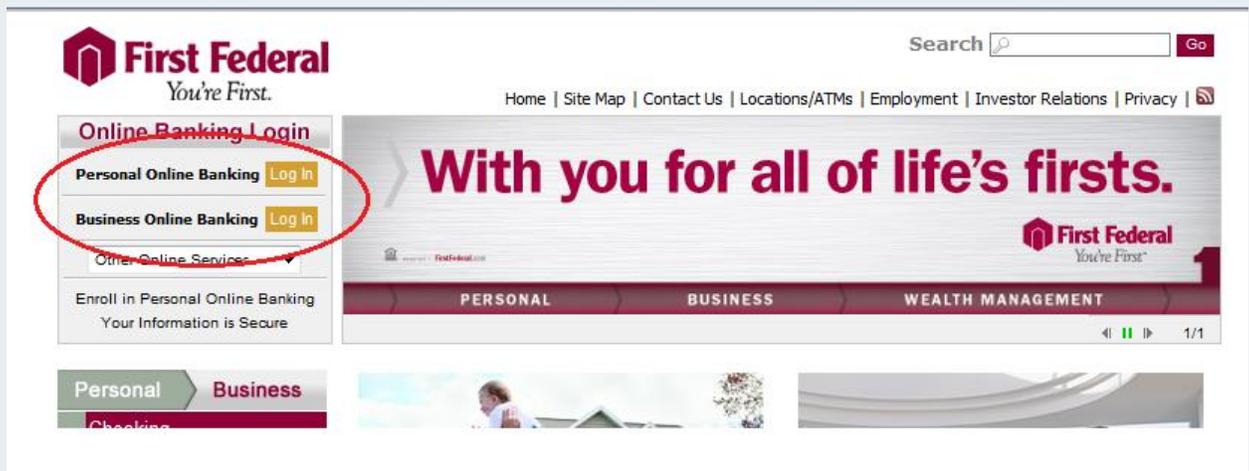
   2. If you have an FI that has a the ability to login from the banks home page it will look similar to below:
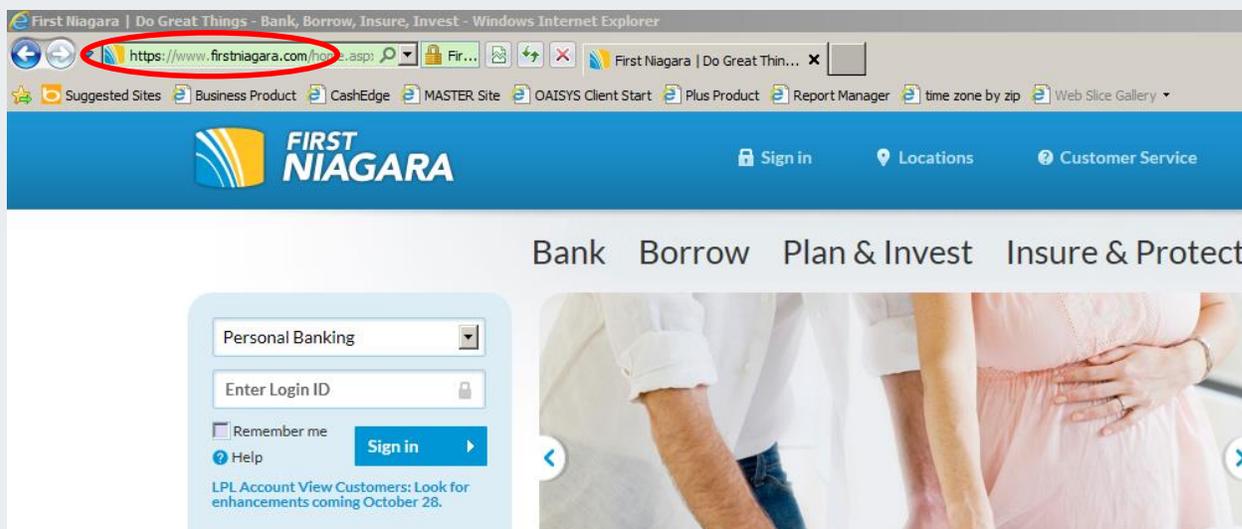
i. Enter a login ID (I normally enter 1111 as a generic ID). Some FIs have both the Login ID and Password that need to be filled in. You can use the same generic number of 1111 for both.

6. You will notice the URL will change. Have the subscriber enter the beginning of the URL that they are directed to into the **pop-up blocker and allowed sites for cookie settings.**
    1. For the first example above, you would only have them enter https://secure10.onlineaccess1.com and nothing more.

2. For the second example above, you would only have them enter https://online1.openbank.com and nothing more.
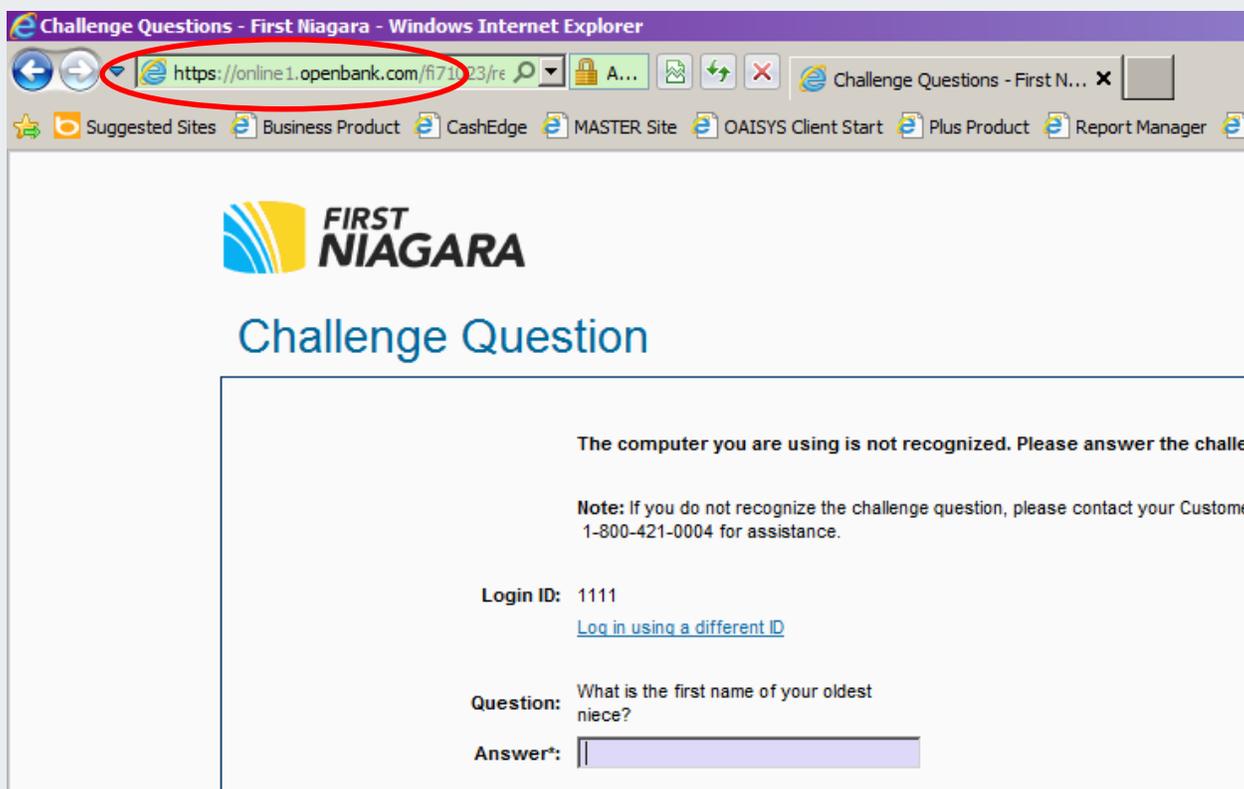
Initial Steps for Browser Settings

Enter both the **online banking URL** that you have located in the above steps and either www.billpaysite.com or www.businessbillpay-e.com to the areas in the following steps:

Select the correct browser below:

1. Internet Explorer
2. Firefox
3. Chrome
4. Safari 6.0.5

ProfitStars®

Internet Explorer

If the subscriber is using Internet Explorer 10 or 11 follow **ALL** of the below steps. If they are using an earlier version skip to step **five**.

1. Select **ALT+T**.
2. On the *Tools* menu, select **Compatibility View Settings**.
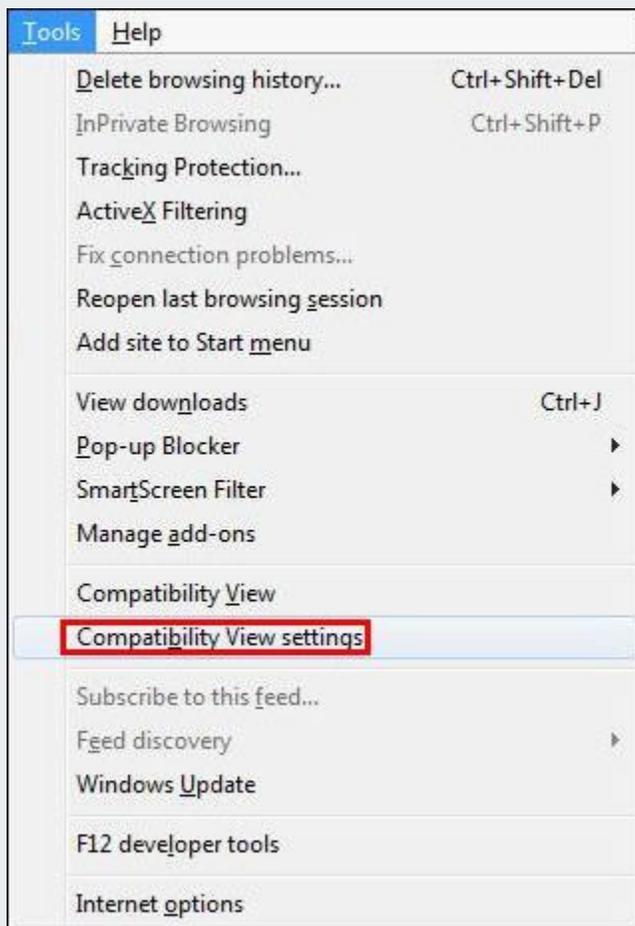
3. In the "*Add this website"* field, select ***Add*** and verify the website(s) appears in the "*Websites You've Added to Compatibility View"* box.
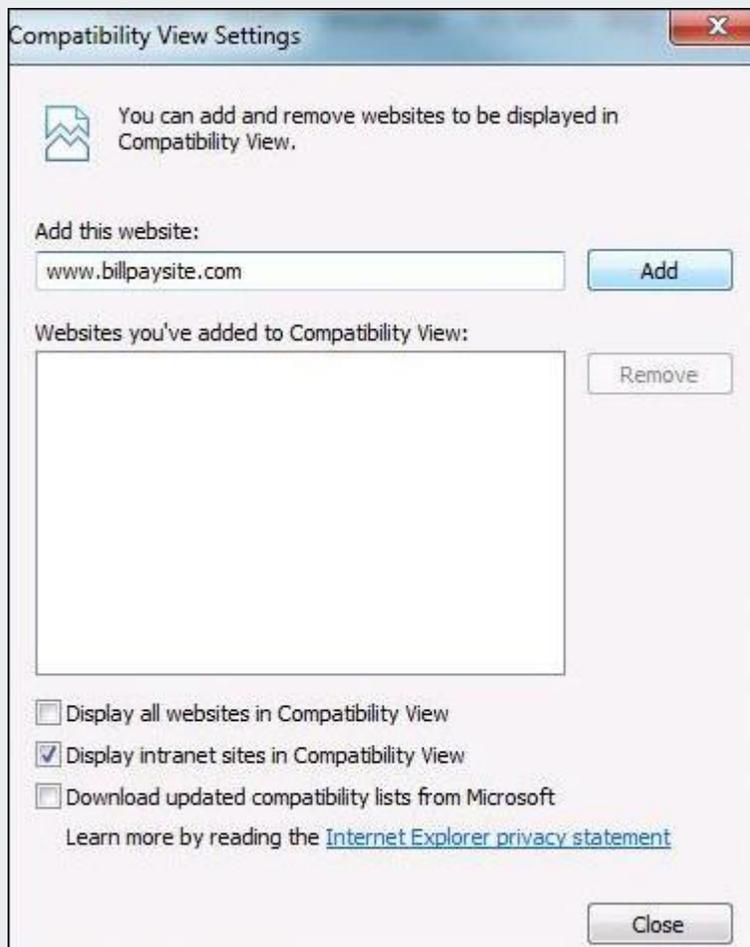
4. Select **Close.**
5. *On your browser toolbar, select* **Tools** > **Internet Options.**
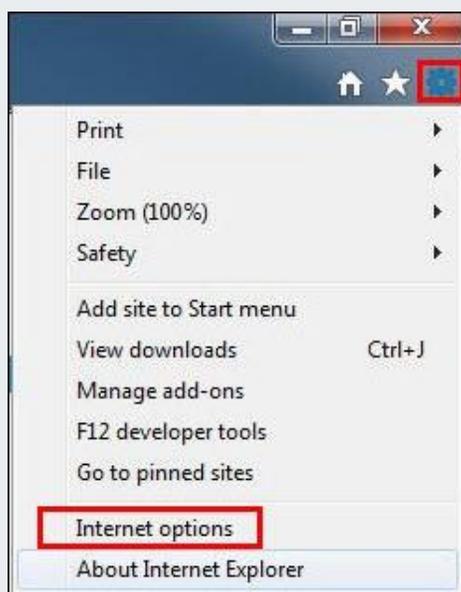
6. Go to the *Privacy* tab and click on **Sites**, add the website addresses and click **Allow**. Once they are both added click **Ok**.

ProfitStars
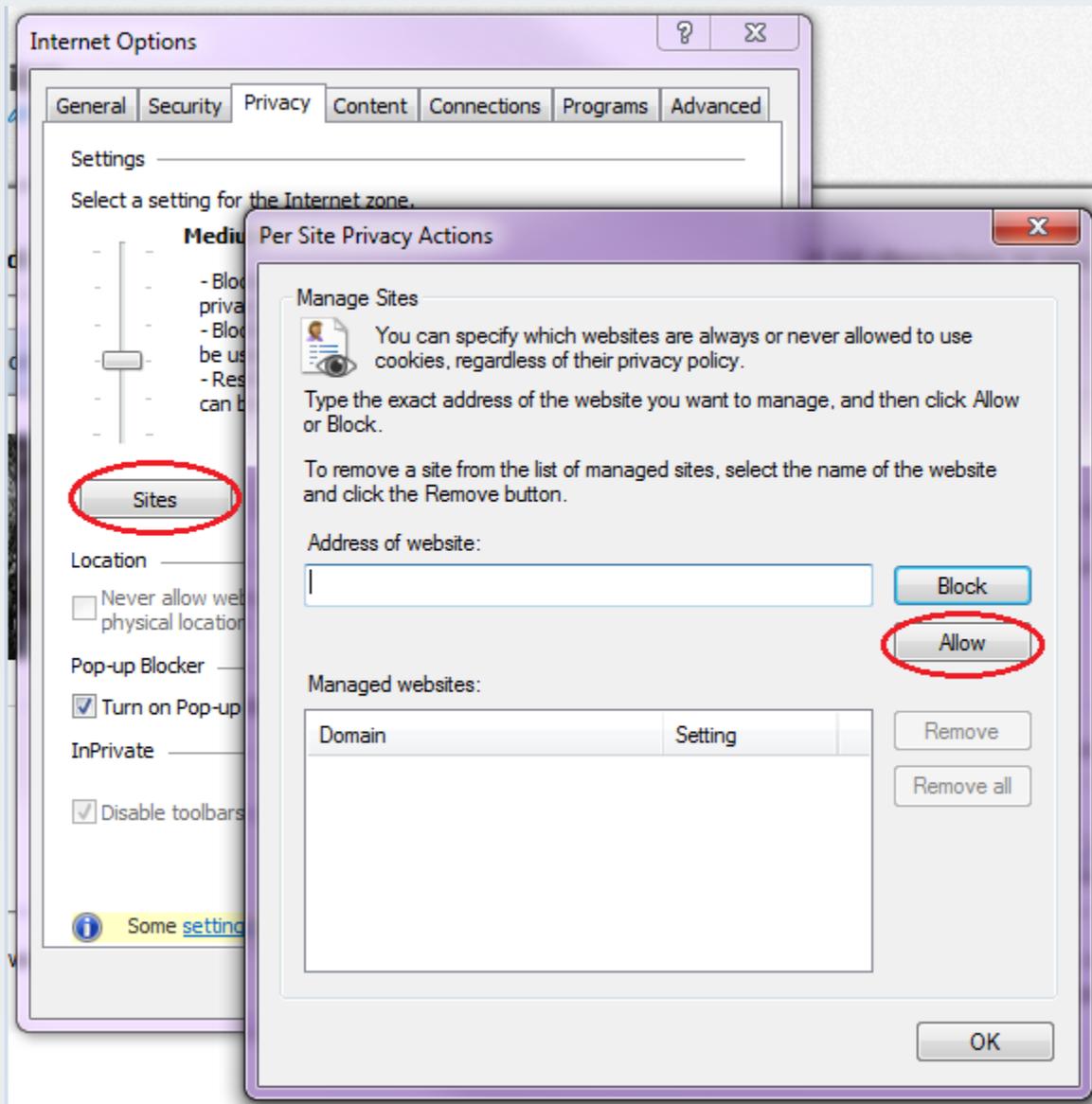
7. Click on **Settings** in the *Pop-up Blocke*r area, and add the website addresses to the "*Allowed sites.*"   Once they are both added, click **Close**.
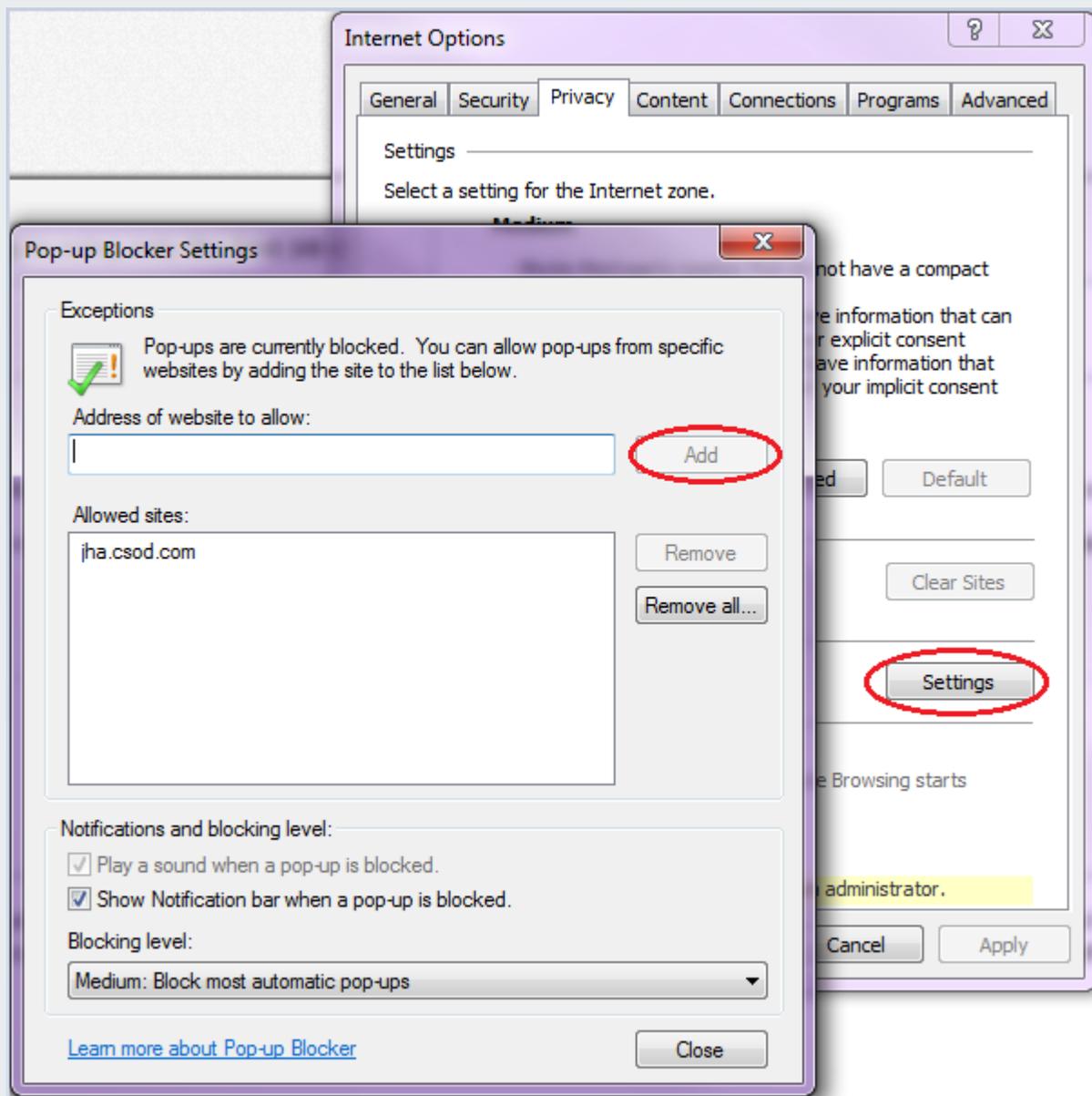
8. From the ***Privacy*** tab, click **Apply** > **Close** and then restart the browser and try again.
    - If the above settings do not fix the issue, go through the rest of the browser settings with the subscriber.
    - For **Windows Vista** the subscriber would need to restart the computer.

Note: If the above steps did not resolve the issue, select Additional Steps.

Back to Initial Steps Or Bank to Banking URL

Firefox

1) On your toolbar, select **Tools** > **Options,** OR select **Firefox** > **Options** > **Options.** Mac users, select **Firefox > Preferences.** **For Firefox 29 and up, go to section 1a below.**
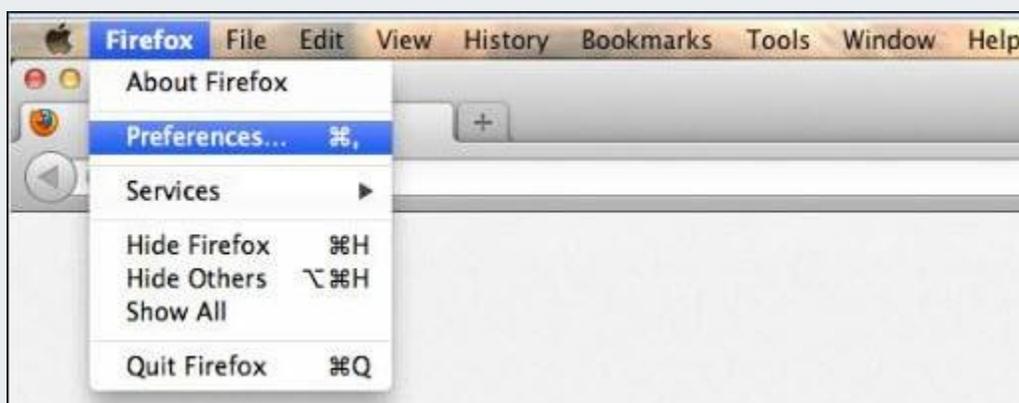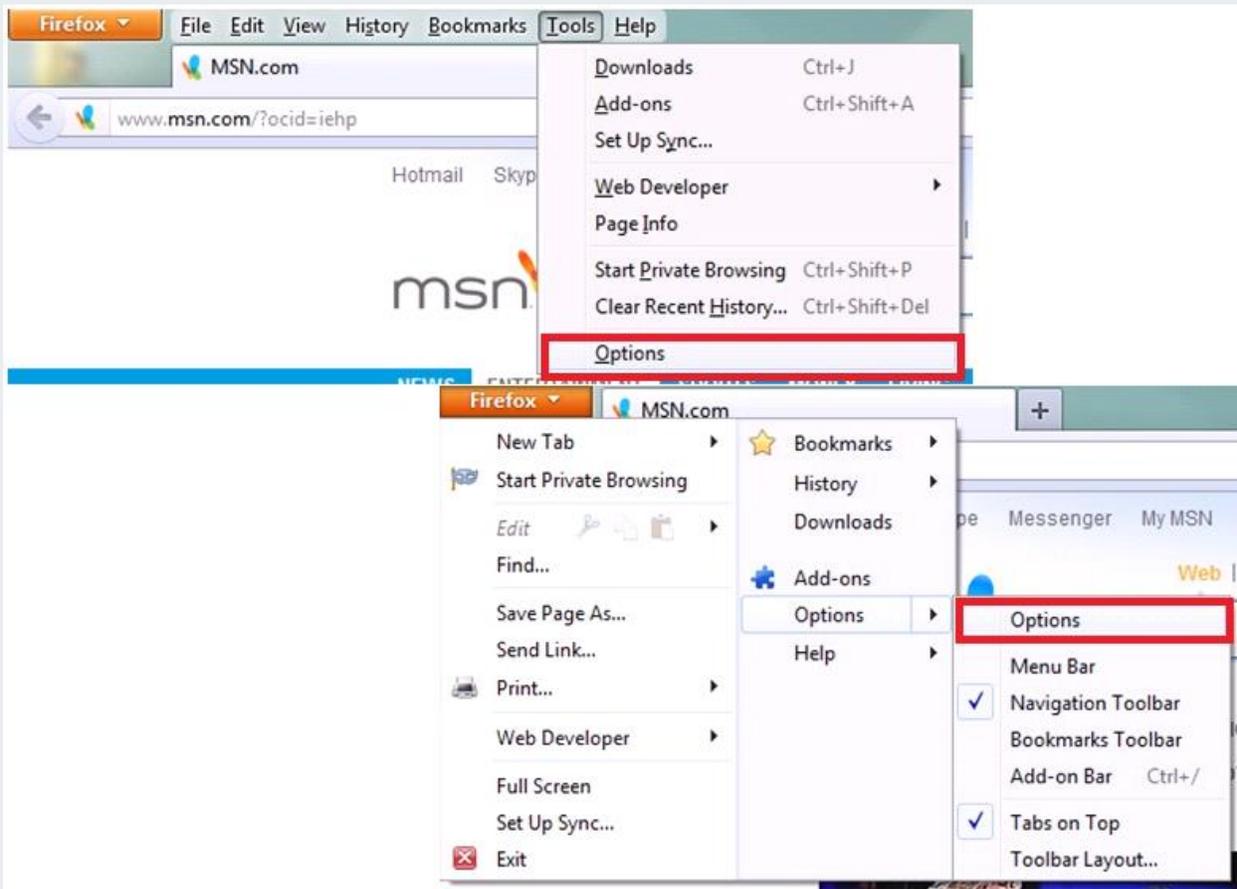
a) If a subscriber is using Firefox 29 they will access the browser Options a little differently. The browser no longer has a Firefox drop down menu.

b) The subscriber will need to ensure that they are clicking on the button with the three lines in the top right corner.
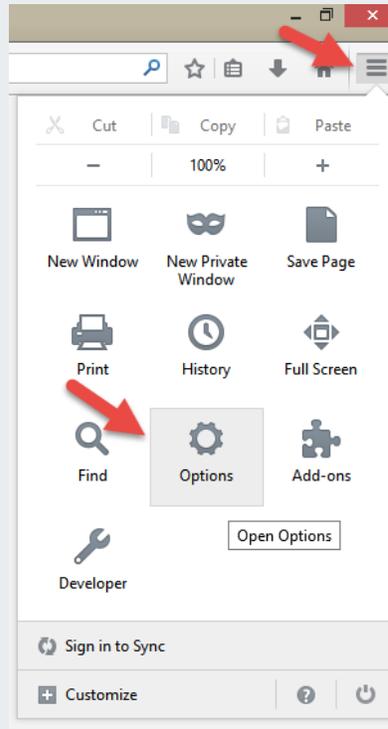
For Mac users they can select the menu button to the right or the Firefox dropdown from the left:
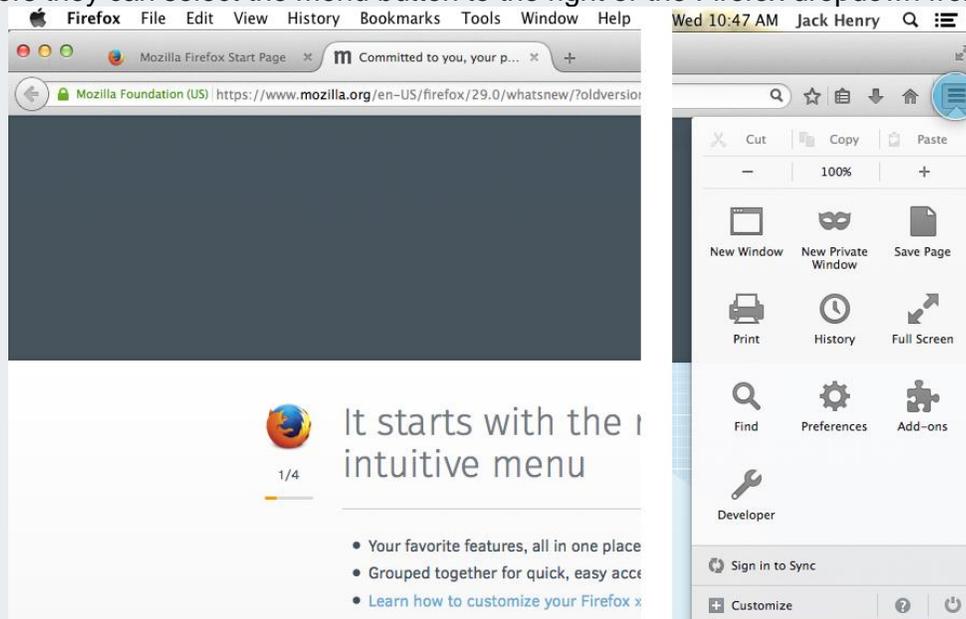
a) Then they will click on Options from the menu that drops down. *For Mac users they would select Preferences.*

  i) If the Options/Preferences is not listed the subscriber may have customized this menu. To correct this have the subscriber select the Customize option at the bottom.
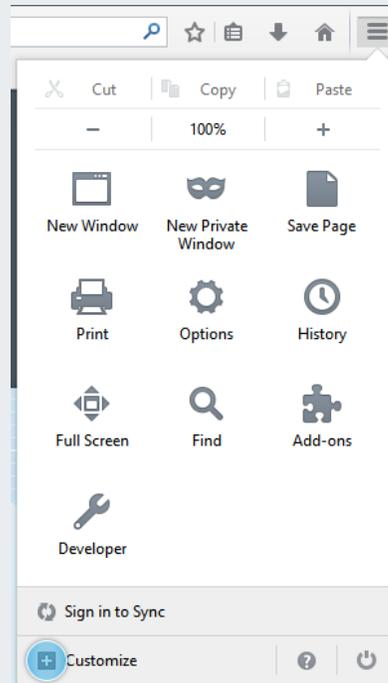
ii) From this next window they can click Options/Preferences and drag it into the menu box.
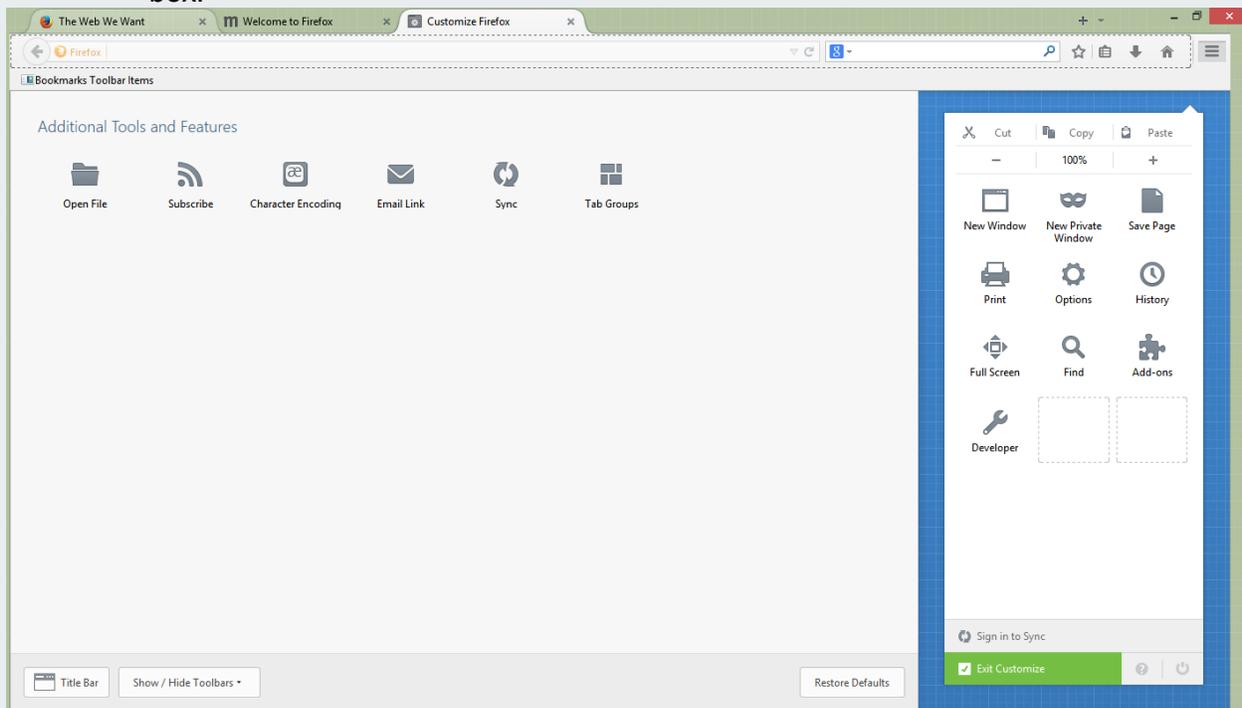
c) From here the settings will be exactly the same, continue to step 2.

ProfitStars®

2) Go to the *Content* tab and click on **Exceptions** in the *Pop-up* blocker area to add both of the URLs into the "*Allowed Sites*" and then click **Close**.
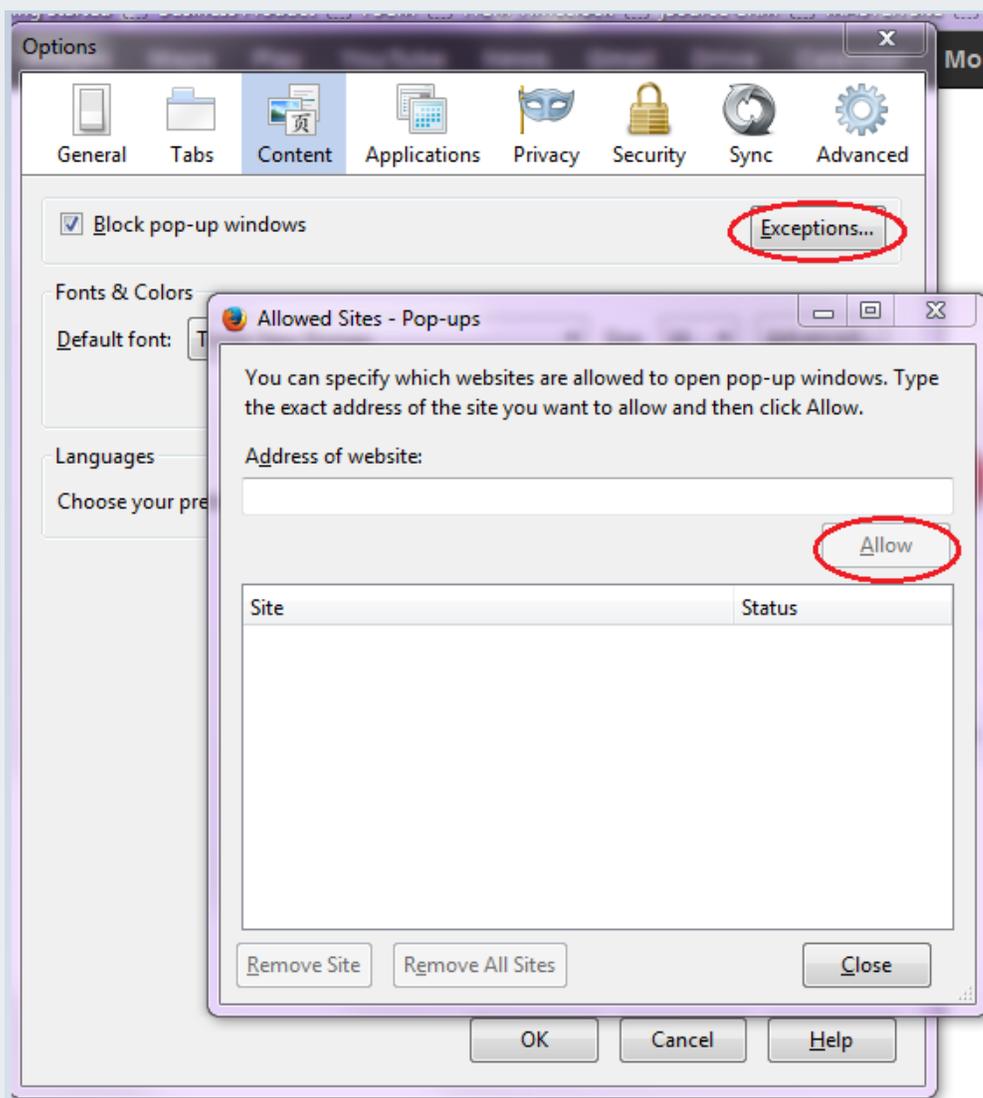
3) Then, click on **Privacy** and select **Firefox will: "Use Custom Settings for History."** Next to the area, "*Accept cookies from sites.*" Click on **Exceptions,** add both URLs, and then click on **Allow,** then **Close.**
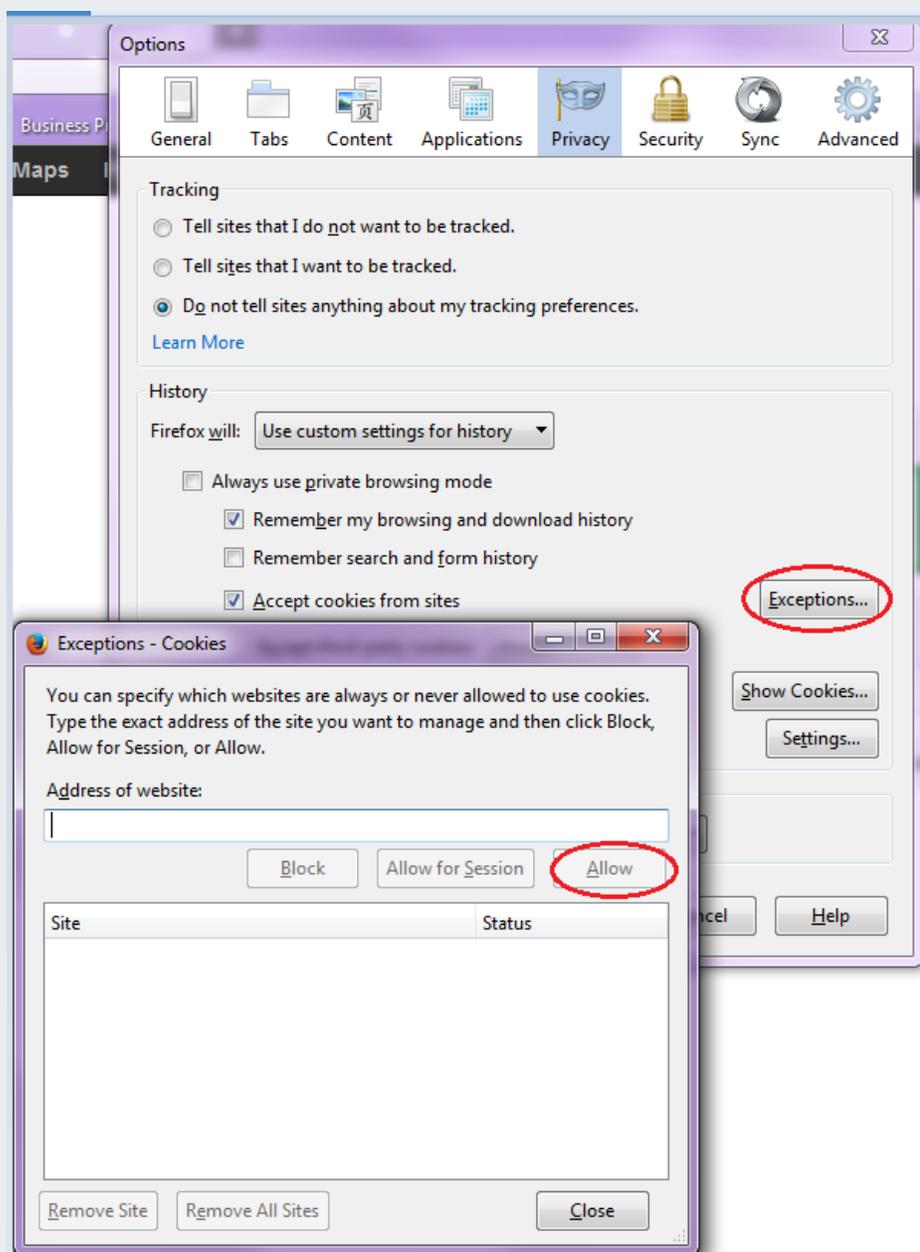
4) Click **Ok**, and then restart the browser and try again.
   a) If the above settings do not work, go through the rest of the browser settings with the subscriber.

   Note: If the above steps did not resolve the issue, select Additional Steps.

ProfitStars®

Chrome

1. On your browser toolbar, select ☰ and then **Settings.** Mac users can select **Chrome** > **Preferences** or the **Menu** button.
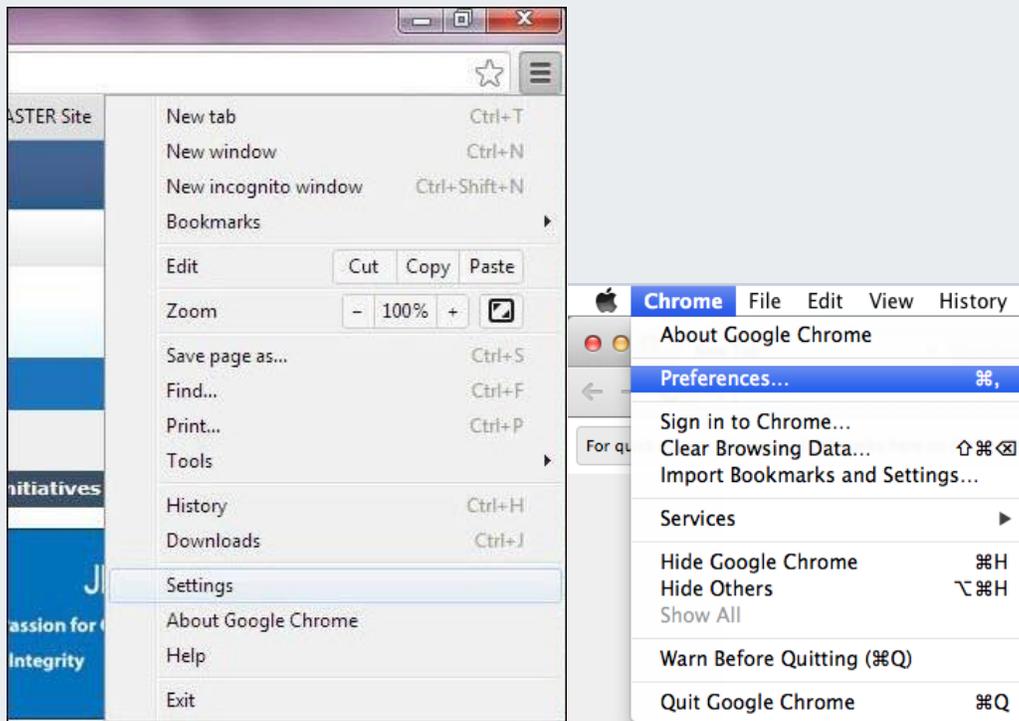
2. Click on "*Show Advanced Settings,*" scroll down, and then click on **Content Settings** under the *Privacy* section. Under the *Cookies* section, click on **Manage Exceptions** and then enter the URLs under **Hostname Pattern** and select **Allow** for the *Behavior.* Once the URLs have been entered, click **Done**.

ProfitStars
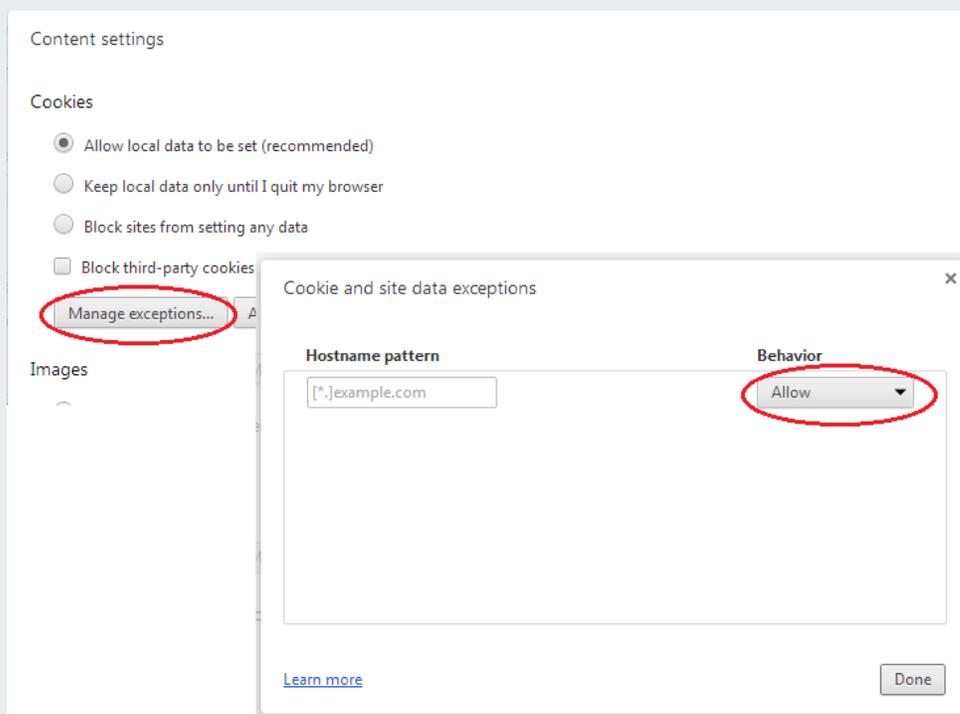
3. Scroll down to the *Pop-ups* area and click on **Manage Exceptions**. Enter the URLs and select **Allow.** Once they have both been entered, - click **Done**.
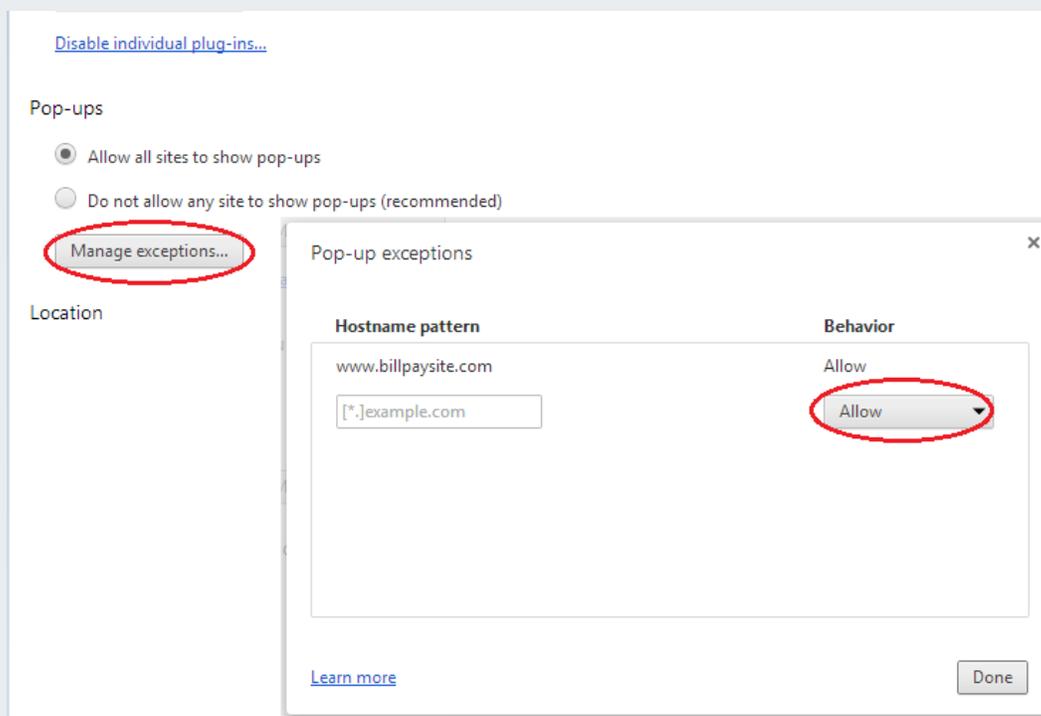
4. Click on **Done**, and then restart the browser and try again.
   - If the above setting does not work, go through the rest of the browser settings with the subscriber.

Note: If the above steps did not resolve the issue, select <u>Additional Steps</u>.

<u>Back to Initial Steps</u> Or <u>Bank to Banking URL</u>

Safari 6.0.5 and up

1. In Safari, type the URL https://www.billpaysite.com into the address bar, then click **Enter**.
2. Highlight the entire web address, then drag and drop it to the **Top Site** button (*pictured below*). Press **Command+Q** to close the Safari session.
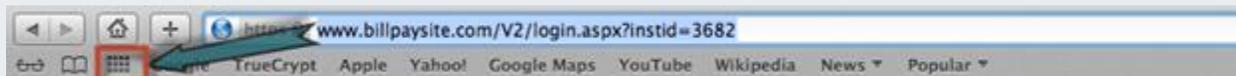
3. Open Safari and log into Internet Banking again, and then go into Bill Pay. Your browser should now work correctly with Bill Pay.

Note: If the above steps did not resolve the issue, select *Additional Steps*.

Back to Initial Steps Or Bank to Banking URL

ProfitStars®

Additional Steps to Browser Settings

Choose the type of browser that the subscriber is currently using to complete the additional steps for the browser.

Internet Explorer

Version 8 and 9

Version 10 or 11

Firefox

Version 10 and up to 22

Version 23 and Above

Google Chrome

Version 19 and up to 27

Version 28 and Above

Safari

Version 6.0.5 and Above

ProfitStars®

Additional Steps for Internet Explorer 8 and 9

1. On your browser toolbar, select **Tools** > **Internet Options.**
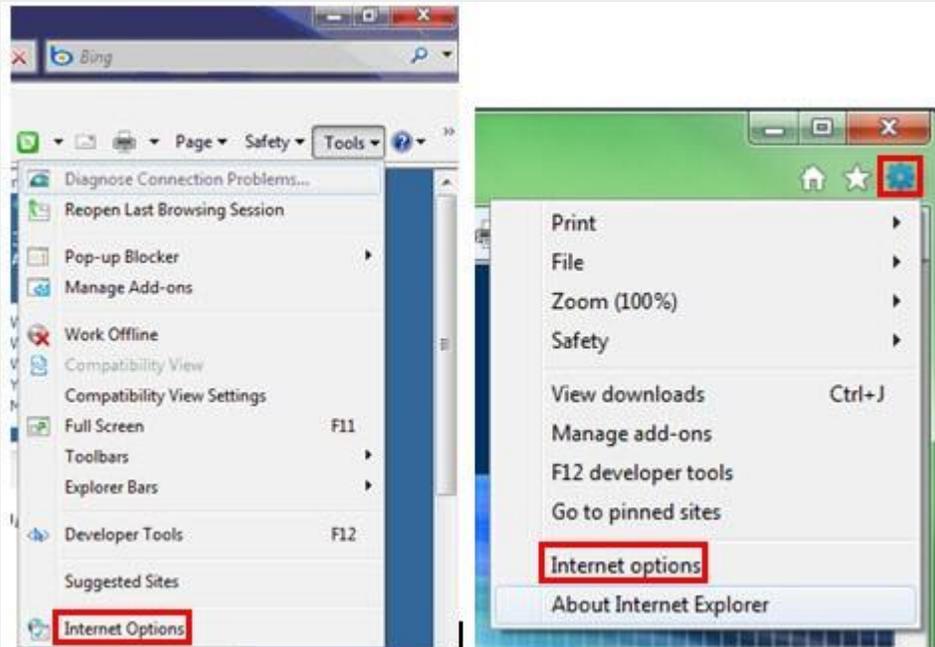
2. On the *General* tab, in the "*Browsing History"* section, select **Delete**.
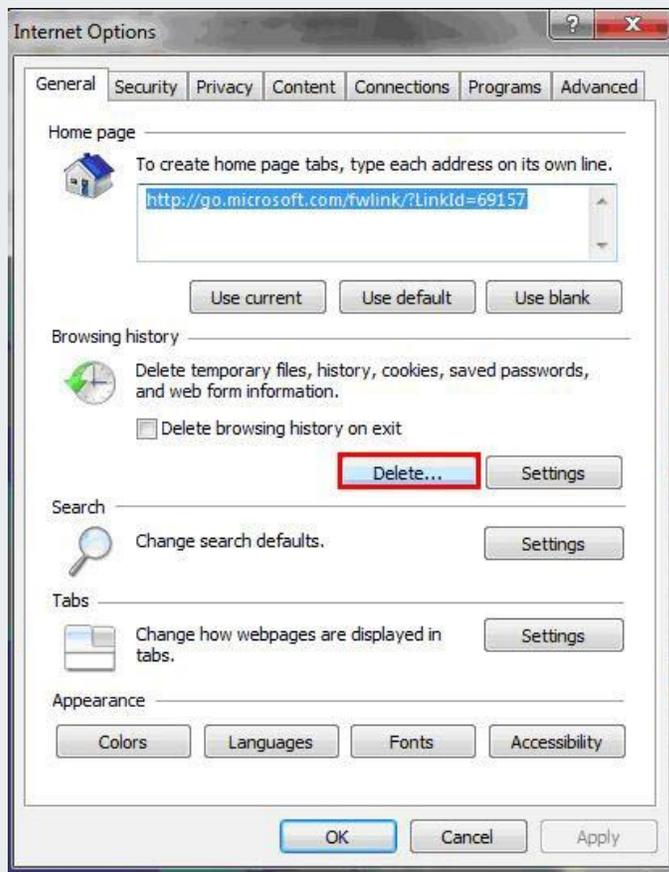
3. Clear all check boxes except the **Temporary Internet Files** check box, and then select **Delete**.

ProfitStars®
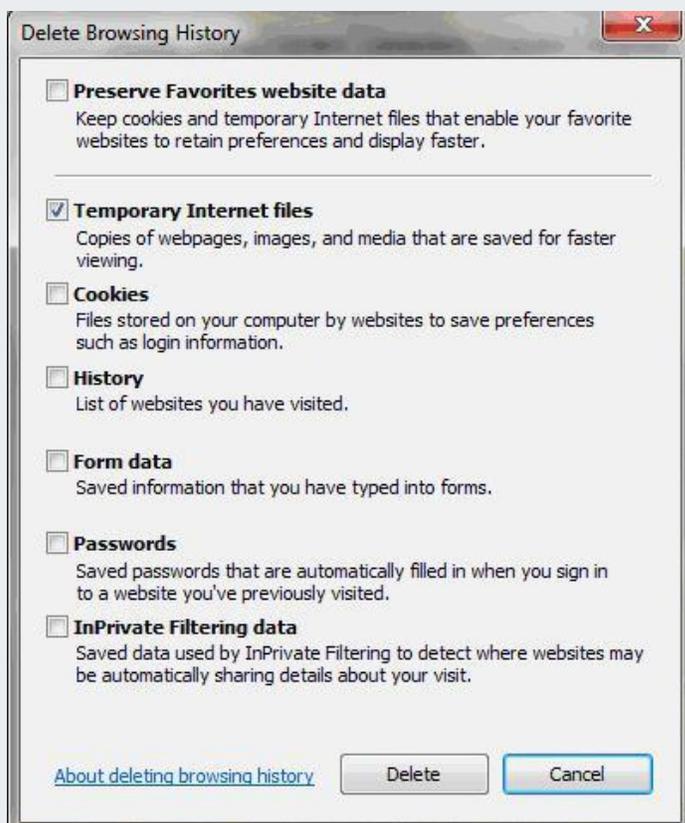
A dialog box displays the files being deleted.

(i) This step may take a few minutes if the cache has not been cleared for a while.

4. On the *General* tab, in the "*Browsing History"* section, select **Settings**.

ProfitStars®

5. Verify **Every Time I Visit the Webpage** is <u>selected</u>, and then select **OK**.

ProfitStars
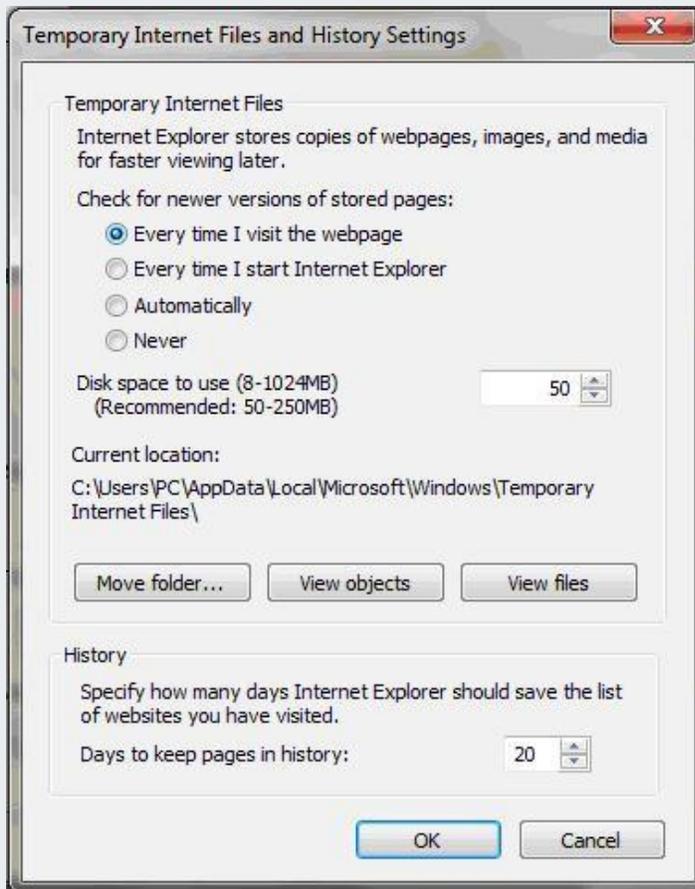
6. On the *General* tab, select **Languages** at the bottom and verify that **English (United States) [en-US]** is the first or only language listed.

ProfitStars®

7. Select the *Content* tab.
8. In the "*Content Advisor"* section, verify the first button reads **Enable**. If it does not, select **Disable**.

ProfitStars®
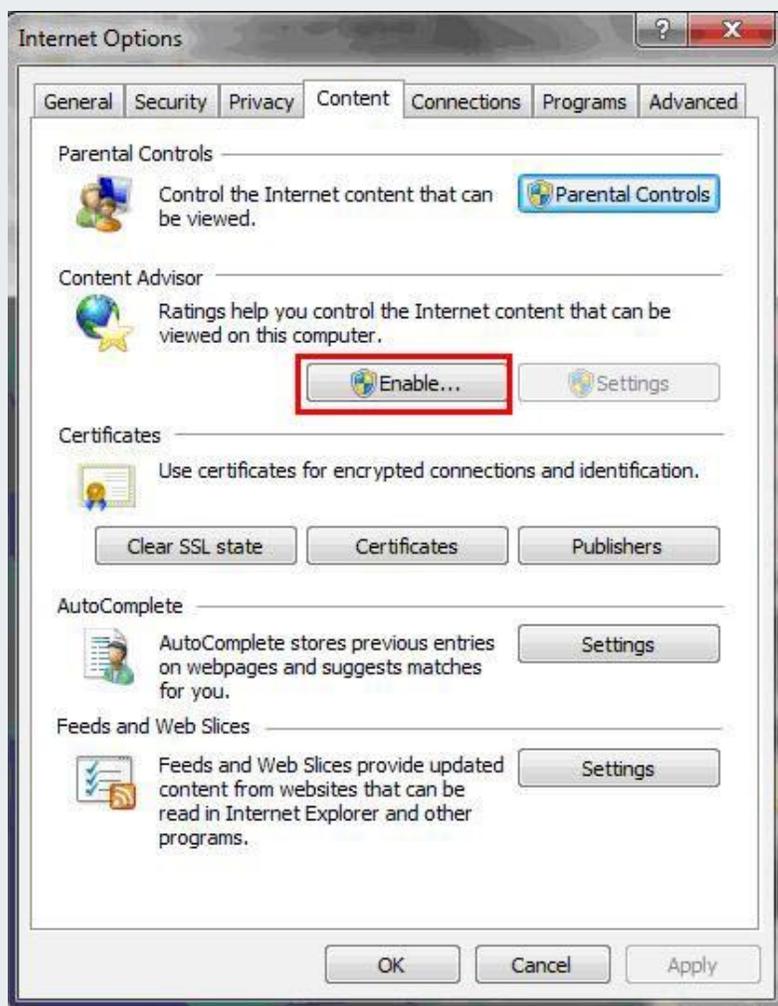
If you select "Disable," to continue you need the password chosen at the time your computer was set up or the password for your system's network.

9. Select the *Advanced* tab.
10. In the "*Settings"* box, scroll all the way to the bottom and verify the **SSL 3.0** and **TLS 1.0** check boxes are selected.
11. Choose an operating system and follow the corresponding steps.

System	Steps
Windows Vista	1. Select **OK**. 2. Restart your computer.
Windows XP	1. Select **OK.** 2. Restart the browser

ProfitStars®

Windows 7, 8, and 8.1	1. Verify the **TLS 1.1** and **TLS 1.2** check boxes are cleared. 2. Select **OK.** 3. Restart the browser.
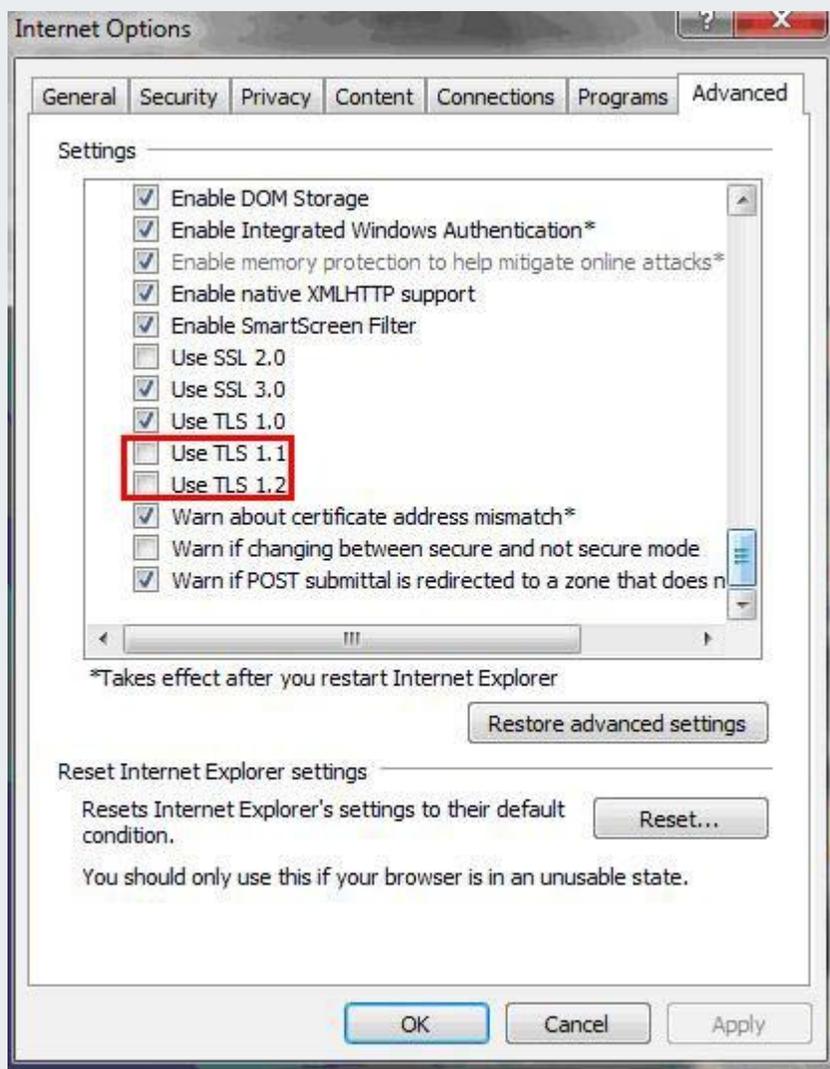
ProfitStars®

Additional Steps for Internet Explorer 10 or 11

1. On your browser toolbar, select **Tools** > **Internet Options.**

2. On the *General* tab, in the *Browsing History* section, select **Delete**.

ProfitStars®
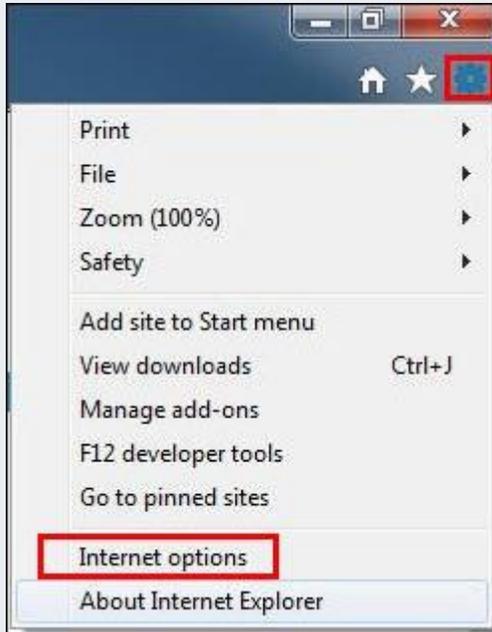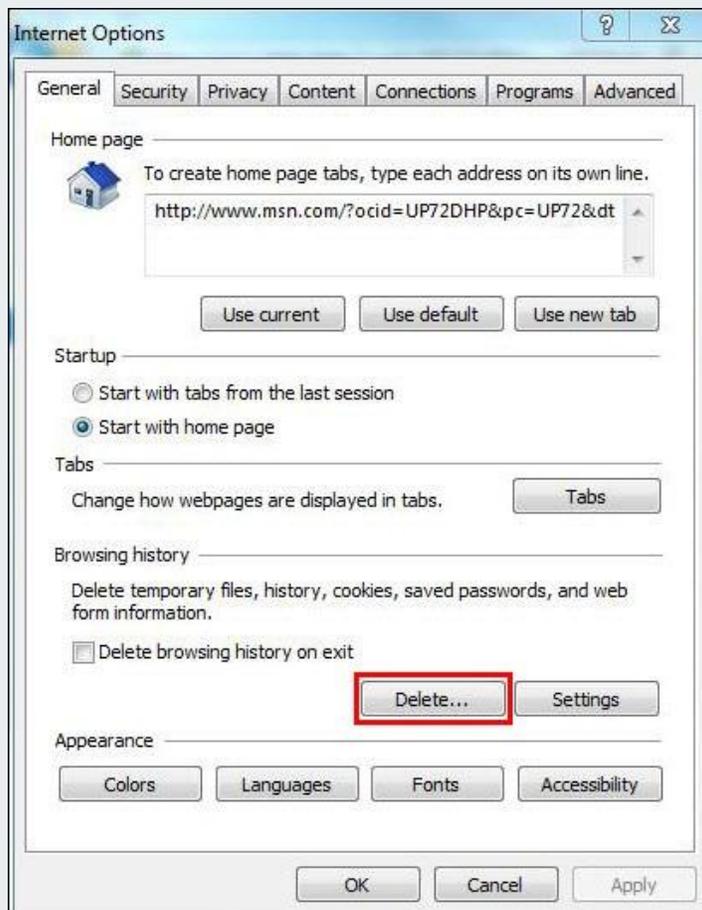
The "*Delete Browsing History*" dialog box appears.

ProfitStars®
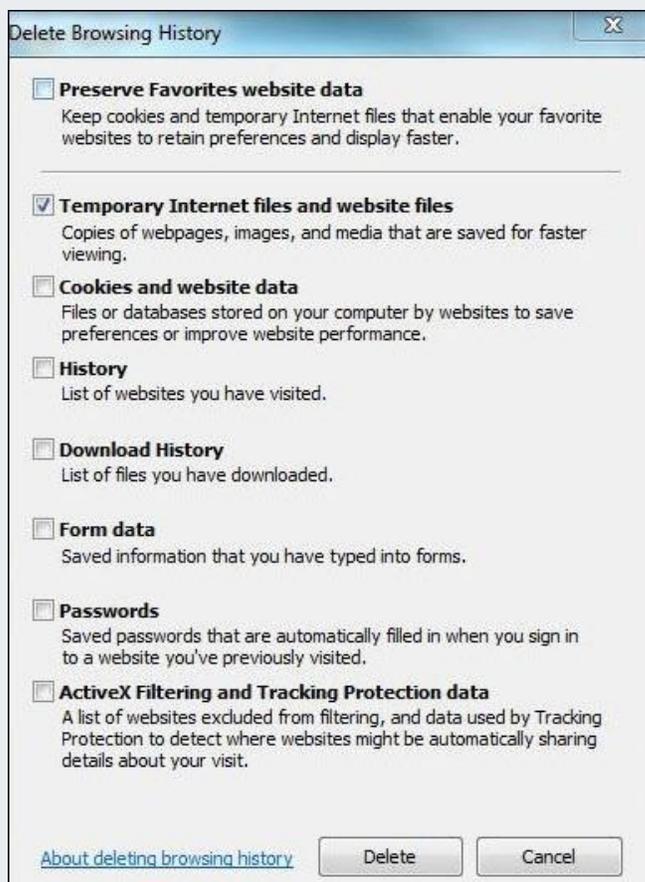
3. Clear all but the **Temporary Internet Files and Website Files** check box, and then select **Delete**.
   - While the browser clears itself, Internet Explorer 10 or 11 allows you to continue with the settings. Once the browser is finished deleting the files, *Internet Explorer has finished deleting the selected browsing history* appears.
4. On the *General* tab, in the "*Browsing History*" section, select **Settings.**
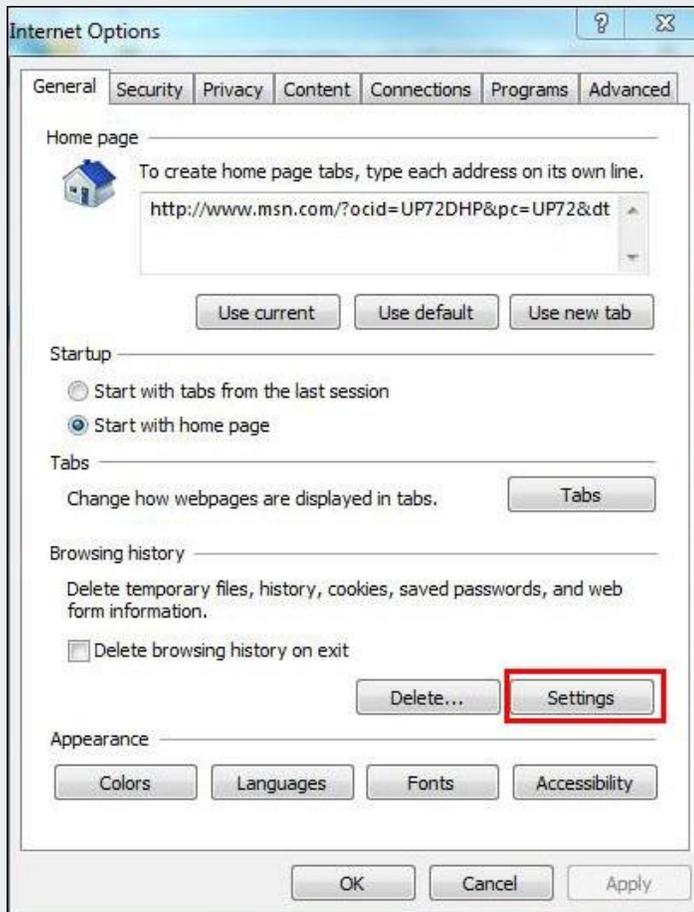
The *Website Data Settings* dialog box appears.

ProfitStars®
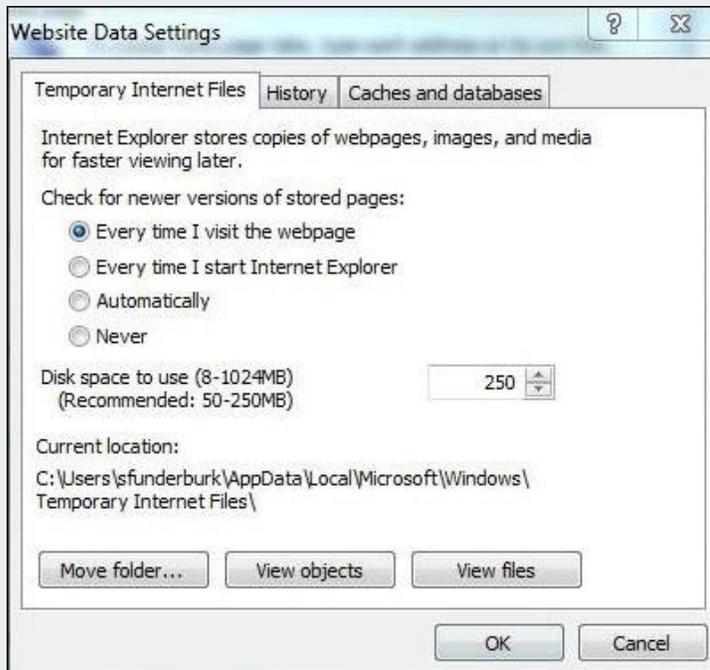
5. Verify **Every Time I Visit the Webpage** is selected, and then select **OK**.
6. On the *General* tab, select **Languages**.
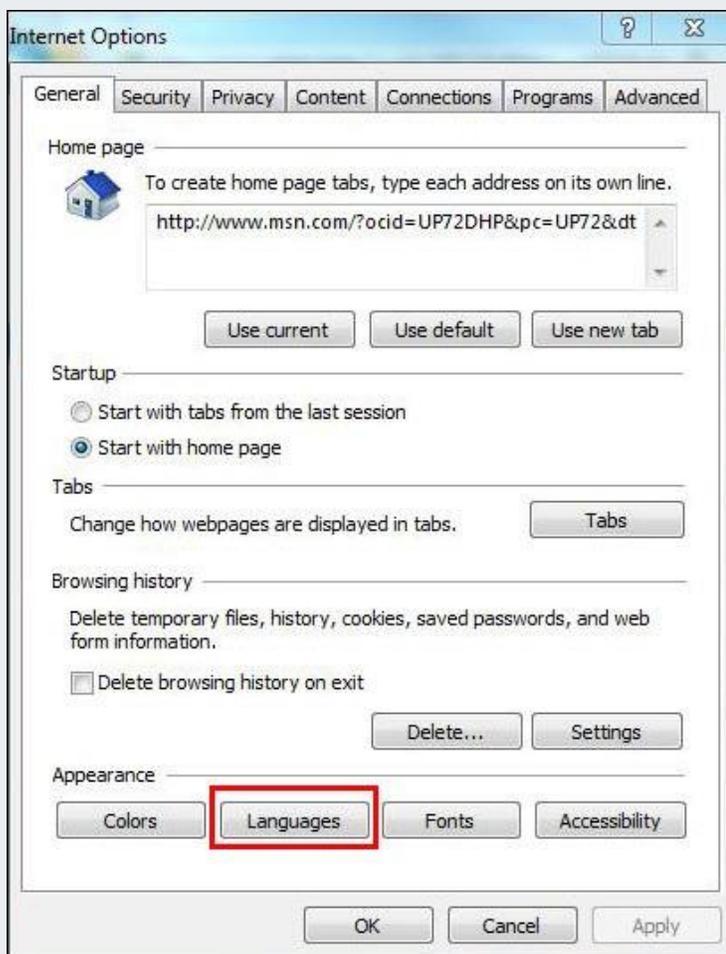
7. Verify **English (United States) [en-US]** is the first or only language listed and select **OK**.

8. On the *Advanced* tab, in the "*Settings*" section, verify the **SSL 3.0** and **TLS 1.0** check boxes are <u>selected</u> and the **TLS 1.1** and **TLS 1.2** check boxes are <u>cleared</u>.
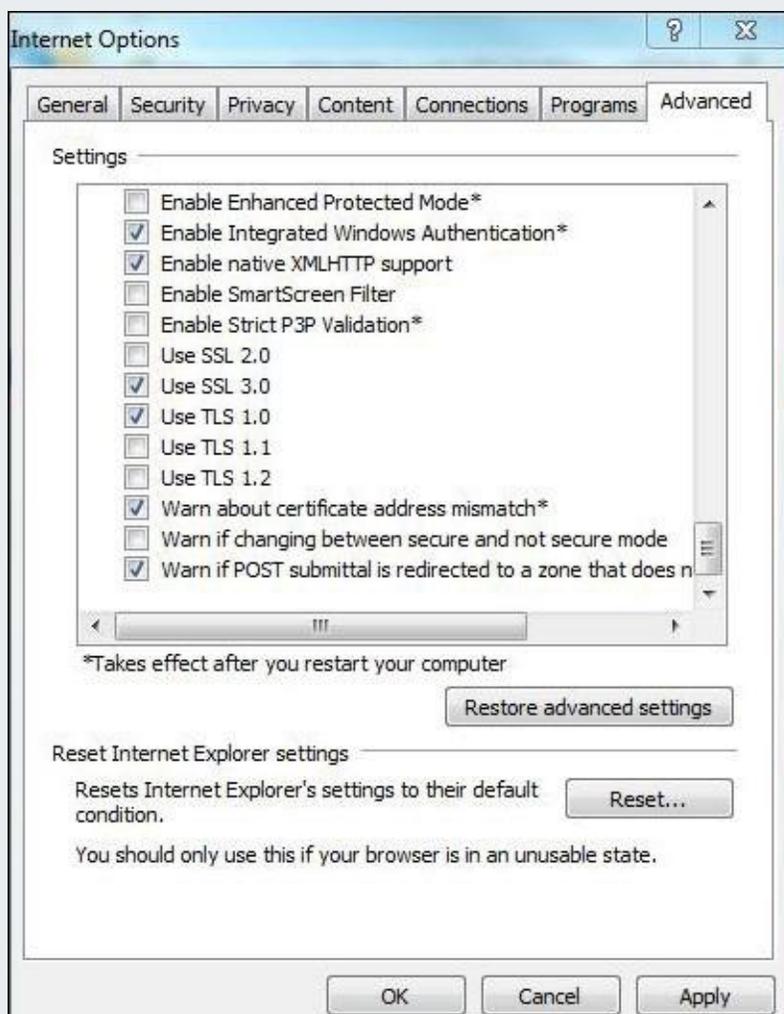
9. Select **OK** and restart the browser.

ProfitStars®

Additional Steps for Firefox 10 and up to 22

1. On your toolbar, select **Tools** > **Options,** OR select **Firefox** > **Options** > **Options.**
    Mac users, select
    Firefox > Preferences
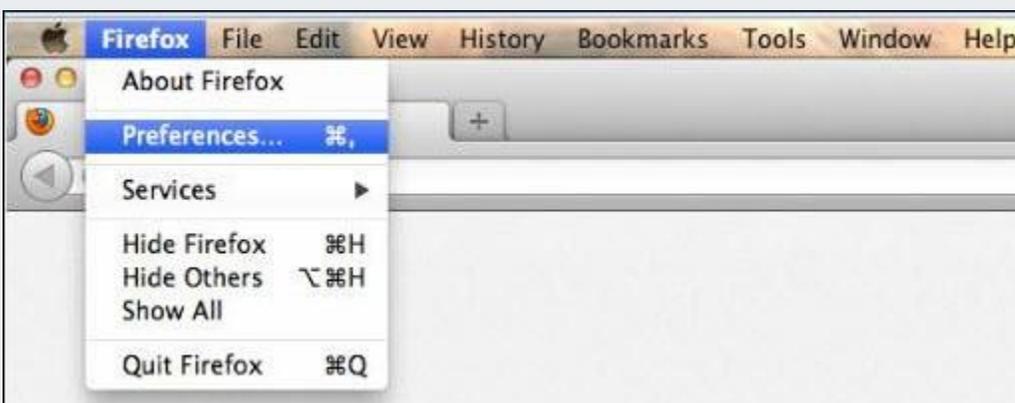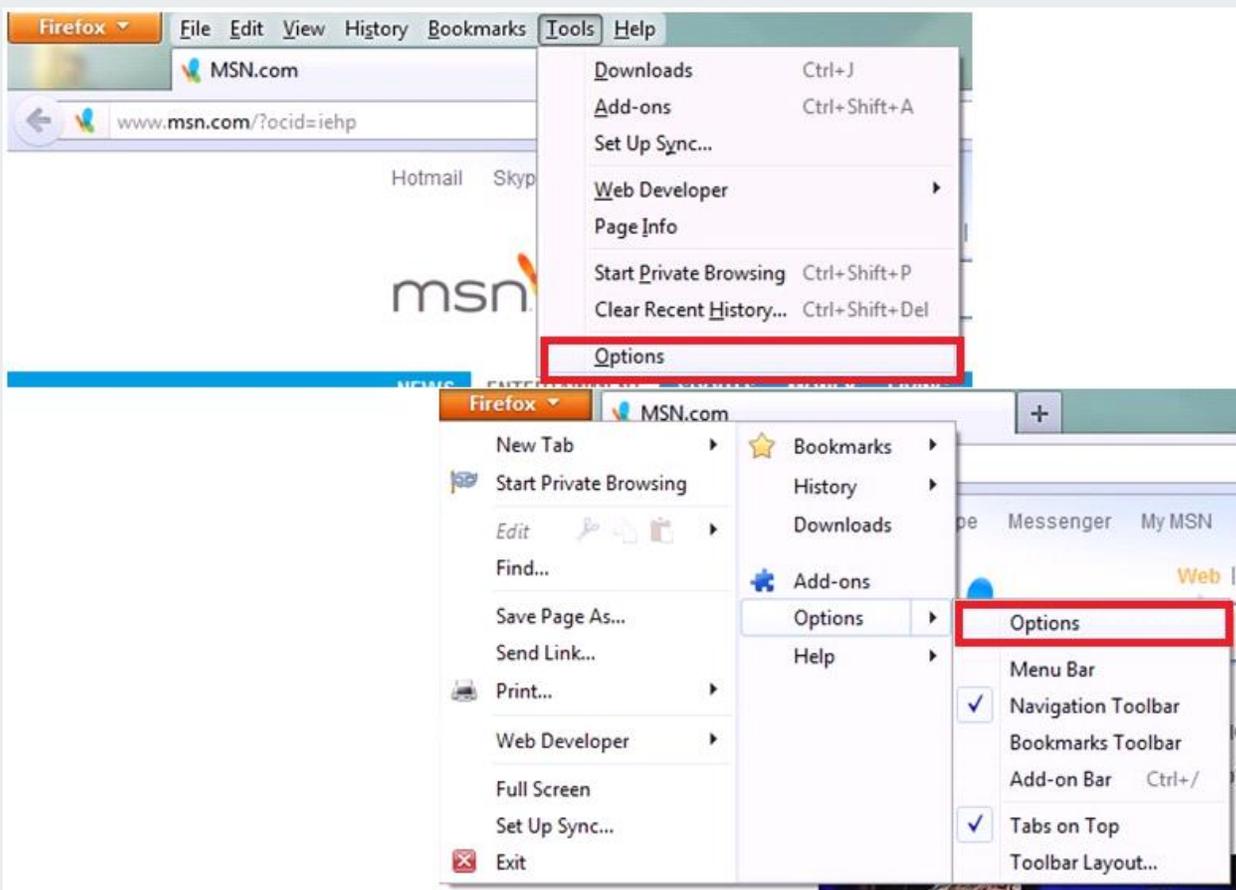
2. Select the **Content** icon, and then select the **Block Pop-up Windows, Load Images Automatically and Enable JavaScript** check boxes.

3. On the **Content** icon and in the "*Languages*" section, select **Choose**.
4. Verify **English/United States [en-us]** is the first language listed.

5. Select the **Advanced** icon, and then select the *Network* tab.
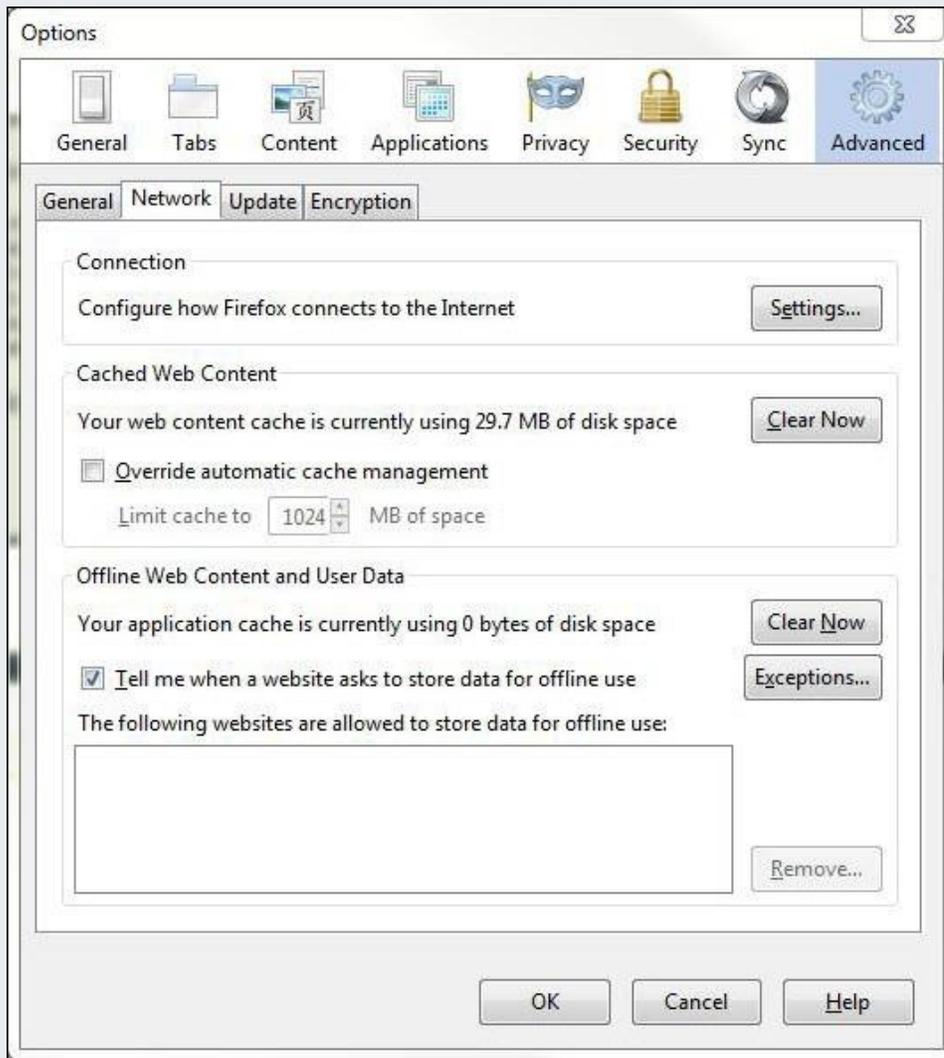
6. Select **Clear Now** in the "*Cached Web Content*" section
7. Select the *Encryption* tab

ProfitStars®
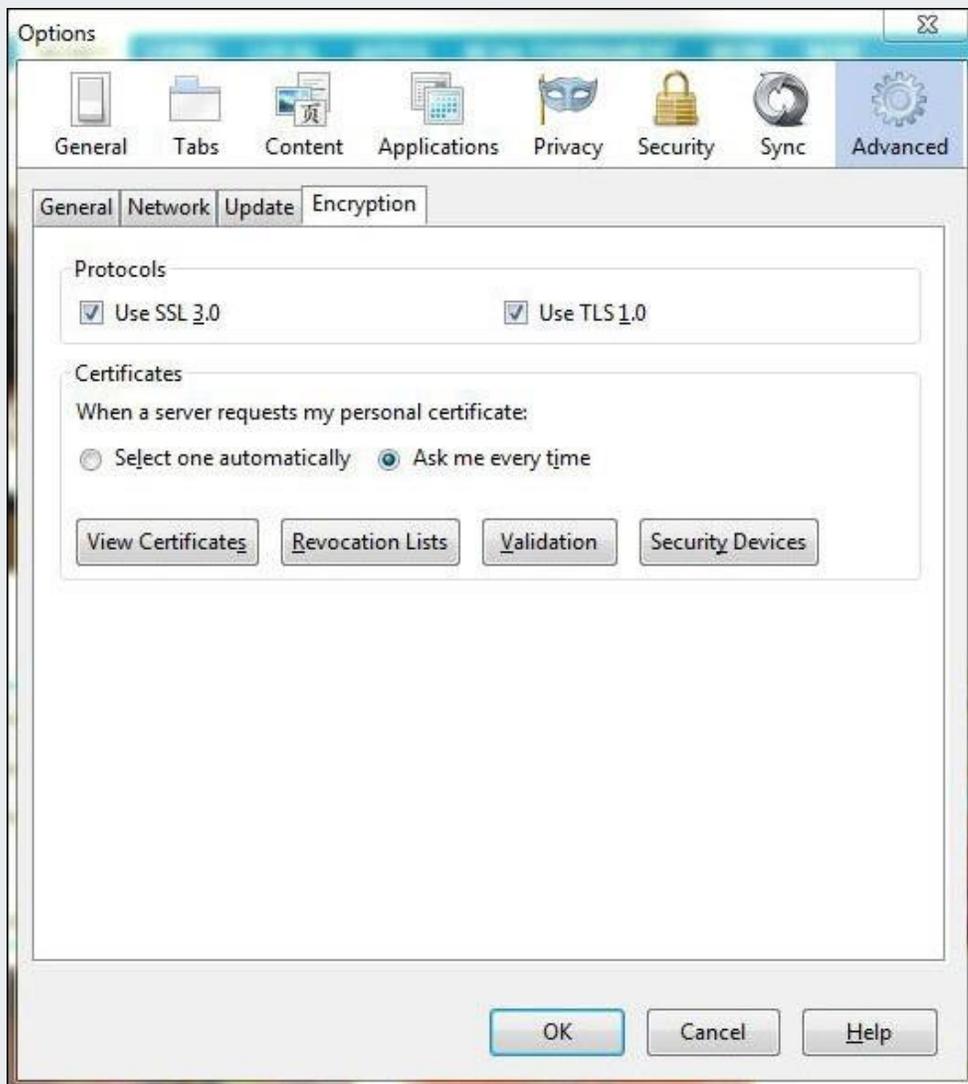
8. Verify the **Use SSL 3.0** and **Use TLS 1.0** check boxes are <u>selected</u>.
9. Select **OK** and refresh the browser. Mac users select the red dot on the top left corner of the window and restart the browser.

Additional Steps for Firefox 23 and Above

1. Have subscriber click on "**Tools**" and go to "**Options**". Or, click on the Firefox drop down menu and click on "**Options**" to open another menu and then "**Options**" again. Mac Users select **Firefox** > **Preferences. For Firefox 29 and up, go to section 1a below.**
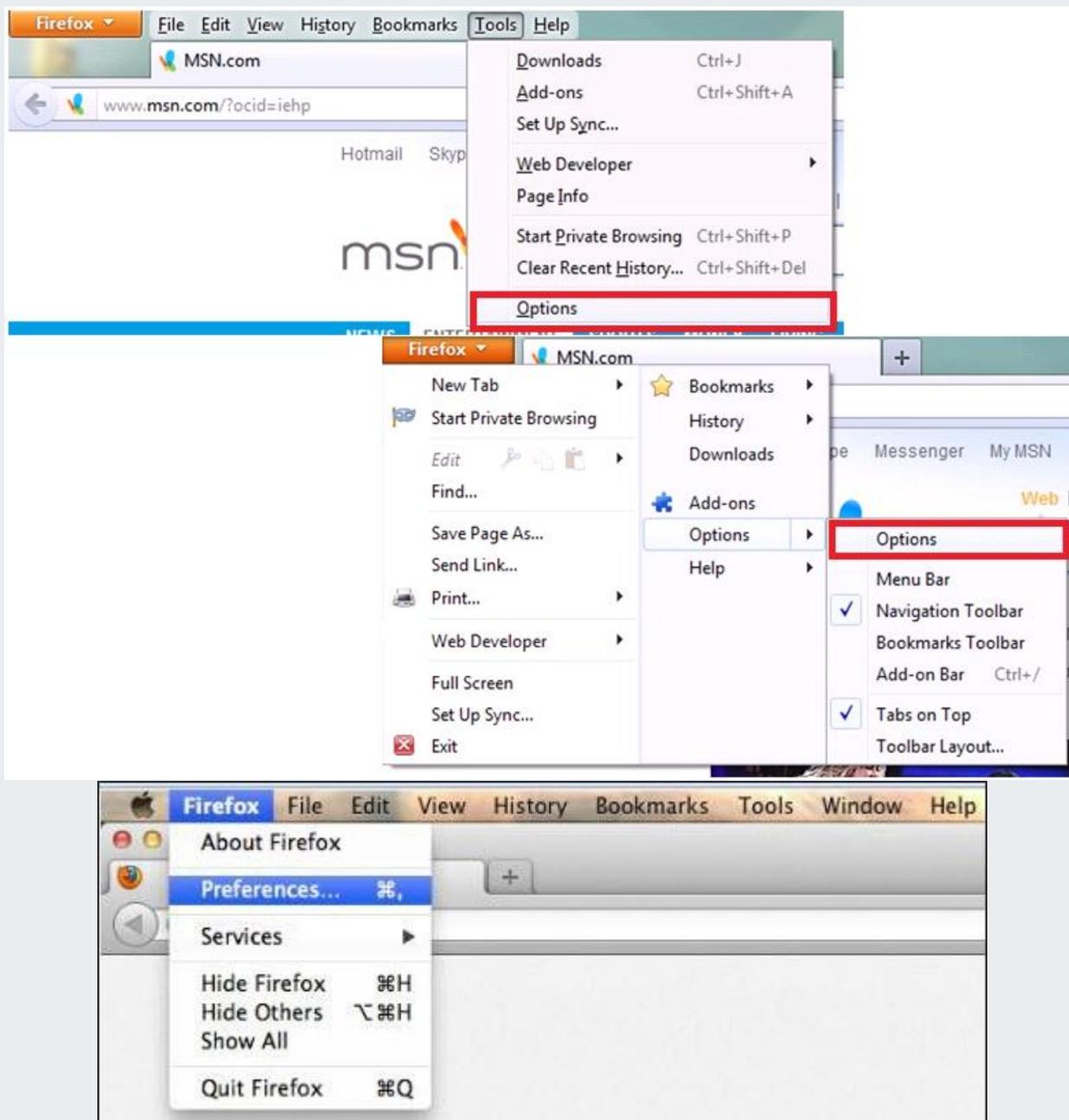
b) If a subscriber is using Firefox 29 they will access the browser Options a little differently. The browser no longer has a Firefox drop down menu.

c) The subscriber will need to ensure that they are clicking on the button with the three lines in the top right corner.
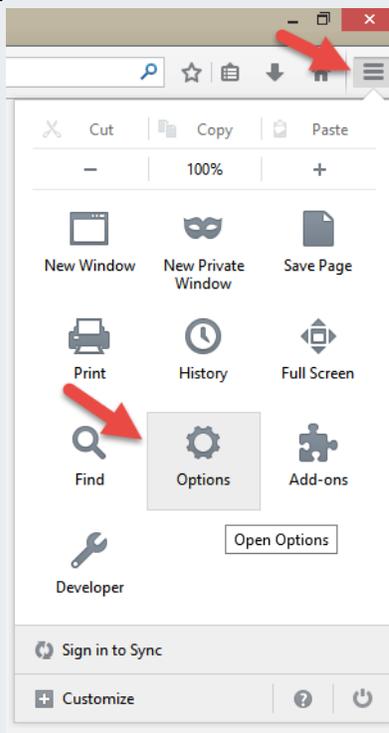
For Mac users they can select the menu button to the right or the Firefox dropdown from the left:
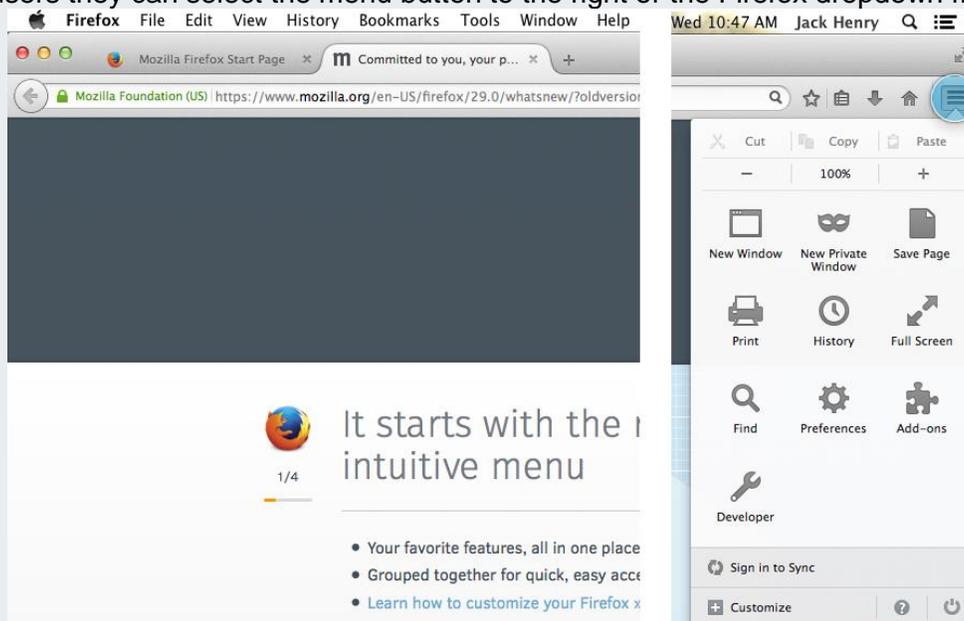
d) Then they will click on Options from the menu that drops down. *For Mac users they would select Preferences.*

i) If the Options/Preferences is not listed the subscriber may have customized this menu. To correct this have the subscriber select the Customize option at the bottom.

ProfitStars®
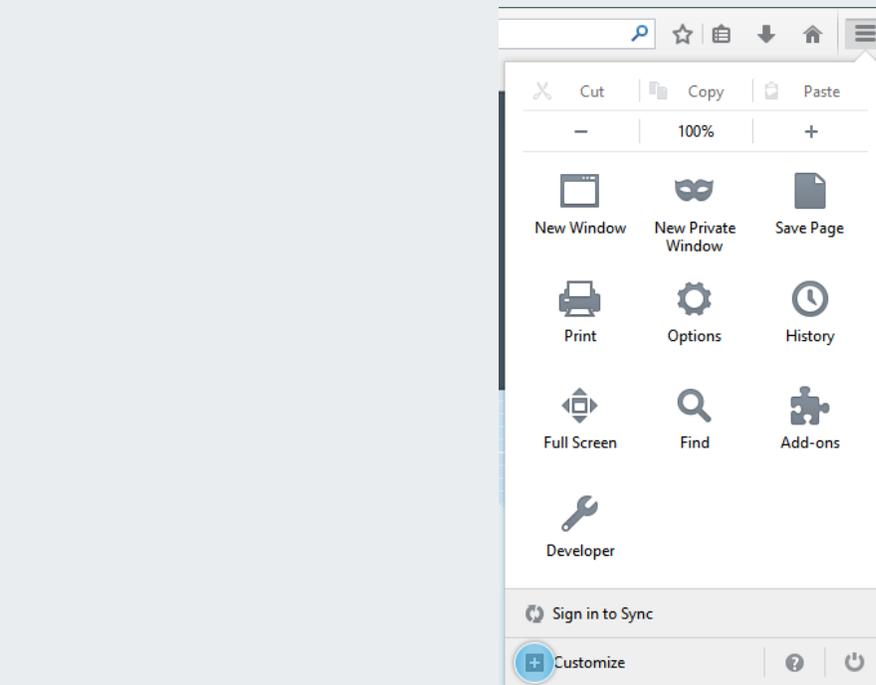
    ii) From this next window they can click Options/Preferences and drag it into the menu box.
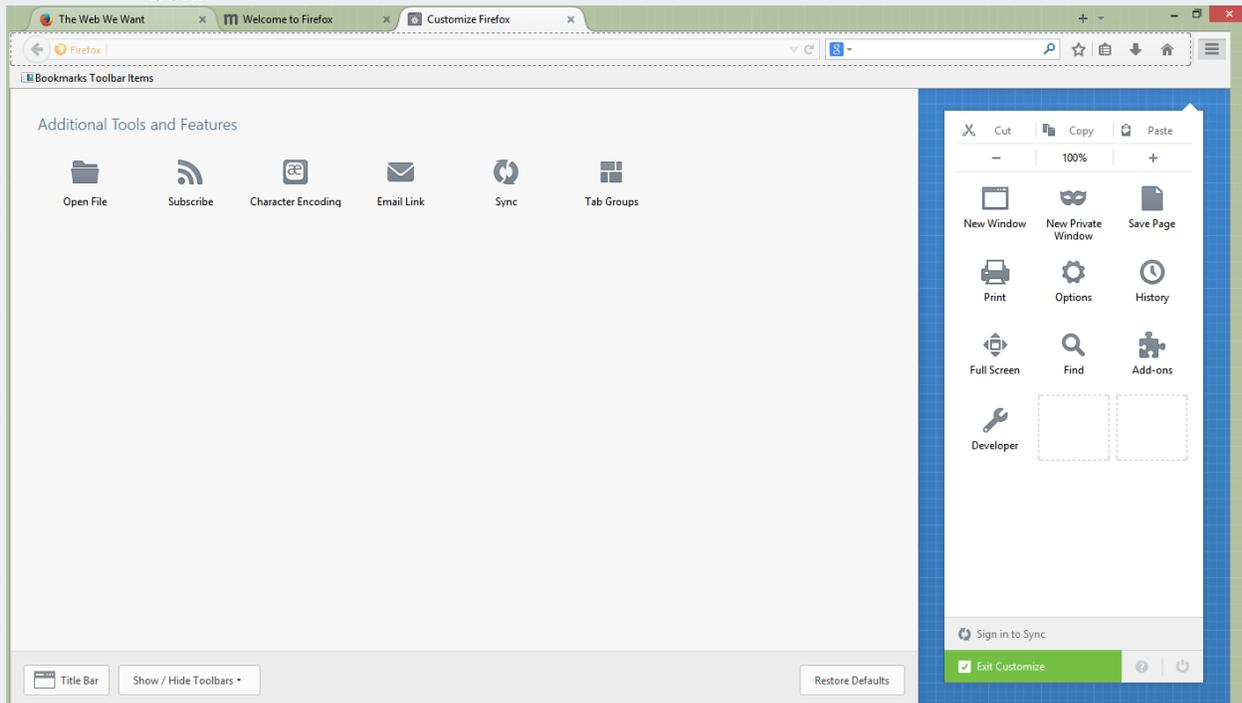
    e) From here the settings will be exactly the same, continue to step 2.

ProfitStars®

2. While under the **Content** tab, a section called "Languages" will appear at the bottom, click on "**Choose**" and double check to ensure that "**English/United States**" is the first language listed.
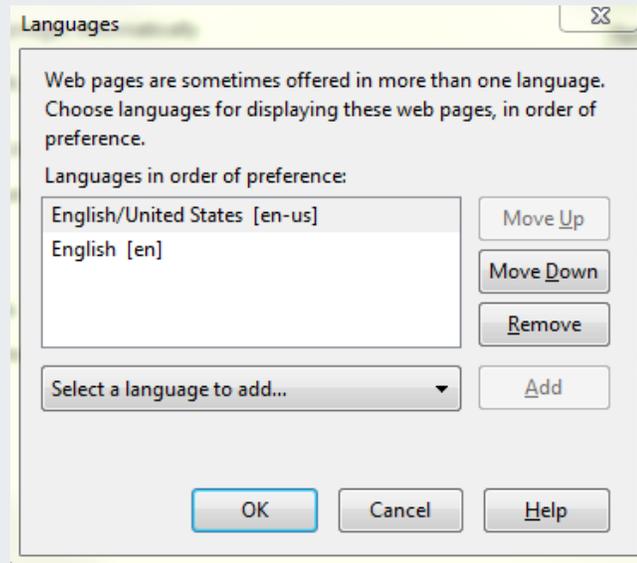
3. Click on the "**Advanced**" icon, then **Network** tab. To empty the cache, click on the "**Clear Now**" button under the "*Cached Web Content*" area.
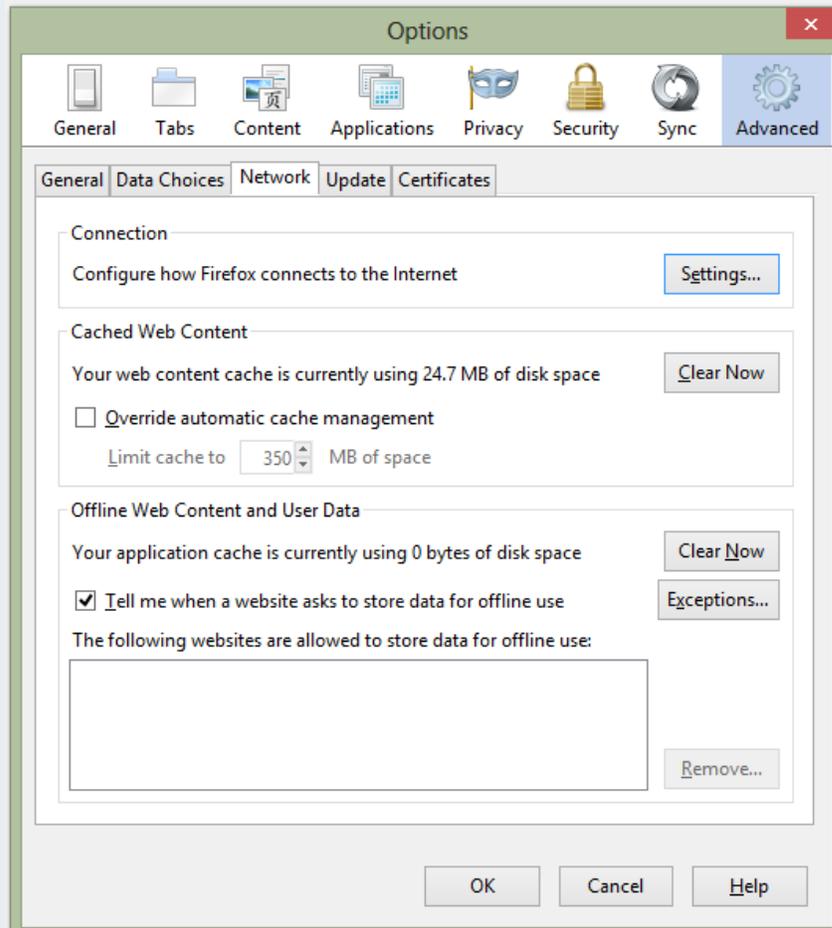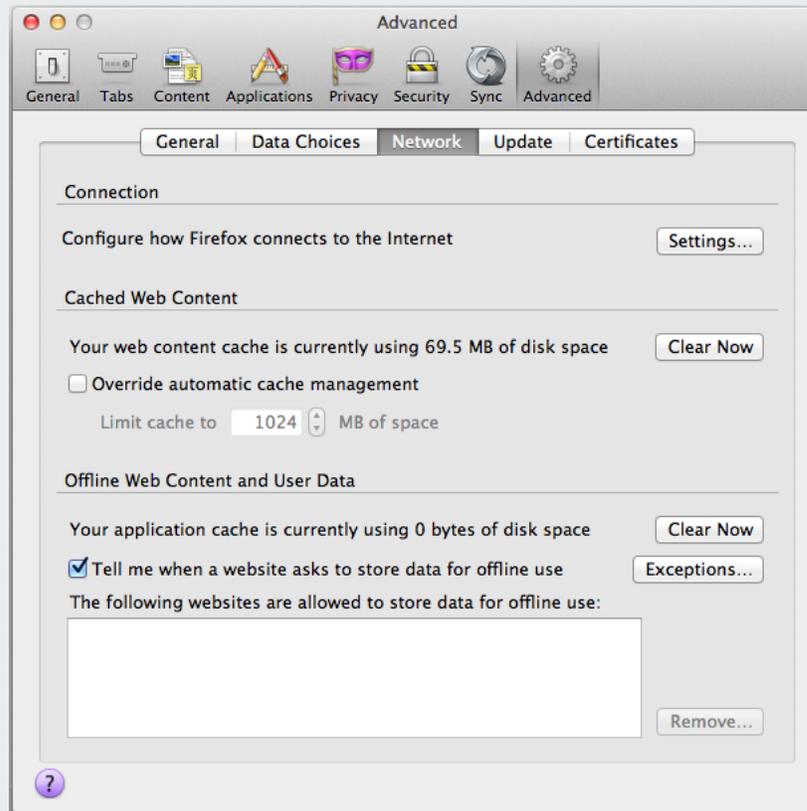
*You will not need to verify the TLS/SSL settings as they are automatically set correctly for the subscriber.

4. Click "**OK**" and refresh browser. Mac users select the **red dot** on the top left corner of the window and restart the browser.

Back to Initial Steps or Back to Additional Steps

Additional Steps for Google Chrome 19 and up to 27

1. On your browser toolbar, select ☰ and then **Settings.** Mac users can select **Chrome** > **Preferences** or the **Menu** button.

2. On the **History** menu, select **Clear All Browsing Data**.

ProfitStars®
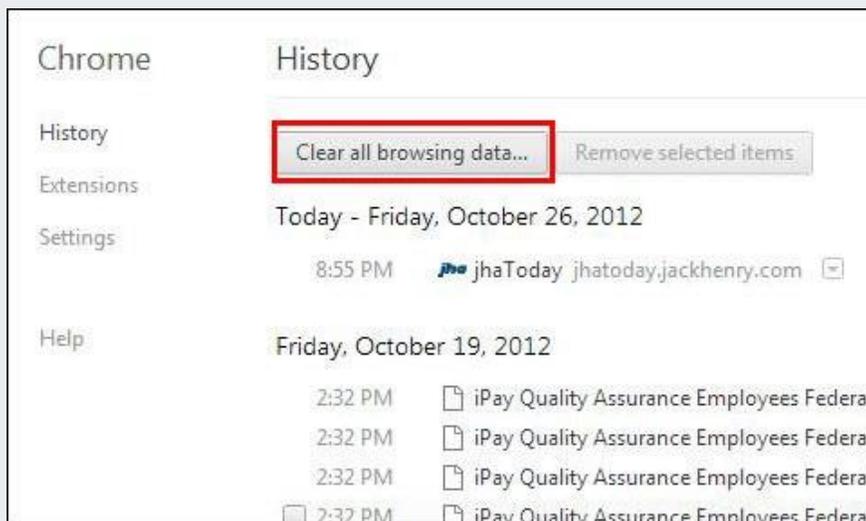
The following dialog box appears.

3. Select the **Clear Browsing History** and **Empty the Cache** check boxes.
4. From the **Obliterate the Following Items From** list, select **The Beginning of Time** to clear your entire browsing history.
5. Select **Clear Browsing Data**.
6. On the **Settings** menu, select **Show Advanced Settings**.

7. Scroll down to the "*Languages*" section and select **Languages and Spell-checker Settings**.

8. Verify **English (United States)** is the first or only language listed and select **OK**.

9. Close **all** Google Chrome browsers and open a new one.

ProfitStars

Additional Steps for Google Chrome 28 and Above

1. On your browser toolbar, select ☰ and then **Settings.** PC users will need to select the **Menu** button, while Mac users can select **Chrome** > **Preferences** or the **Menu** button.
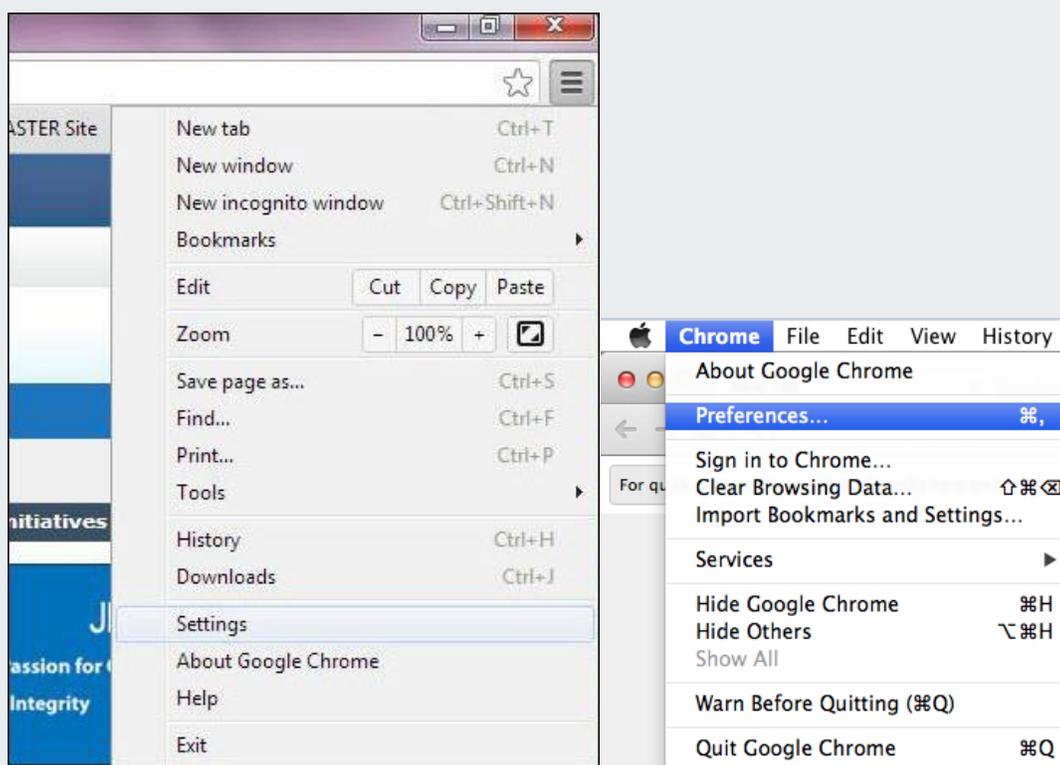
2. On the **History** menu, select **Clear All Browsing Data**.

The following dialog box appears.

3. Select the **Clear Browsing History** and **Empty the Cache** check boxes.
4. From the **Obliterate the Following Items From** list, select **The Beginning of Time** to clear your entire browsing history.
5. Select **Clear Browsing Data**.
6. On the **Settings** menu, select **Show Advanced Settings.**

ProfitStars®

7. Scroll down to the "*Languages*" section and select **Languages and Input Settings.**

8. Verify **English (United States)** is the first or only language listed and select **DONE**.

9. Close **all** Google Chrome browsers and open a new one.

ProfitStars

Additional Steps for Safari 6.0.5 and Above

1. On your toolbar, select **Safari** > **Preferences.**
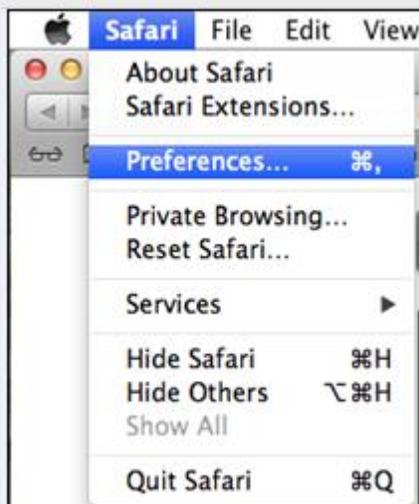
2. Select the **Security** icon.

3. For the **Web Content** settings, verify that the check box next to **Enable JavaScript** <u>is</u> selected and the check box next to **Block pop-up windows** <u>is not</u> selected.

4. For the **Internet plug-ins** settings, verify that the check box next to **Allow Java** and **Allow all other plug-ins** <u>is</u> selected.

5. Select the **Privacy** icon. Note what **Cookie** option is selected (needed for Step 7), then select **Never** for the **Block Cookies** setting.
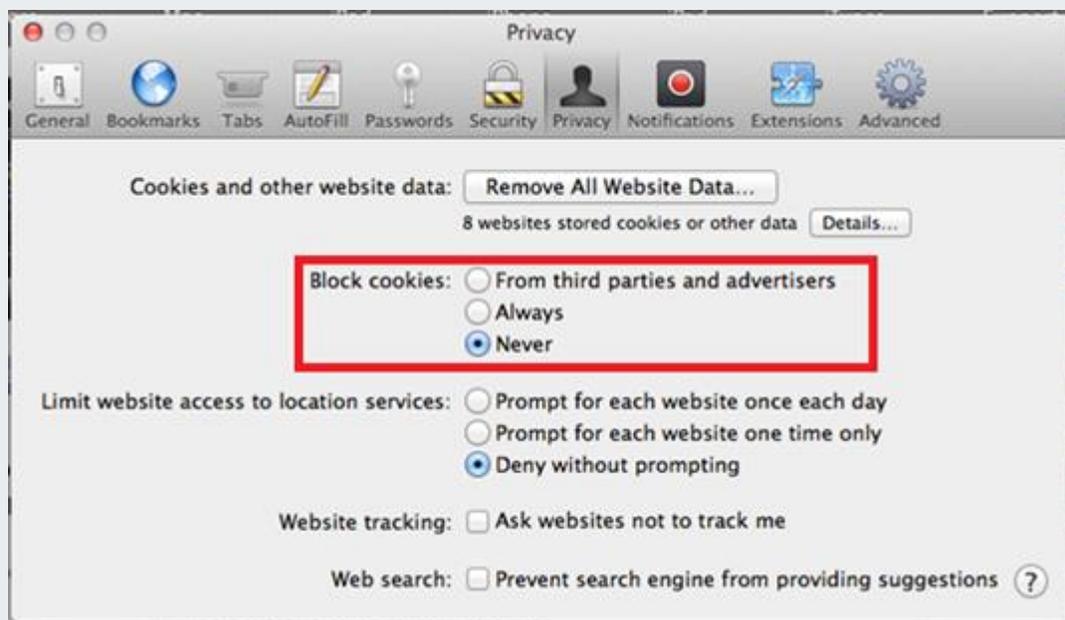
This is the only available option that allows session cookies.

6. Open Bill Pay to obtain the specific bill pay Cookie needed.

7. **Repeat Step 5** and choose the original Block Cookies setting (that was originally selected) now that the bill pay cookie has been obtained. To close the window, select the **red dot** in the top left corner of the window.

ProfitStars®