

How to register for Internet Banking

New Internet Banking Users



Welcome to the Internet Banking Registration Guide

This guide will show you step by step how to sign up and start using your new Internet Banking.

To ensure you can register and log in to the new Internet Banking, please have the following to hand:

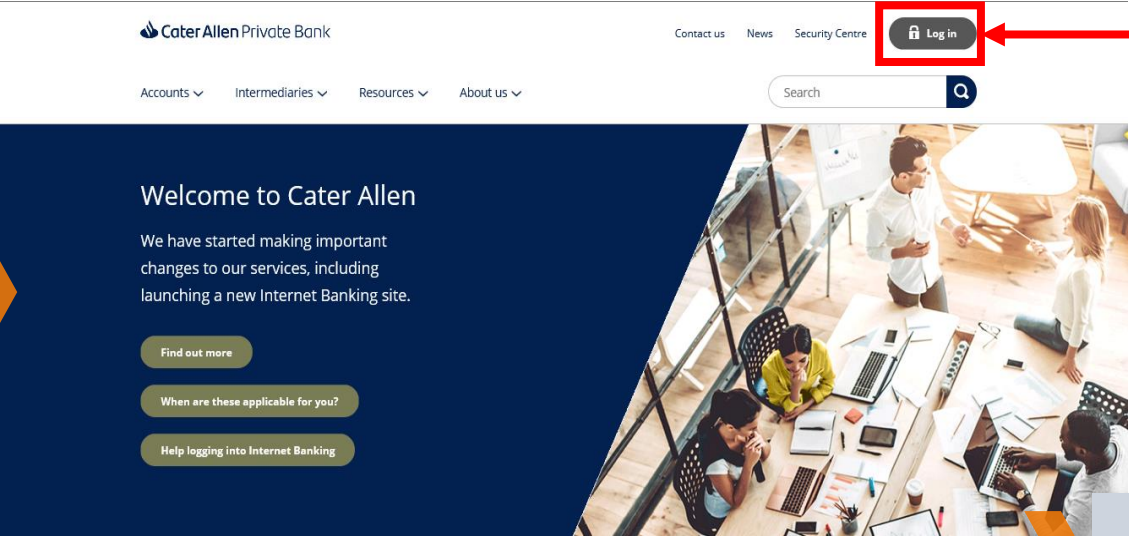
- 1. Customer ID** – You would have received two welcome letters from us after account opening. Your Customer ID is provided on the second welcome letter.
- 2. Account Number** – You can find this on the first welcome letter you would have received from us. You can also find your account number on your statements and your cheque books.
- 3. Your mobile phone** (the number you provided for your account) as this will be used for **One Time Passcode (OTP) verification**.



If you have any trouble following this guide, please visit the FAQs section on [caterallen.co.uk](https://www.caterallen.co.uk) or speak to a member of our team.

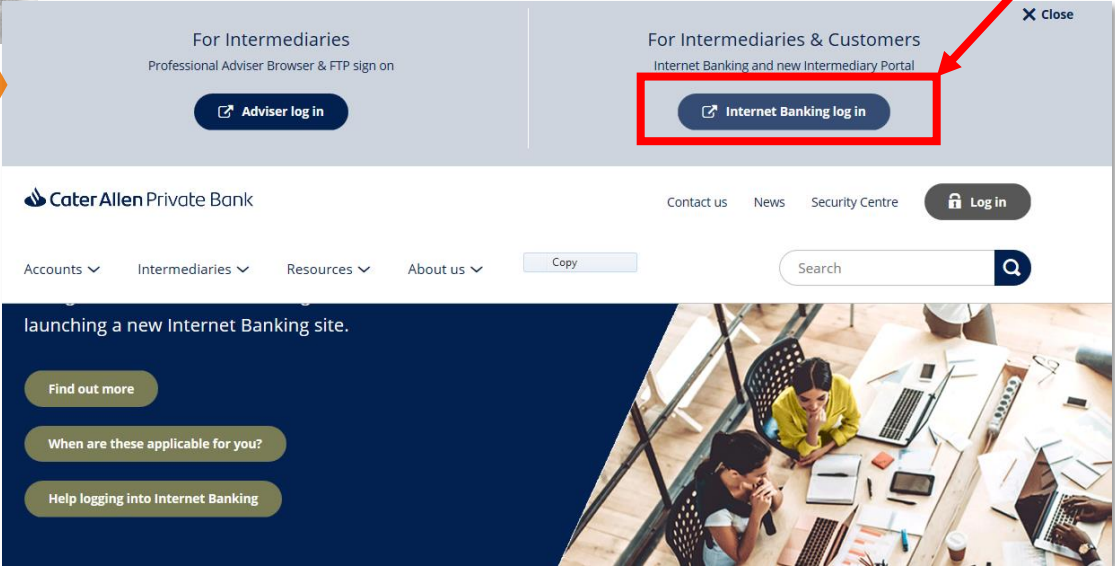
Go to the Cater Allen website to access the Internet Banking log in page.

Go to caterallen.co.uk



1. On the Cater Allen homepage, click here

2. Click here



Step 1. On the Internet Banking page, start by entering your Customer ID.

Cater Allen
Private Bank

Welcome to Cater Allen Internet Banking

Identify yourself

Enter your Username or your Customer ID.

USERNAME75

Continue

Forgotten your details?
Please call our Client Service Centre on **0800 092 3300** for assistance.
For our Client Service Centre hours and further contact details please see www.caterallen.co.uk/contact-us
International number +44(0)114 228 2407. Calls will be charged at your usual International rate.

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fscs
Protected

1. Enter your Customer ID

Then click "Continue"



Step 1. You will be directed to the Internet Banking registration page. Re-enter your Customer ID and also enter your Account Number here.

Cater Allen
Private Bank

Register for Internet Banking

Identify Yourself

1 2 3 4

Enter your Customer ID and Account number
Fields marked with * are mandatory

Customer ID *

Account number *

Please confirm you have read the [terms and conditions](#) before proceeding

Back Continue

1. Please re-enter your Customer ID here

2. Please enter your Account Number here

3. Please click on the check box to confirm you have read the Terms and Conditions before proceeding

4. Click here to continue

Step 2. You will be sent an OTP message so that we can confirm it's really you.

Cater Allen
Private Bank

Register for Internet Banking

Confirming your identity

1 2 3 4

Enter the One Time Passcode (OTP) we've just sent to your registered mobile 78****6335
If the registered number shown is not correct, please call us on 0800 092 3300

Fields marked with * are mandatory

OTP *
..... I

Resend OTP (49)

Back Continue

1. Please have your registered mobile phone to hand

You will be sent an OTP to this mobile phone, you **must enter the OTP** into this box

2. Click here to continue



Step 3. You must now set up your Username, Password and Personal Access Code (PAC) which will become your Internet Banking log in details.

Welcome to Cater Allen Internet Banking

Create Profile



Create your new access details

Fields marked with * are mandatory

Username *

Password *

Confirm Password *

PAC *

1. Please create your Username, Password and PAC

2. Click here to continue

Ensure you meet **all the requirements to create your new profile**

Your Username must:

- Be between 5 – 26 characters in length
- Contain a minimum of 5 alphabetic characters
- Not include spaces or special characters
- Not include a sequence of 5 or more characters that appear in your Internet Banking Password

Your Password must:

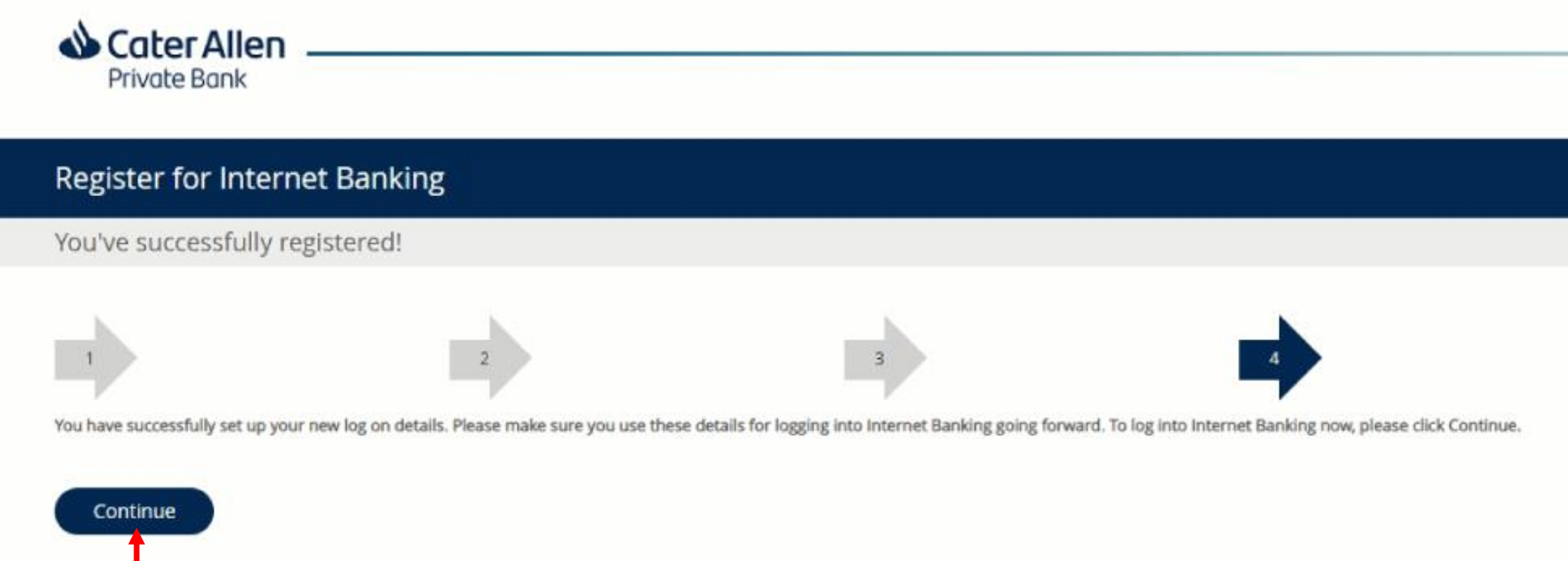
- Be between 8 and 20 characters in length
- Not be the same as your Username
- Contain Uppercase, Lowercase, Numeric characters and at least one of the following special characters: ~!@#\$\$%^&*()_{}:~?<>
- Not contain your first, middle or last names

Your PAC must:

- Be a 6 digit number
- Not be your date of birth
- Not include consecutive numbers e.g. 123456
- Not include repeated numbers e.g. 111234



Step 4. You have successfully registered for Internet Banking.



The screenshot shows the Cater Allen Private Bank interface. At the top left is the logo with the text "Cater Allen Private Bank". Below it is a dark blue header with the text "Register for Internet Banking". Underneath the header is a light grey banner that says "You've successfully registered!". Below the banner is a progress indicator consisting of four arrows. The first three arrows are grey and labeled "1", "2", and "3". The fourth arrow is dark blue and labeled "4". Below the progress indicator is a paragraph of text: "You have successfully set up your new log on details. Please make sure you use these details for logging into Internet Banking going forward. To log into Internet Banking now, please click Continue." Below this text is a dark blue button with the word "Continue" in white. A red arrow points from the "Continue" button down to a red-bordered box at the bottom of the page.

Now that you have set up your log in details, you **need to log in** to access Internet Banking

Step 5. To log in enter your Customer ID or the Username you created during the registration process.



Welcome to Cater Allen Internet Banking

Identify yourself

Enter your Username or Customer ID

Remember Me

Continue

Forgotten your Username?
Forgotten your PAC?
Forgotten your Password?
Forgotten your details or unable to log in?

1. Please enter your newly created Username or your Customer ID

2. Click here to continue



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Protected

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Step 5. Enter your PAC and Password.



Welcome to Cater Allen Internet Banking

Verify yourself

Enter the 1st, 5th and 6th characters of your Personal Access Code

Enter your Password

Back

Continue

Forgotten your PAC?
Forgotten your Password?
Forgotten your details or unable to log in?

Important Fraud Information

Never share a Cater Allen Private Bank One Time Passcode (OTP) with another person. Not even a Cater Allen Private Bank employee.

Never download software or let anyone remotely log on to your computer or devices, either during or after a cold call.

Never enter your Internet Banking details after clicking on a link in an email or text message.

Never transfer or withdraw money out of your account if you're instructed to do so for security reasons.

Never set up new or change existing payment details without first verifying the request directly with the person or company you're paying, preferably using existing contact details.

[Click here for more information on how to protect yourself from fraud and scams.](#)

Security Software

Install Trusteer Rapport. This free software can help protect you when you're using Internet Banking.

Received a suspicious email?

If you get an email that's branded Cater Allen Private Bank but doesn't contain your name, do not reply, open any attachment or click on any link. Forward the email to phishing@caterallen.co.uk for us to investigate.

1. Enter the 3 digits requested from your newly created PAC

2. Enter your newly created Password

3. Click here to continue



Step 6. You have now successfully logged into Internet Banking.

The screenshot displays the Cater Allen Private Bank internet banking interface. At the top left is the bank's logo and name. Below it, a user profile section shows a placeholder for a customer ID. On the right, there is a 'Log off' button. A navigation bar contains links for 'My accounts', 'Payment services', and 'Term deposits', along with 'My details', 'Mailbox', 'Authorisation', and 'Contact us'. A left-hand menu lists various account services. The main content area shows a 'Personal accounts' section with a card for a 'Private Bank Account' displaying an available balance of £ 14.95 and a credit interest rate of 0.25%.

Account services

- My accounts
- Last 30 days transactions
- Transaction list
- Account details
- Account statement
- Statement preferences
- Service request tracker
- Access management
- Account closure
- Cheque book request
- Enquire cheque status
- Cancel a cheque

Personal accounts

Private Bank Account	£ 14.95 AVAILABLE BALANCE
Credit interest rate 0.25%	

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Once successfully logged in, you will be able to access your account(s).

Thank you

 Cater Allen Private Bank