

How to register for our new Internet Banking

Existing Internet Banking Users



Welcome to the Internet Banking Registration Guide

If you have been upgraded to our new Internet Banking site, you will need to re-register and update your log in details on first time log in. This guide gives you a step by step guide on how to log in for the first time.

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

- 1. Your usual Internet Banking log in details** – This is your Customer ID or Username, your PAC and password. If you have forgotten your log on details, please call us.
- 2. Account Number** – You can find your account number on your statements and your cheque books.
- 3. Your mobile phone** which you have registered for Internet Banking. We will send you a **One Time Passcode (OTP) on this number**. If you haven't previously registered a mobile number, we may try to send you an OTP on another personal mobile number we hold for you.

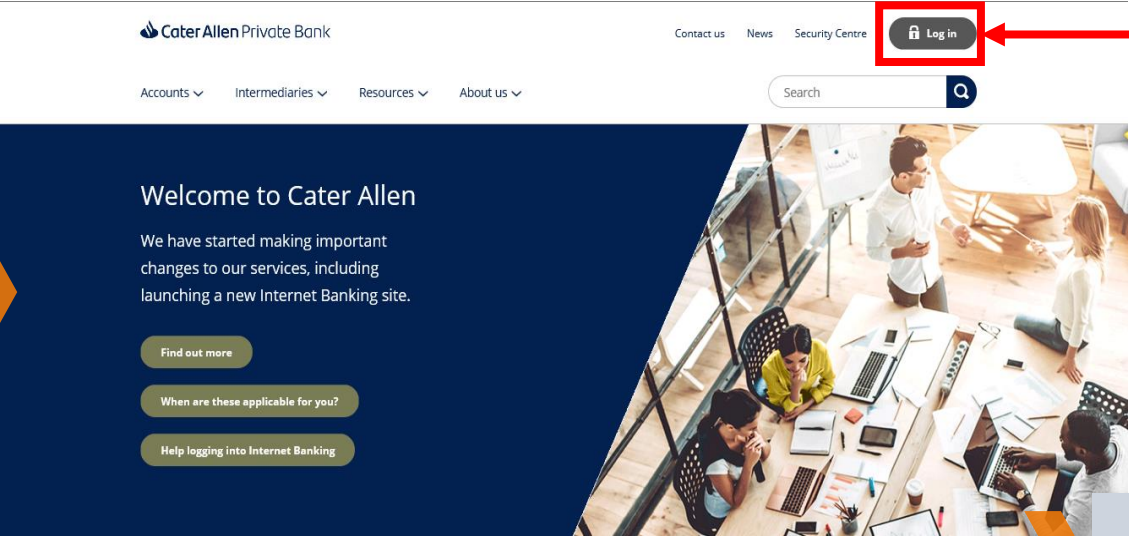
Please call us if you have never registered a personal mobile number with us, before you begin this registration process.



If you have any trouble following this guide, please visit the FAQs section on caterallen.co.uk or speak to a member of our team.

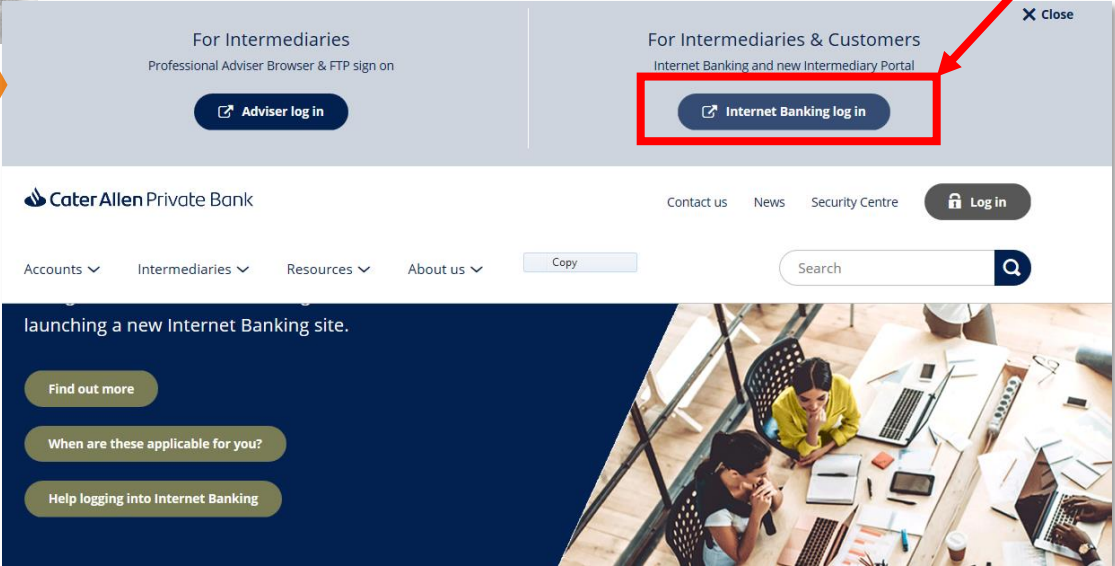
Go to the Cater Allen website to access the Internet Banking log in page.

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 or Username.

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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Protected

1. Enter your Customer ID or Username
Then click "Continue"



Step 4. You will be directed to the Internet Banking registration page. 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 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 5. 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 6. You must now reset your Username, Password and Personal Access Code (PAC), which will become your new Internet Banking log in details.



Welcome to Cater Allen Internet Banking

Create Profile



For enhanced security we recommend creating new access details. However, if you prefer you can reuse your existing Username and PAC but must create a new Password.



Create your new access details

Fields marked with * are mandatory

Username *

Password *

Confirm Password *

PAC *

1. Please create your Username, Password and PAC

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

You can reuse your existing Username if you prefer

Please set up a new 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

You can reuse your existing PAC if you prefer

Back

Continue

2. Click here to continue



Step 7. You have successfully registered for the new Internet Banking site.

The screenshot shows the Cater Allen Private Bank logo at the top left. Below it is a dark blue header with the text "Register for Internet Banking". Underneath the header is a light grey bar with the text "You've successfully registered!". Below this is a progress indicator consisting of four arrows pointing right. 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 the 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." At the bottom left of the page is a dark blue button with the text "Continue". A red arrow points from the "Continue" button down to a red-bordered box at the bottom of the page.

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



Step 8. 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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Step 9. 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 10 – Successful Log in.

The screenshot displays the Cater Allen Private Bank customer portal. At the top left is the logo and name 'Cater Allen Private Bank'. Below it is a user profile section with a circular icon and the text 'Your Customer ID: [redacted]'. To the right of the profile is a 'Log off' button. A navigation bar contains links for 'My accounts', 'Payment services', and 'Term deposits'. On the right side of the navigation bar are links for 'My details', 'Mailbox' (with a notification icon), 'Authorisation' (with a notification icon), and 'Contact us'. The main content area is titled 'Personal accounts' and features a card for a 'Private Bank Account'. The card shows a credit interest rate of 0.25% and an available balance of £ 14.95. A left-hand sidebar lists various account services such as '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', and 'Cancel a cheque'. At the bottom left, there are links for 'Terms & conditions' and 'Privacy policy'. At the bottom right, the copyright notice reads '© 2020 Cater Allen Private Bank | All rights reserved'.

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

Thank you

 Cater Allen Private Bank