



WACHOVIA

A Wells Fargo Company

*Wachovia Connection
First Time User Registration
Training Guide*

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How to Access Wachovia Connection

1. Login to Wachovia Connection by typing the web address <http://www.wachovia.com>
2. Under Corporate and Institutional select the **Wachovia Global Connect & Corporate Login** link located to the right



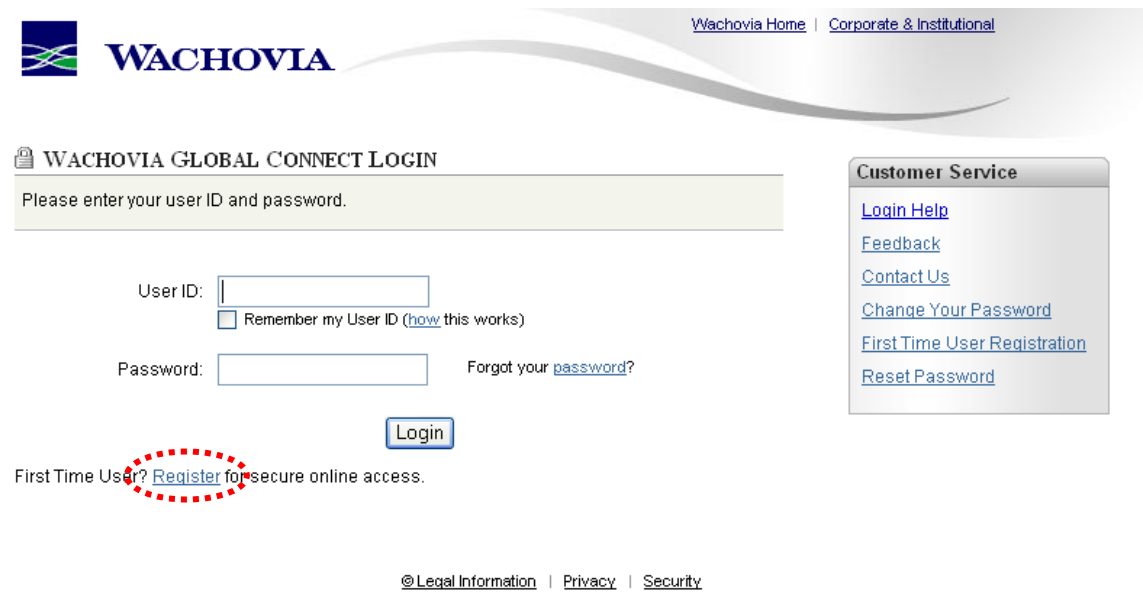
3. From the Wachovia Global Connect Corporate Product Menu click on **Login** to access your account. Be sure to bookmark the Login page or add it to your favorites for accessing Wachovia Connection in the future.

First Time User Registration Process

There are two options to begin the First Time User Registration:

- **Option 1** - Select the **Register** link on the Wachovia Global Connect login screen
- **Option 2** - Cut and paste the First Time User Registration link from the Wachovia Connection Welcome e-mail.

Option 1: Wachovia Global Connect Login screen



1. Click on the **Register** link at the bottom beside First Time User?

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USER IDENTIFICATION

Your one-time registration information required to complete the next page has been communicated to you in a separate email.
Please enter your User ID.

User ID:

[User ID Requirements](#)

Continue Cancel

Customer Service

[Help](#)
[Contact Us](#)

[Legal Information](#) | [Privacy](#) | [Security](#)

- In the **User ID** field, enter the User ID provided in the Wachovia Connection Welcome e-mail
- Click **Continue**

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FIRST TIME USER ENROLLMENT: STEP 2

Please reference the email sent to you separately containing your One-Time PIN and your Pass Phrase.

User ID: demotrain1

One-Time PIN:

Pass Phrase:

Continue Cancel

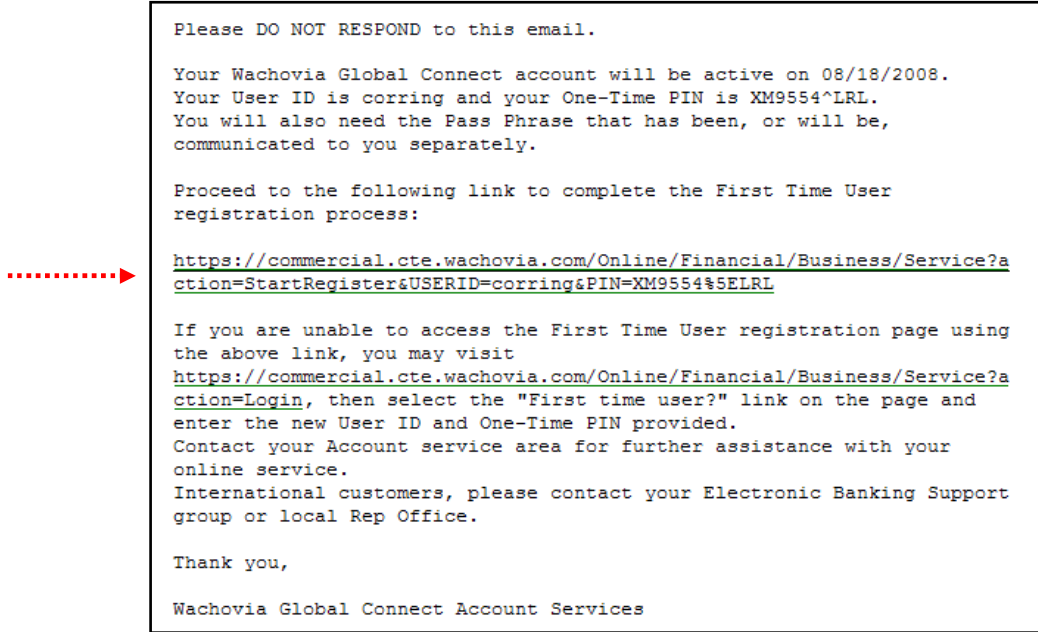
Customer Service

[Help](#)
[Contact Us](#)

[Legal Information](#) | [Privacy](#) | [Security](#)

- In the **One-Time PIN** field, enter the one-time PIN provided in the Wachovia Connection Welcome e-mail
Note: One-Time PIN contains letters, numbers, and special characters.
- In the **Pass Phrase** field, enter the pass phrase provided to you by your Security Administrator
Note: Pass Phrase is at least 8 characters and contains letters and numbers.
- Click **Continue**

Proceed to page 6 to continue with the First Time User Registration process

Option 2: Wachovia Connection Welcome e-mail First Time User Registration link

1. Copy and paste the **First Time User Registration** link located within the Wachovia Connection Welcome e-mail into your Internet browser

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FIRST TIME USER ENROLLMENT: STEP 2

Your Pass Phrase was communicated to you separately via phone or email.

User ID: demotrain1

One-Time PIN:

Pass Phrase:

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Note: The User ID and One-Time PIN will be pre-filled by using that link

2. In the **Pass Phrase** field, enter the Pass Phrase provided to you by your Security Administrator
Note: Pass Phrase is at least 8 characters, contains letters and numbers and it's case sensitive.
3. Click on **Continue**

Proceed to page 6 to continue with the First Time User Registration process

Security Information

On the Security Information screen, you will be prompted to create a new password, confirm primary email address, and establish answers to 4 of 15 security questions.

SECURITY INFORMATION

We have enhanced our online security features to protect your privacy and financial information.

Please provide a unique email address so you can receive security notifications about your online services. You can maintain your email address by logging into Wachovia Global Connect and accessing Manage My in the Primary Email Address section. In addition to your email, you will need to update your security questions and answers to benefit from our enhanced online security.

* Indicates required field

Your User ID is: **userid**

* Establish a New Password: [password field] [Password Requirements](#)

* Confirm New Password: [password field]

* Primary Email Address: [email@company.com] [Email Requirements](#)

* Confirm Primary Email Address: [email@company.com]

Security Questions [Security Question / Answer Requirements](#)

Please select **four** security questions from the list below and enter an answer in the corresponding answers field. To change an answer, delete an existing answer and type a new one. To modify your selections, you must unselect a question before selecting a new question.

What is your favorite movie?
*Answer: [password field] [Show Text](#)

What is your favorite book?
*Answer: [password field] [Show Text](#)

Who is your favorite fictional character?

Where is your ideal vacation location?
*Answer: [password field] [Show Text](#)

Who is your all time favorite entertainer?

What job did you dream of having as a child?

What was your favorite toy as a child?

Which historical figure would you most like to meet?

Who is your favorite cartoon character?

What is your favorite song?
*Answer: paradise city [Hide Text](#)

What was the name of your favorite teacher?

What was your favorite subject at school, college or University?

Which non-immediate family member was your hero as a child?

From all history, who would you most like to have as a mentor?

What was your first job?

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1. In the **Establish a New Password** field, enter your new password
 - a. Click on **Password Requirements** to review acceptable password requirements including characters and length
2. In the **Confirm New Password** field, enter your new password again
3. In the **Primary Email Address** field, enter your primary email address
4. In the **Confirm Primary Email Address** field, confirm the primary email address
5. In the **Security Questions** section, select the box next to 4 of the 15 questions that you want to answer
 - a. Click on the **Security Question/Answer Requirements** link to assist you with the security requirements of the questions and answers
 - b. Click on the **Hide Text** button to encrypt your answers as you enter them.
6. Click **Submit** to submit the security information

Secondary Authentication

Secondary Authentication is an extra layer of security designated at the company level to help protect your company from fraudulent activity. Wachovia Connection offers two secondary authentication device types. Please verify with your Security Administrator which of the following options below applies to you.

Digital Certificate – Digital Certificates are electronic credentials stored on your PC that ensure the actual PC accessing Wachovia Connection is in fact an authorized PC. The Digital Certificate is specific to the User Id and PC; therefore a certificate will need to be downloaded to any PC used to access Wachovia Connection. (See below for Digital Certificate download instructions)

Token – Tokens are small portable devices that generate a Personal Identification Number (PIN) and give a user the mobility to access Wachovia Connection from any PC. (See page 11 for Token instructions)

Note: Both options (Digital Certificate and Token) can also be selected as the company's Secondary Authentication method. (See page 12 for Digital Certificate and Token Instructions)

Digital Certificate

If your company has designated digital certificates as the Secondary Authentication method, then you will automatically be prompted to download the certificate to your pc during the First Time User Registration process and if Wachovia Connection is accessed from another pc.

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SUBSCRIBER AGREEMENT FOR DIGITAL ID CERTIFICATES

Customer Service
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NOTE:
READ THIS WACHOVIA ENCRYPTION TECHNOLOGIES ("WachoviaET") SUBSCRIBER AGREEMENT FOR DIGITAL ID CERTIFICATES ("SUBSCRIBER AGREEMENT") CAREFULLY BEFORE APPLYING FOR, ACCEPTING, OR ISSUING A WACHOVIA DIGITAL ID CERTIFICATE. WACHOVIAET IS WILLING TO ISSUE YOU A CERTIFICATE ONLY ON THE CONDITION THAT YOU ACCEPT ALL OF THE TERMS CONTAINED IN THIS SUBSCRIBER AGREEMENT. BY CLICKING "ACCEPT" BELOW, YOU ACCEPT AND AGREE TO BE BOUND BY THE TERMS OF THIS SUBSCRIBER AGREEMENT. IF YOU DO NOT AGREE TO THE TERMS OF THIS SUBSCRIBER AGREEMENT, DO NOT APPLY FOR, ACCEPT, OR USE SUCH CERTIFICATE.

By submitting the Certificate application attached to this Subscriber Agreement, you, (and if you are submitting such application as an employee of a company under contract with Wachovia, you as an employee of such company ("you")), request that WachoviaET issue you a Certificate that identifies you ("Your Certificate") for your use in certain communications with Wachovia Corporation, its subsidiaries, and affiliates.

Your Certificate and your use of Your Certificate are governed by the Certification Practice Statement ("CPS"), as amended from time to time, which is incorporated by reference into this Subscriber Agreement. The CPS is published on the Wachovia Internet web site at http://www.wachovia.com/in/idelegal_fused01_2181_3016.00.html and is available via E-mail from legalaffairs@wachovia.com. In addition, the CPS is governed by the WachoviaET Certificate Policy ("CP"), as amended from time to time, which is incorporated by reference into this Subscriber Agreement. The CP is published on the Wachovia Internet web site at http://www.wachovia.com/in/idelegal_fused01_2181_3016.00.html and is available via E-mail from legalaffairs@wachovia.com. Capitalized terms used in this Subscriber Agreement that are not defined herein shall have the meanings set forth in the CP and the CPS.

You agree to use Your Certificate only in accordance with the CPS and the CP, and you agree to comply with all obligations imposed on Subscribers and Applicants under the CP and the CPS. In addition, when you are functioning as a Relying Party you agree to comply with all obligations imposed on Relying Parties under the CP and the CPS. THE WACHOVIAET DISCLAIMS ALL WARRANTIES, INCLUDING WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, LIMITS LIABILITY, AND EXCLUDES ALL LIABILITY FOR INCIDENTAL, CONSEQUENTIAL, AND PUNITIVE DAMAGES AS STATED IN THE CP AND THE CPS. SEE THE CP AND THE CPS FOR IMPORTANT DETAILS.

You further agree that: (1) Your Certificate will be used only for authorized and legal purposes consistent with the CP, the CPS, this Subscriber Agreement, and applicable laws and regulations; (2) any other use of Your Certificate is not authorized, must be reported immediately to WachoviaET via E-mail at legalaffairs@wachovia.com; (3) you will retain control of and protect the Private Key corresponding to the Public Key listed in Your Certificate, and prevent its disclosure; (4) all representations made by you during the Registration Process, and all information contained in Your Certificate are complete and accurate; (5) The WachoviaET has your permission to publish Your Certificate in the repository; (6) you agree that the WachoviaET has the authority to revoke Your Certificate as set forth in the CP and the CPS; and (7) you will immediately notify the RA that administered the Registration Process or the WachoviaET via E-mail at ra@issueregistration@wachovia.com, upon discovery of any event that may invalidate or otherwise diminish the integrity of Your Certificate, such as known or suspected loss, disclosure or other compromise of your Private Key, or actual or suspected misuse, loss, or theft of Your Certificate.

You represent and warrant that all of the information that you have provided in the Certificate application you are submitting is accurate and complete to the best of your knowledge and belief, and that you have not, in any way, misrepresented your identity or misappropriated the identity, trade name or trademark of any third party.

You will indemnify and hold harmless WachoviaET, its directors, officers, employees, agents, subsidiaries, parents and affiliates, against any and all liability, losses, claims, demands, disputes, damages or costs of any kind, including, without limitation, reasonable attorneys' fees and costs of litigation, collectively, "Losses and Liabilities" resulting from or connected with: (a) your breach of any representations and warranties and any of your obligations set forth in the CP, the CPS, or this Subscriber Agreement; (b) any misappropriation of your identity arising out of any misleading information provided to you; (c) the use of any name or materials in Your Certificate that infringe upon third party intellectual property rights that arises out of any misleading information provided by you; (d) any use of your Private Keys other than as expressly set forth in the CP, the CPS, or any other applicable documents; and (e) any unreasonable repudiation by you of Your Certificate after same has been validated by the WachoviaET.

You also agree to indemnify the WachoviaET for any losses or damages arising as a result of Your Certificate containing a trademark or other name provided by you that infringes or violates the proprietary rights of a third party.

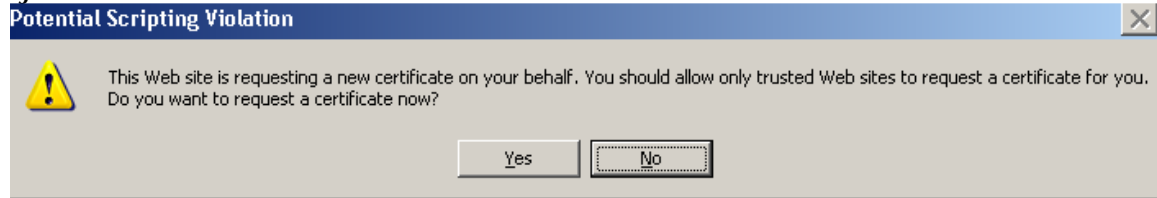
I Agree Cancel

End the Subscriber Agreement

1. From the **Subscriber Agreement for Digital ID Certificates** screen, read through the agreement
2. Click **I Agree** at the bottom to continue with the registration process

Note: Depending on your version of Internet Explorer and operating system, you will be presented with a different window to allow/grant the download of the Digital Certificate.

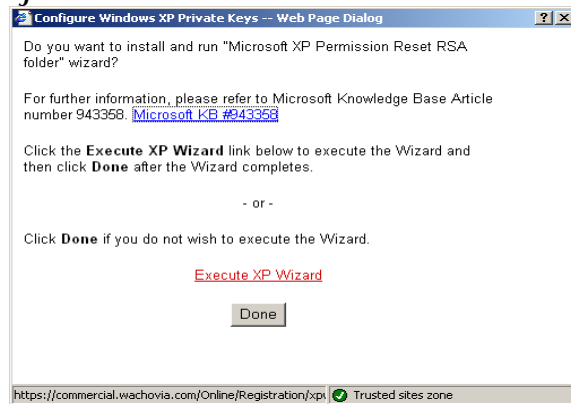
If Windows 2000:



- a. Click **Yes** to request a certificate

Proceed to step 3 on page 9

If Windows XP:



- a. Click on the **Execute XP Wizard** link
 - i. Click **Run** - if user has Administrative rights for network id
 - ii. Click **Save** - if user does not have Administrative rights for network id. Please contact your IT department to follow steps below:
 1. Save file to desktop – enter file name – click **Save**
 2. Click **Open Folder** to access the file
 3. Right click on the executable icon and click **Run As**
 4. Select the radio button beside **The following User**
 5. Select the network administrator **User Name** and enter the **Password** for the Administrator
 6. Click on **Ok** and then click **Run**
 7. Click **Next** for the next 3 screens
 8. Click on **Install**
 9. Click on **Finish**
- b. Click on **Done**

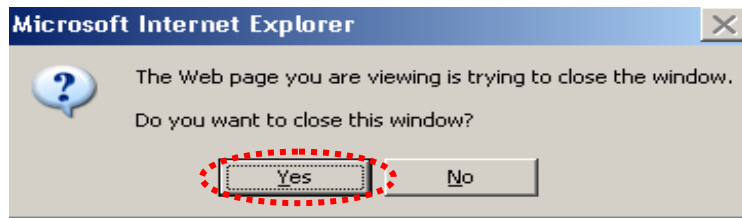
Proceed to step 3 on page 9

If Windows Vista:

Please contact Technical Consulting Services - 1800-521-5006

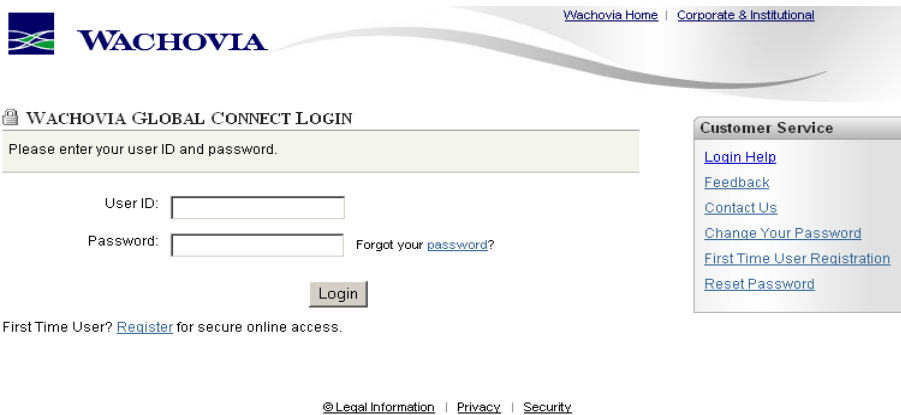


3. Click **Close Window** upon receiving confirmation of a successful download



4. Click **Yes** to close the internet explorer browser

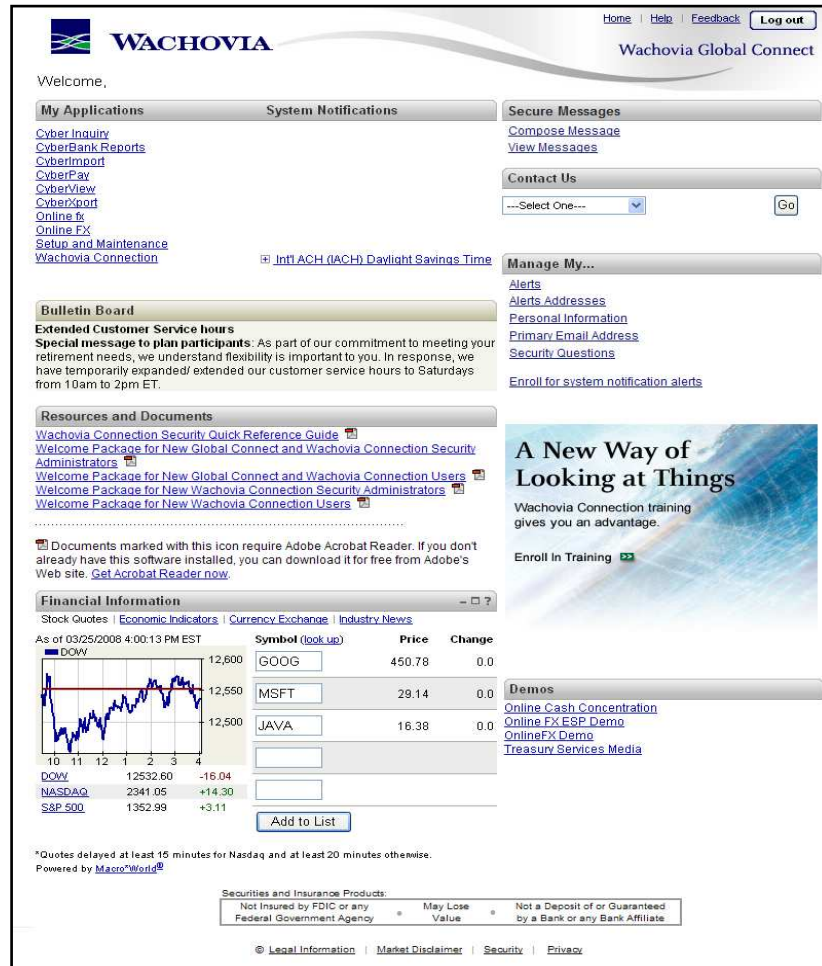
5. Open a new internet explorer browser window to access Wachovia Connection. Follow the steps from the **How to Access Wachovia Connection** section starting on page 3



6. In the **User ID** field, enter your User ID

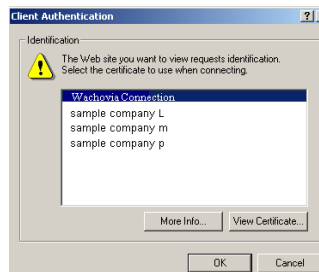
7. In the **Password** field, enter your password

8. Click **Login**



9. Click on the **Wachovia Connection** link under My Applications

Note: If you have multiple Digital Certificates downloaded to your PC, you will be asked to select the appropriate digital certificate for your User ID. Otherwise, no action is required at future Wachovia Connection logins.



- a. Select the **Digital Certificate** associated with your Wachovia Connection User ID. If you are not sure which one is correct, highlight the certificate and click **View Certificate**. The date you downloaded the certificate will be displayed
- b. Click **OK**

You are now inside of the Wachovia Connection application

Token

If your company has designated Tokens as the Secondary Authentication method, then you will automatically be prompted with the Secondary Security Entry screen to assign the token to your user id.

1. Click on the **Enter Serial Number** link
2. Enter the **Serial Number** located on the back of the token in the space provided. (Enter the 8 digit number without the dash)
3. Click on **Continue**
4. Answer 2 of the 4 Security Questions answered on page 6
5. Click **Continue**
6. Depress the button on the front of the Token to obtain your 6 digit **PIN** (Personal Identification Number)
7. In the **Token Security Code** field, enter the PIN that is displayed on your Token

Note: You will only have thirty seconds to enter the PIN. If you exceed the thirty second window, depress the button again to generate a new PIN

8. Click **Submit**

Note: Depending on the preference of the Security Administrator, You will either be prompted for your token security code at future Wachovia Connection logins or only at certain functions within Wachovia Connection

You are now inside of the Wachovia Connection application

Both Digital Certificate and Token

If your company has designated both Digital Certificate and Token as the Secondary Authentication methods, you will need to go through setting up both the digital certificate as well as the token.

1. Download the Digital Certificate. Follow steps 1 – 9 from the **Digital Certificate** section starting on page 7

2. Assign the Token to your user id.
 - a. Click on the **Enter Serial Number** link
 - b. Enter the **Serial Number** located on the back of the token in the space provided
 - c. Click on **Continue**
 - d. Answer the User Authentication question selected from the Security Assignment step on page 6
 - e. Click **Continue**

Note: Now that the Digital Certificate has been downloaded and the Token has been assigned to your user id, proceed to step 3 to access the Wachovia Connection application

3. Select the radio button beside the Secondary Authentication method that you would like to use to access the Wachovia Connection application

Note: For future logins, you will be prompted with the screen above to select your secondary authentication method to access Wachovia Connection application

You are now inside of the Wachovia Connection application

Support & Resources

Contacts:

Technical Consulting Services: Sunday, 12 a.m. to Saturday, 12 a.m. ET

Supports calls from Wachovia Connection clients around navigation, security and access for application; provides troubleshooting and technical support.

800-521-5006, option 3

Wachoviaconnection@wachovia.com

Domestic Funds Transfer:

For initiating outgoing wires by phone, inquiring on existing wires or to investigate a wire transfer, please call the number that corresponds to the state the originating account is held.

NC, NY, PA, CT, DE – 800-735-3320

SC, VA, MD, DC, FL, GA, TX, MS, AL, TN – 800-669-4458

International Funds Transfer:

For initiating outgoing international wires, investigating incoming transfers or drafts, inquire on international wires or International ACH and the status of an international investigation.

Funds Transfer Customer Care – 800-522-4045 or 866-815-5747

Account Recon:

For inquiring on exception items and your account reconciliation profile.

803-933-2611 or 800-222-3862

Commercial Loans:

For assistance with your commercial loan, please contact your Loan Officer.

Corporate Customer Service:

For general assistance with your accounts.

800-222-3862 option 795

ACH customer Service:

For assistance with ACH reversals, cancels, investigations, and verifying funds received.

704-590-0500 or 800-841-8893

Training:

Wachovia offers comprehensive training options to help educate you about Wachovia Connection. **Instructor Led** sessions allow participants to attend a virtual classroom with an instructor as he/she navigates through the functions and features of the application. **Video** are also available for review as it fits your schedule. To register for additional Training Sessions wachovia.com/treasuryeducation

Treasury Management Sales Consultant (TMSC)/Wachovia Bank Contact:

Your TMSC or other Wachovia contact can assist with changes to your Wachovia Connection service and/or provide information on other Treasury Management solutions.