



# USING YOUR SMARTCARD TO SWITCH TO YOUR NEW ONLINE SERVICE

YOUR STEP-BY-STEP GUIDE

*Coutts*

# WE'RE UPGRADING YOUR ONLINE SERVICE

From 9am on 8 April 2024 your online services will be upgraded.

You can use your existing smartcard and reader to access the new digital service. You just need to complete four steps.

This booklet provide a step-by-step guide to support you through your switch.

## **Getting started**

Follow the step-by-step guidance in this booklet

## **What you will need**

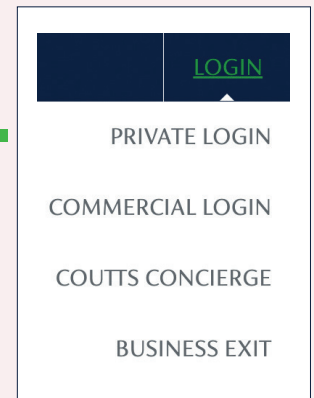
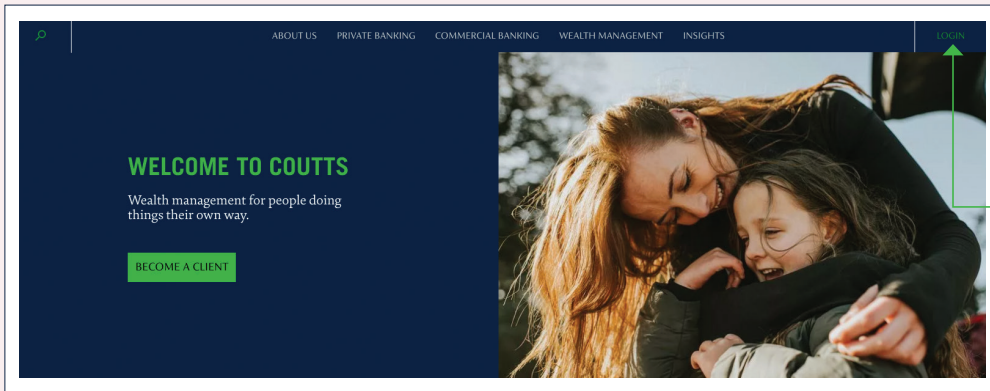
- Your current Username
- Your existing smartcard and reader

# STEP-BY-STEP GUIDE

## Step 1

To get started you'll need to visit **coutts.com** ■

Then select **LOGIN**,  
followed by **PRIVATE LOGIN**



# STEP-BY-STEP GUIDE

## Step 2

The screenshot shows the Coutts website's login options page. At the top is the Coutts logo and a navigation bar with links: ABOUT US, PRIVATE BANKING, WEALTH MANAGEMENT, ONLINE INVESTING, and INSIGHTS. The main heading is "WHICH LOGIN OPTION SHOULD I CHOOSE?". Below this is a sub-heading: "This will depend on the type of account(s) you access via digital banking and the features you use. Please select from the options below." There are two radio button options: "NEW DIGITAL SERVICE" (which is selected) and "EXISTING DIGITAL SERVICE". Below the "NEW DIGITAL SERVICE" option, there is explanatory text: "Most Coutts private clients should use this option. Remember you'll first need to register for this service by downloading the Coutts app. Once you log in via this option, you'll be directed to our upgraded digital service." At the bottom, there is a green button labeled "LOGIN TO OUR NEW DIGITAL SERVICE".

**WHICH LOGIN OPTION SHOULD I CHOOSE?**

This will depend on the type of account(s) you access via digital banking and the features you use.  
Please select from the options below.

☒ NEW DIGITAL SERVICE    ☐ EXISTING DIGITAL SERVICE

Most Coutts private clients should use this option. Remember you'll first need to register for this service by downloading the Coutts app.  
Once you log in via this option, you'll be directed to our upgraded digital service.

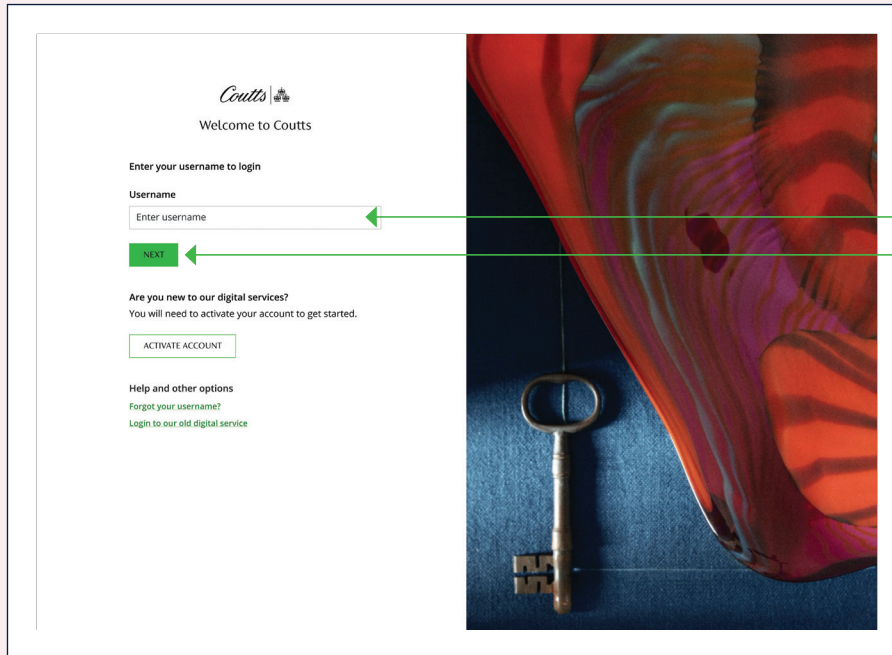
**LOGIN TO OUR NEW DIGITAL SERVICE**

■ You will then need to make sure you select **NEW DIGITAL SERVICE**

■ Then select **LOGIN TO OUR NEW DIGITAL SERVICE**

# STEP-BY-STEP GUIDE

## Step 3



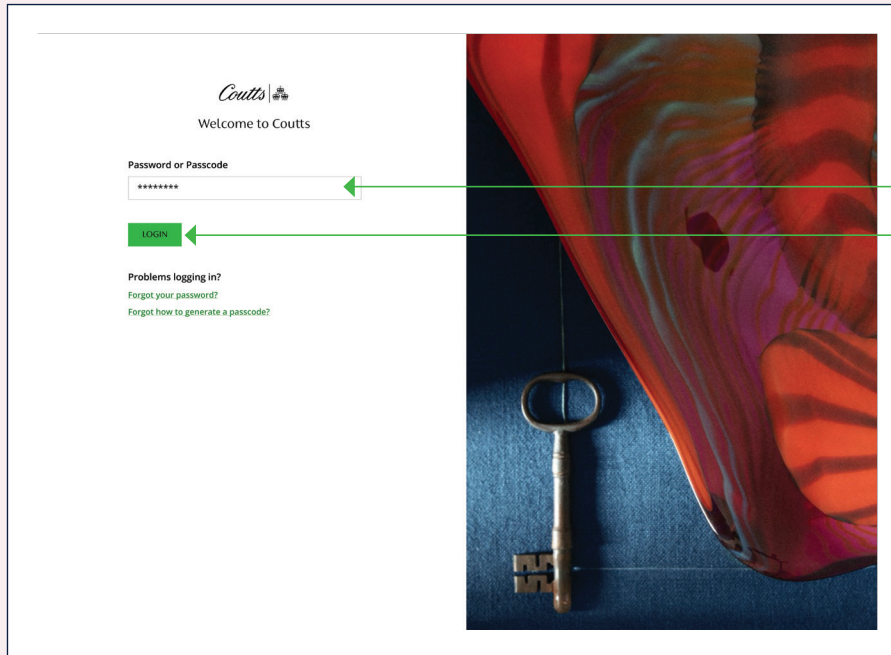
The screenshot shows the Coutts login interface. On the left, the Coutts logo and 'Welcome to Coutts' are at the top. Below is the section 'Enter your username to login' with a 'Username' label and a text input field containing 'Enter username'. A green arrow points from the 'enter your Username' instruction to this input field. Below the input field is a green 'NEXT' button with a left-pointing arrow. A second green arrow points from the 'Then select NEXT' instruction to this button. Further down is the section 'Are you new to our digital services?' with the text 'You will need to activate your account to get started.' and an 'ACTIVATE ACCOUNT' button. At the bottom are links for 'Help and other options', 'Forgot your username?', and 'Login to our old digital service'. On the right side of the login form is a large, artistic image of a red and orange draped fabric with a silver key resting on a blue surface below it.

You will then  
■ enter your Username

■ Then select NEXT

# STEP-BY-STEP GUIDE

## Step 4



The screenshot shows the Coutts login interface. On the left, the Coutts logo and 'Welcome to Coutts' are at the top. Below is a 'Password or Passcode' field with a masked password '\*\*\*\*\*'. A green arrow points from the text 'You will then need to generate and enter your Passcode, using your existing smartcard and reader' to this field. Below the field is a green 'LOGIN' button with a left-pointing arrow. A second green arrow points from the text 'Then select LOGIN' to this button. At the bottom left are links for 'Problems logging in?', 'Forgot your password?', and 'Forgot how to generate a passcode?'. On the right, a vertical image shows a red and orange patterned smartcard with a silver key resting on a blue surface.

You will then need to generate and enter your Passcode, using your existing smartcard and reader

Then select **LOGIN**

**You are now set up and ready to enjoy your new digital services**

If you need some support to get online, our team are here and ready to help.



Speak to a specialist on the Coutts Digital Helpdesk on +44(0) 207 770 0000 who can guide you through the steps you need to take to get online.

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Visit the 'Activation Hub' in our Head Office at 440 Strand for face-to-face support.  
The Activation Hub is available from 8 to 19 April 2024, Monday to Friday, 9.30am to 4pm.

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If you have any special requirements or would like some more support, you can arrange for one of our team to call you on a day that suits you. Simply visit **[coutts.com/digital/getready](https://coutts.com/digital/getready)** and complete the call back request form.

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For more useful information including answers to some common questions, go to **[coutts.com/digital/getready](https://coutts.com/digital/getready)**

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Once you have activated your online accounts, you can choose to download the Coutts App as well.

The App you need is 'Coutts' with the Blue background (as seen below) The QR code below will take you directly to the correct version.



Download the Coutts mobile App from the Apple App Store



Download the Coutts mobile App from the Google Play Store



