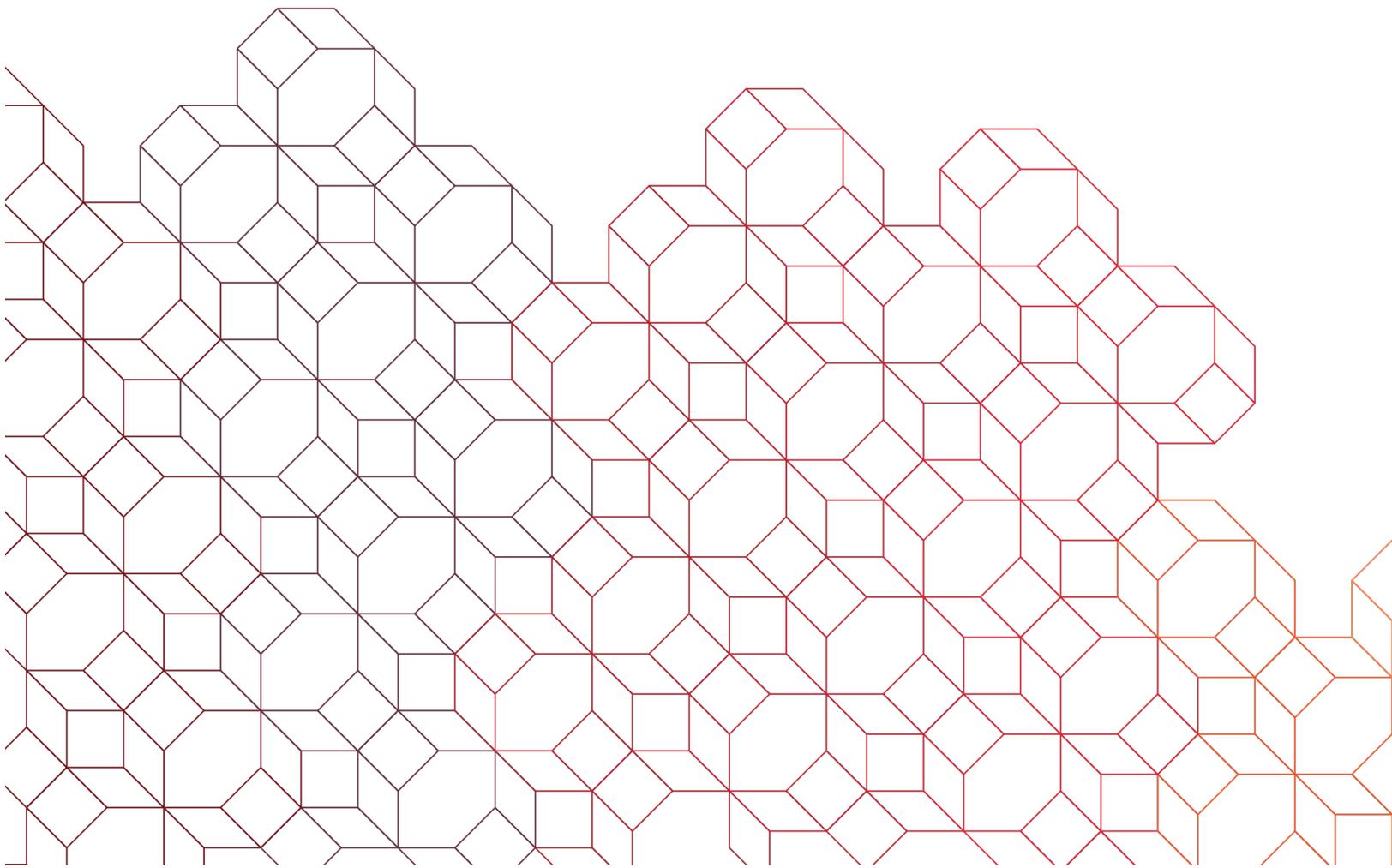




Exchange

General Navigation



Depending on services your company is using as well as permission you have, what is shown here may differ from what you see.

BOK FINANCIAL | Exchange CC5ADMIN1 Logout

My Dashboard | Payments & Transfers | Fraud & Risk Management | Reporting | Administration

Good Afternoon, Cc5admin1.
Last Login 04/10/2025 12:46 PM

After you log in to Exchange, you are brought to your Dashboard.

- **Most Visited** – is a widget that displays your top five visited locations as you continue to use the system. Additional widgets may display depending on user access.

Most Visited

- User Administration
- Payments
- Positive Pay
- Balance and Transaction Reporting
- Report Management

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BOK FINANCIAL | Exchange BC13ADMIN5 Logout

My Dashboard | Payments & Transfers | Fraud & Risk Management | Reporting | Administration

At the top of the screen is your navigation bar. Menu choices are based upon user services and/or permissions. Some shown here will not display if you do not have that service or permission. Details in each are provide in those service related guides.

- **My Dashboard** – from anywhere within the application, when selected will take you to the Dashboard.
- **Payments & Transfers** – provides access to all payment and transfer services.
- **Fraud & Risk Management** – provides access to all fraud related services.
- **Reporting** – provides access to reports and download functionality.
- **Administration** – Provides access to user and role maintenance.

Top right of the screen:

- **Logout** – it is highly recommended to physically click “Logout” whenever exiting the system, so your user ID it properly logged out.
- **Bell Icon** – directs you to the Alert Center and will have a red dot indicating any new alerts.
- **Profile** – to the left of Logout, is your user profile, which you can perform some minor edits.

Home / My Profile

My Profile

My Profile Security

General

Legal name TMM Tester <input type="button" value="Edit"/>	Username TMMTester1	Password <input type="button" value="Edit"/>
Email address email@email.com <input type="button" value="Edit"/>	Phone number 5555555555 <input type="button" value="Edit"/>	Time zone America/Chicago <input type="button" value="Edit"/>

When you select your profile, you may click "Edit" to update some of your information:

- **Legal name** – correct your name due to a name change.
- **Password** – change your current password.
- **Email address** – change/update your email address.
- **Phone number** – change/update your phone number.
- **Time zone** – change your local time zone.

My Profile **Security**

MFA Contact Points

Phone number +15555555555 Unenroll	Okta Verify – <input type="button" value="Enroll"/>
---	--

We recommend enrolling in Okta Verify via a desktop device. Otherwise you will only be enrolled in passcode, and not in push notifications.

i You must always have at least one saved MFA contact point. You cannot remove all MFA Contact Points.

The "Security" tab contains your contact points for multi-factor authentication, such as the phone number for one-time passcode. This is also where you can change the contact point.

Note: Should the OTP phone number require an update, and you are only enrolled in one authentication factor, you must enroll in another authentication factor, then "unenroll" the phone number and "enroll" with the new phone number. Your Exchange Corporate Administrator can also reset your MFA contact points which will prompt you to establish a new MFA contact point the next time you login.

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At the bottom of the screen are quick links.

- **Resource Center** – directs you to **Exchange** resources that include Quick Reference Guides, FAQs and videos.
- **Locations** – directs you to a Banking Center location search page for branches, ATMs or Mortgage offices near you.
- **Terms & Conditions** – directs to you the **Exchange** terms and conditions.
- **Privacy & Security** – directs you to the Bank's Online Security best practices.
- **Contact Us** – provides market contact numbers should you need assistance with Exchange.