



COMMERCIAL ADVANTAGE

Transmission Profile Set Up Quick Reference Guide

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Member FDIC



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Overview

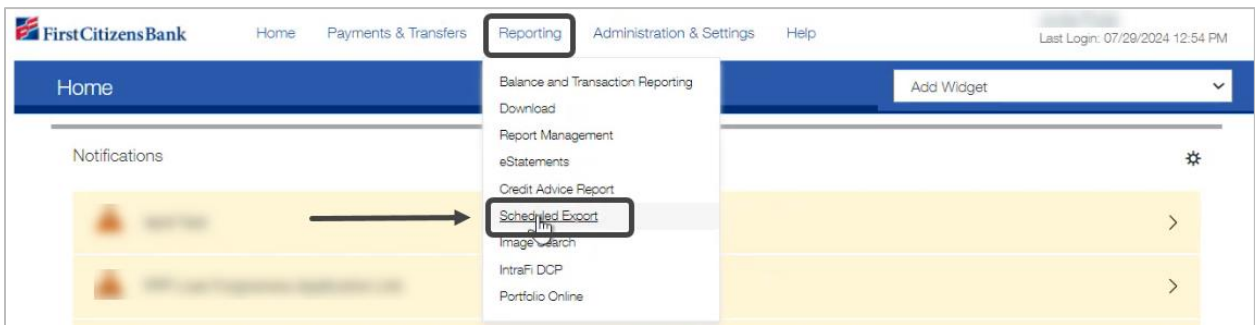
Transmission Profile is an extension of the Scheduled Export feature which allows clients to schedule custom reports/files to be made available for delivery on a recurring basis.

Transmission Profiles allows you to:

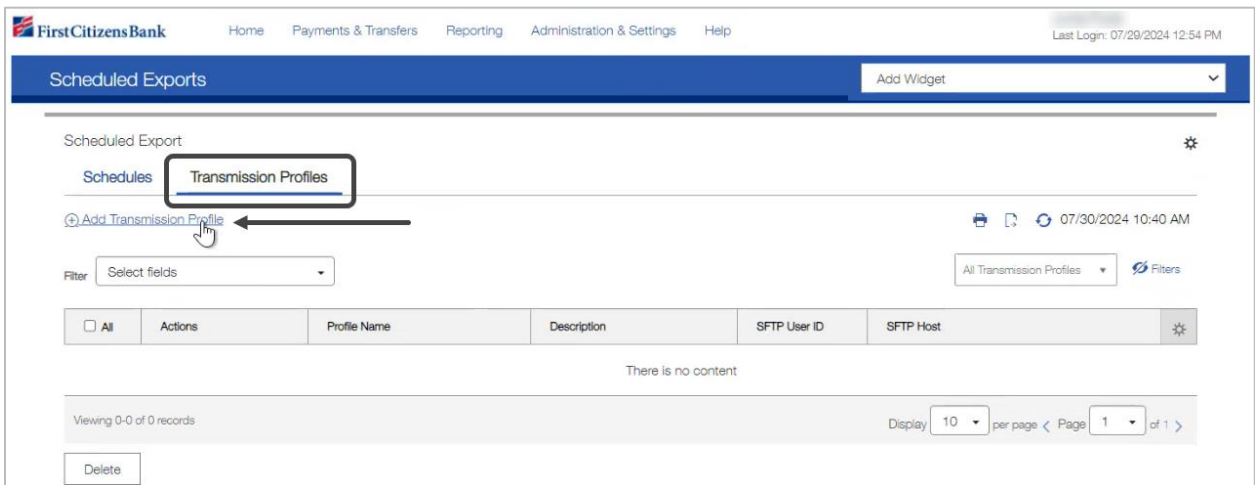
1. Set-up a profile that connects Commercial Advantage to your internal file transfer tool.
2. Send the scheduled reports/files directly from CA to your file transfer tool via Secure File Transfer Protocol (SFTP).

How to Set Up a Transmission Profile

1. From the home page, select the **Scheduled Export** option under **Reporting**.

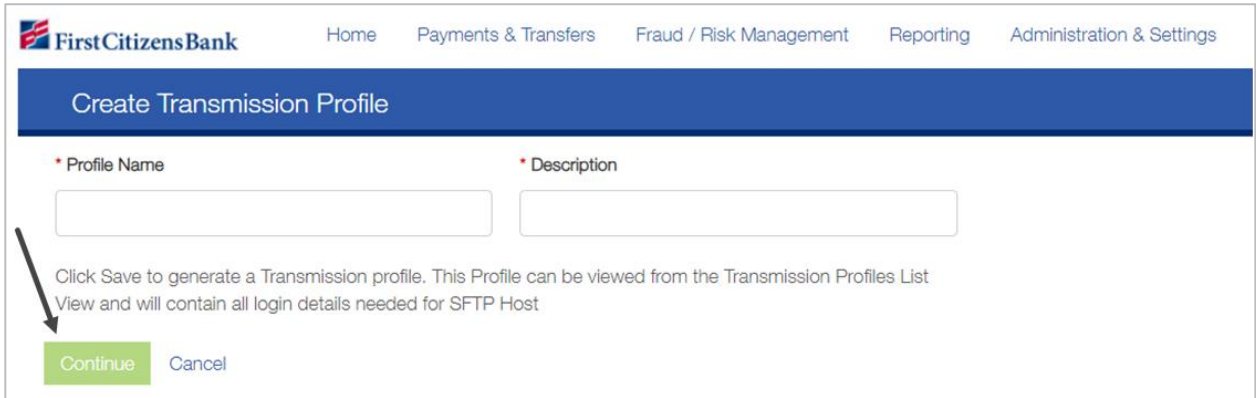


2. Select **Transmission Profiles** tab, then click on **+Add Transmission Profile**.



- Complete the required fields, then select **Continue**.

Note: Click outside of the field box if the **Continue** button is not active.



First Citizens Bank Home Payments & Transfers Fraud / Risk Management Reporting Administration & Settings

Create Transmission Profile

* Profile Name * Description

Click Save to generate a Transmission profile. This Profile can be viewed from the Transmission Profiles List View and will contain all login details needed for SFTP Host

Continue Cancel

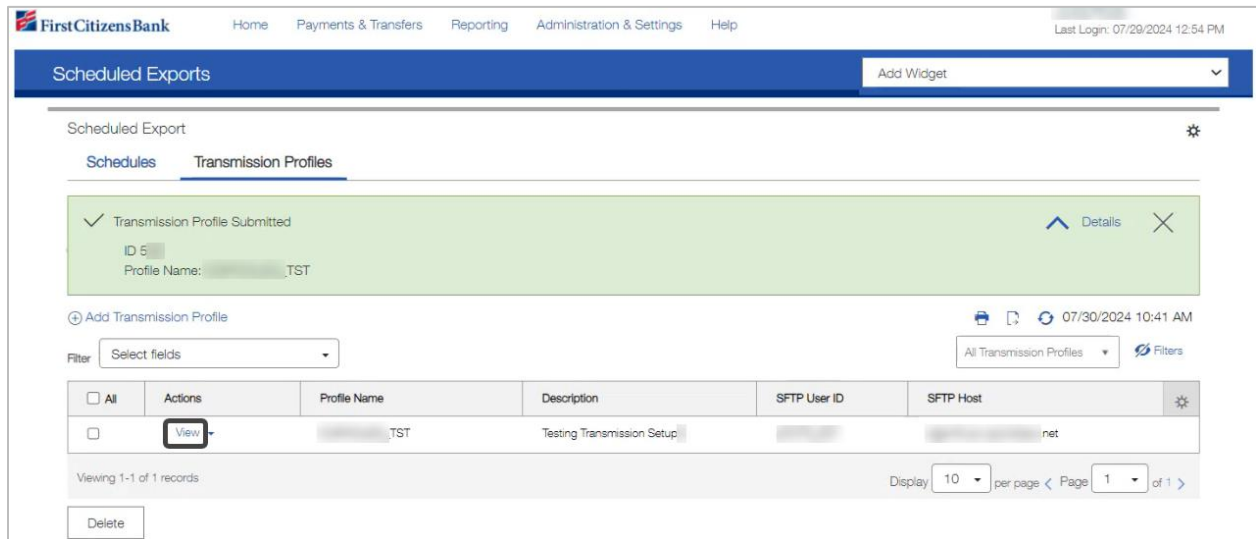
- A success message will display.



✓ Transmission Profile Submitted [Details](#)

ID 5
Profile Name: [redacted].TST

- Select **View** to review the Transmission Profile you created which will appear under the success message.



First Citizens Bank Home Payments & Transfers Reporting Administration & Settings Help Last Logn: 07/30/2024 12:54 PM

Scheduled Exports

Scheduled Export

Schedules Transmission Profiles

✓ Transmission Profile Submitted [Details](#)

ID 5
Profile Name: [redacted].TST

+ Add Transmission Profile 07/30/2024 10:41 AM

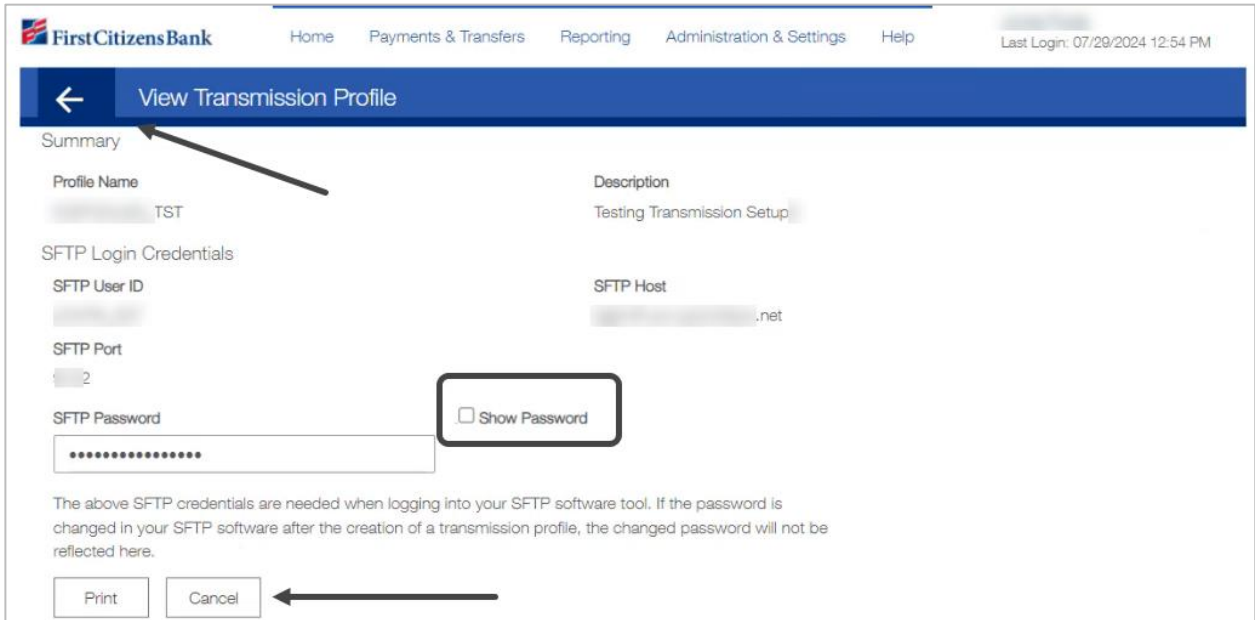
Filter: Select fields All Transmission Profiles Filters

<input type="checkbox"/> All	Actions	Profile Name	Description	SFTP User ID	SFTP Host
<input type="checkbox"/>	View	[redacted].TST	Testing Transmission Setup	[redacted]	[redacted].net

Viewing 1-1 of 1 records Display 10 per page Page 1 of 1

Delete

- The **Summary** page will display as below. Select the checkbox next to **Show Password** to view the SFTP password. Select the back arrow button on the top left corner of the page or the **Cancel** button to return to the Transmission Profile page.



First Citizens Bank Home Payments & Transfers Reporting Administration & Settings Help Last Login: 07/29/2024 12:54 PM

← View Transmission Profile

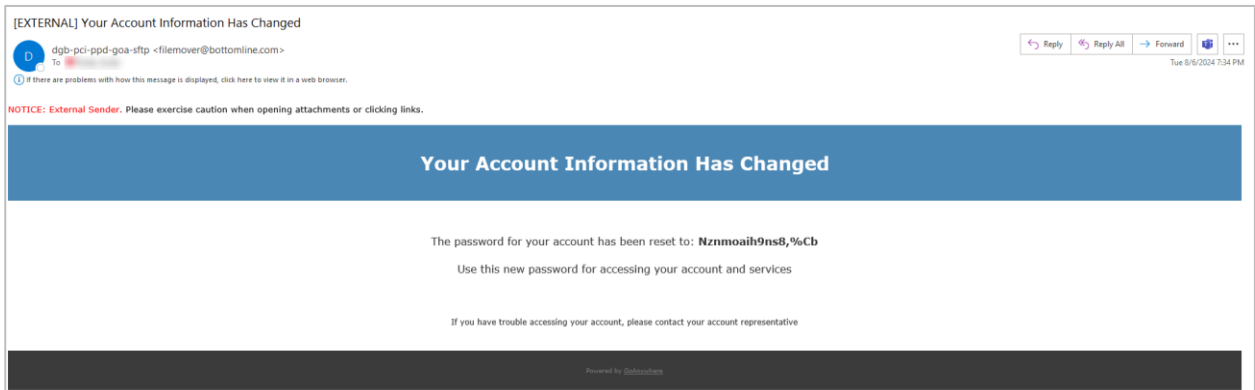
Summary

Profile Name TST	Description Testing Transmission Setup
SFTP Login Credentials	
SFTP User ID [Redacted]	SFTP Host [Redacted].net
SFTP Port 2	
SFTP Password [Redacted]	<input type="checkbox"/> Show Password

The above SFTP credentials are needed when logging into your SFTP software tool. If the password is changed in your SFTP software after the creation of a transmission profile, the changed password will not be reflected here.

Print Cancel

Note: When a Transmission Profile is created, an email will be sent to the user being set up. The user profile email address will be used to send this notification.



The below table provides the necessary credentials required for setup in your FTP tool for accessing the server where the files are located.

SFTP User ID	Client's user id for logging into the server.
SFTP Port	Port needed for connecting to the server.
SFTP Host	URL needed for connecting to the server.
SFTP Password	Client's user id for logging into the server. *Note: The password cannot be changed via the Client Application nor the Bank Admin application.

Questions?

We're here to help. Contact Business Engagement Center with questions at 866-322-4249. Our team is happy to assist you.