



# Secure Email Systems Guide



Montecito  
Bank & Trust®



## Getting Started

Protecting the privacy of your confidential information is critical to Montecito Bank & Trust and our associates. We utilize a secure email system that uses encryption to transmit sensitive information outside of the Bank's network.

This guide illustrates step-by-step how to use our secure email system. Our associates are also available to assist if you have additional questions.

### **Support Contact Information**

Email: [online@montecito.bank](mailto:online@montecito.bank)

Phone: 1-(805)-963-7511

Website: <https://montecito.bank/contact>

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## Secure Email System Introduction

You can register for the Bank's secure email system by visiting our website. Simply follow these steps to get started.

### Registration

1. Visit: <https://montecito.bank/contact>.
2. Scroll down the page and click the tab on the right labeled **Secure Messaging**.
3. Click the orange **Open MB&T Secure Mail** button.

Write Us      Schedule A Visit      **Secure Messaging**


### MB&T Secure Mail

Please use our Secure Mail service for sending emails to MB&T associates concerning personal or business banking matters, when confidential information is involved. This includes cases when we request you to send us documents or other financial information. Keeping your data safe is our top priority.

#### How to use MB&T Secure Mail

1. **Open MB&T Secure Mail**
2. Enter your email address when prompted, then click Continue.
3. Fill in the registration information (be sure to remember this password), then click Continue.
4. A verification email has been sent to your email address. Click the link in this email to activate your account.
5. After your account has been verified, click Continue.

4. In the box that appears enter your email address and click the blue **Continue** button.

 **Montecito Bank & Trust**

### Secure Email

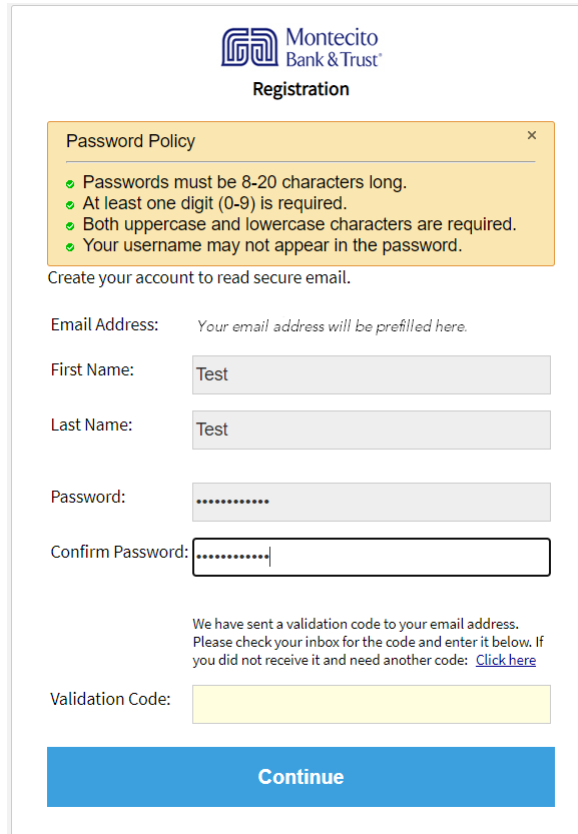
Please provide your email address to proceed.

First time here? *You'll be asked to register.*

**Continue**

5. A second box will appear and request that you enter your first name and last name and create a password using the following requirements:
  - Passwords must be 8-20 characters long.
  - At least one digit (0-9).
  - Both uppercase and lowercase characters are required.

- Your username **cannot** appear in the password.



**Montecito Bank & Trust<sup>®</sup>**  
Registration

Password Policy

- Passwords must be 8-20 characters long.
- At least one digit (0-9) is required.
- Both uppercase and lowercase characters are required.
- Your username may not appear in the password.

Create your account to read secure email.

Email Address: *Your email address will be prefilled here.*

First Name:

Last Name:

Password:

Confirm Password:

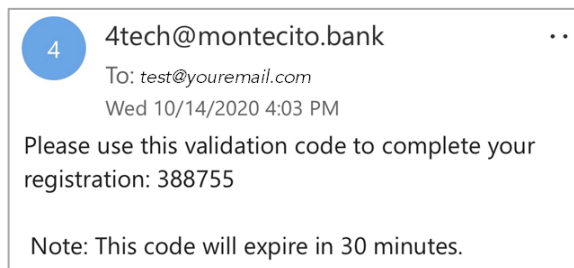
We have sent a validation code to your email address.  
Please check your inbox for the code and enter it below. If you did not receive it and need another code: [Click here](#)

Validation Code:

**Continue**

6. Login to the email account that you entered during registration. You should receive an activation email titled **Proofpoint Encryption Registration** from an address that ends in @montecito.bank. The email will contain a validation code.

#### Email Preview:



4 4tech@montecito.bank ...

To: test@youremail.com  
Wed 10/14/2020 4:03 PM

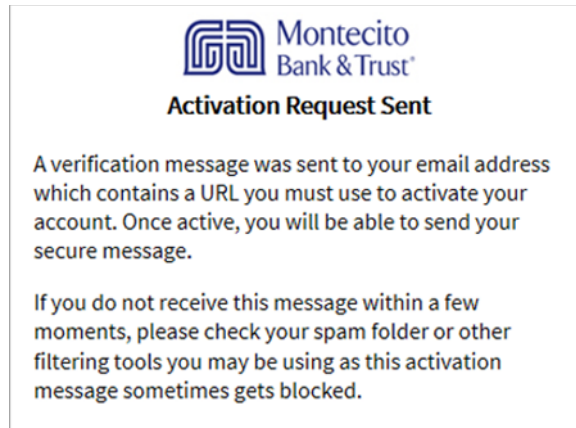
Please use this validation code to complete your registration: 388755

Note: This code will expire in 30 minutes.



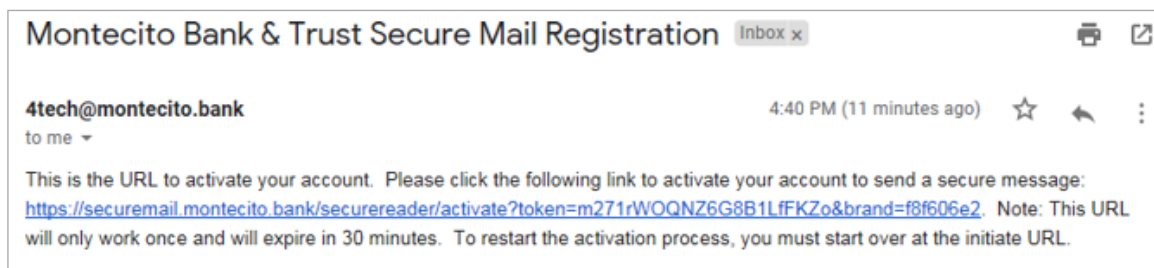
**Note:** The link will expire after thirty minutes.

7. Enter the validation code then click the blue **Continue** button and the browser will display a message confirming that an activation email was sent.



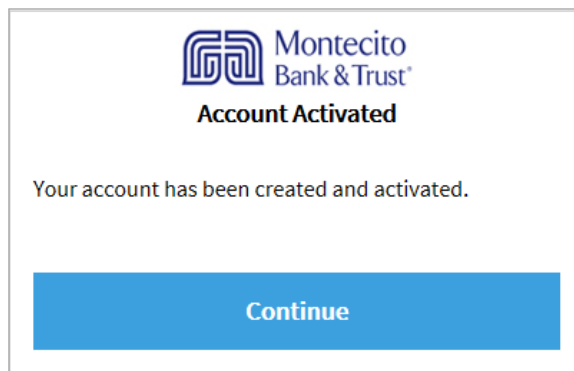
8. Login to the email account that you entered during registration. You should receive an activation email titled **Montecito Bank & Trust Secure Mail Registration** from an address that ends in @montecito.bank. The email will contain a link to activate your account. If it does not arrive, please check your spam folder.

**Email Preview:**



**Note:** The link will expire after thirty minutes.


9. Click the activation link in the email and a window will pop up to confirm your account has been activated. Click **Continue** to complete the registration process.



## Password Reset

In the event that you have forgotten your password, follow these simple steps.

1. Follow steps 1-4 on page 4 in the **Registration** section of this guide.
2. Click the **Forgot Password** link and a Password Reset confirmation page will display in your browser.



Login


Log in to compose a secure message.

montytest1975@gmail.com

Password

**Forgot Password**

Continue



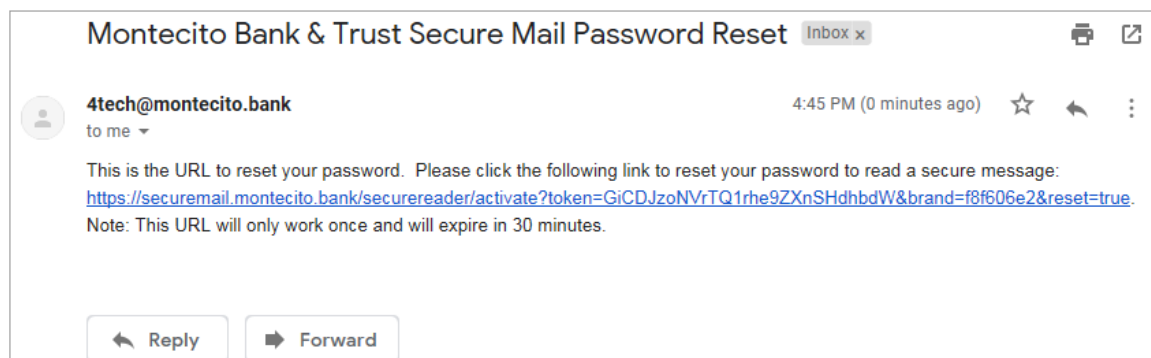
**Password Reset Request Sent**

A password reset message was sent to your email address. Please click the link in that message to reset your password.

If you do not receive the password reset message within a few moments, please check your spam folder or other filtering tools.

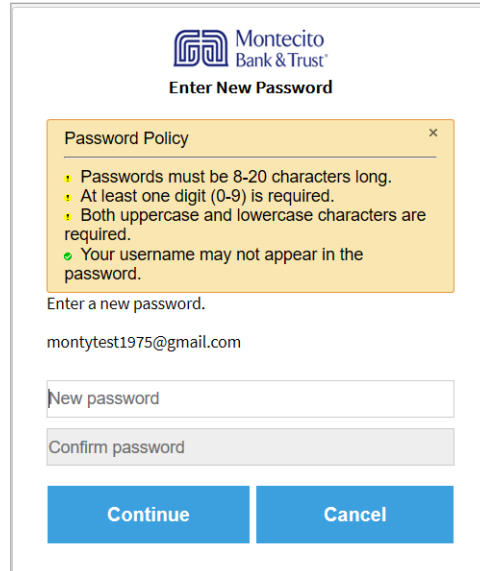
3. You will receive an email titled **Montecito Bank & Trust Secure Mail Password Reset**, coming from an address that ends in @montecito.bank. The body of the email will contain a link to activate your account to begin sending secure messages.

### Email Preview:



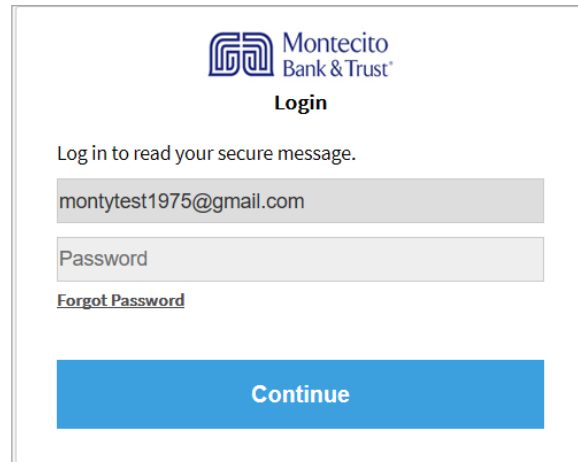
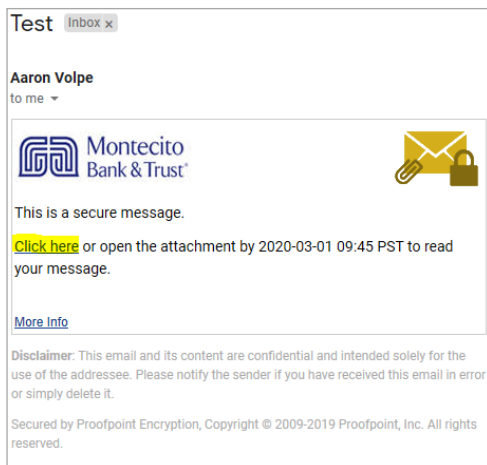
**Note:** The link will expire after thirty minutes.

4. Click the link and a window will pop up to reset your password. Once you reset your password, select the blue **Continue** button. Password requirements are as follows:
  - Passwords must be 8-20 characters long.
  - At least one digit (0-9).
  - Both uppercase and lowercase characters are required.
  - Your username **cannot** appear in the password.
5. The secure email system will open.



## Receiving a Secure Email from MB&T

1. When a secure email is sent from MB&T, open the email and select **Click Here** to be directed to the secure email system log-in page.



**Note:** If you have yet to register for the secure email system, you will be prompted to do so at this time.

2. Open the email you would like to view along with any corresponding attachments. To reply to a message, simply click one of the blue **Reply** or **Reply All** buttons.



Reply

Reply All

Test

From: Aaron Volpe

To: 'montytest1975@gmail.com'

Cc:

Sent: 1/31/2020 9:45:08 AM

This is a test demonstrating how the secure email service works.

Here is a fake social security number:

555-55-5555

Security Notice: When emailing confidential information, please use our secure email system found under Contact Us/Secure Messaging on our website.

Confidentiality Notice: The documents accompanying this e-mail transmission are legally protected and intended only for the use of the individual or entity named above. If you are not the intended recipient, you are hereby notified that any disclosure, copying, distribution or the taking of any action in reliance on the contents of this e-mail information is strictly prohibited. If you have received this transmission in error, please immediately notify us by return e-mail and destroy the original transmission and its attachments without reading or saving it in any manner. Thank you.

- To send your reply, click the blue **Send** button. You may also request a copy of the email by checking the **Send Me a Copy** checkbox.

Send

Cancel

Help

To: avolpe@montecito.bank

Subject: RE: Test

☐ Send me a copy

Attach a file

Sans Serif

Normal

B

I

U

S

A

x<sub>2</sub>

x<sup>2</sup>

H<sub>1</sub>

H<sub>2</sub>

”

Here is my reply!

From: Aaron Volpe

Sent: Fri, 31 Jan 2020 17:45:08 +0000

To: 'montytest1975@gmail.com'

Cc:

Subject: Test

This is a test demonstrating how the secure email service works.

Here is a fake social security number:

555-55-5555

Security Notice: When emailing confidential information, please use our secure email system found under Contact Us/Secure Messaging on our website.

- A confirmation box will appear. From here you can **Create a New Message**, **Return to the Previous Message** or **Logout** of the secure email system.

Montecito Bank & Trust

Message Sent

Your secure message was sent successfully.

To exit click Logout or close this browser window.

New Message

Return To Message

Logout

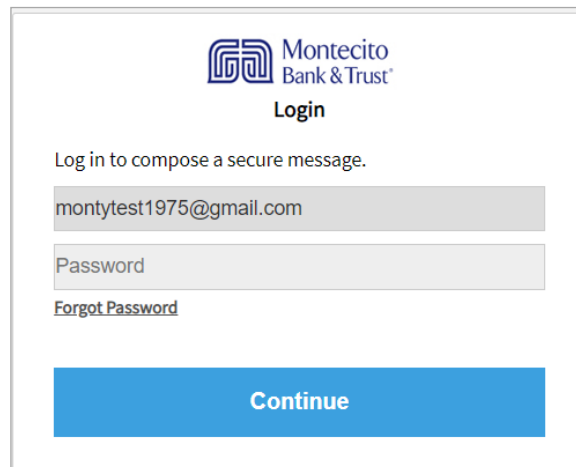
Secure Email System Handbook

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Rev. 10/20

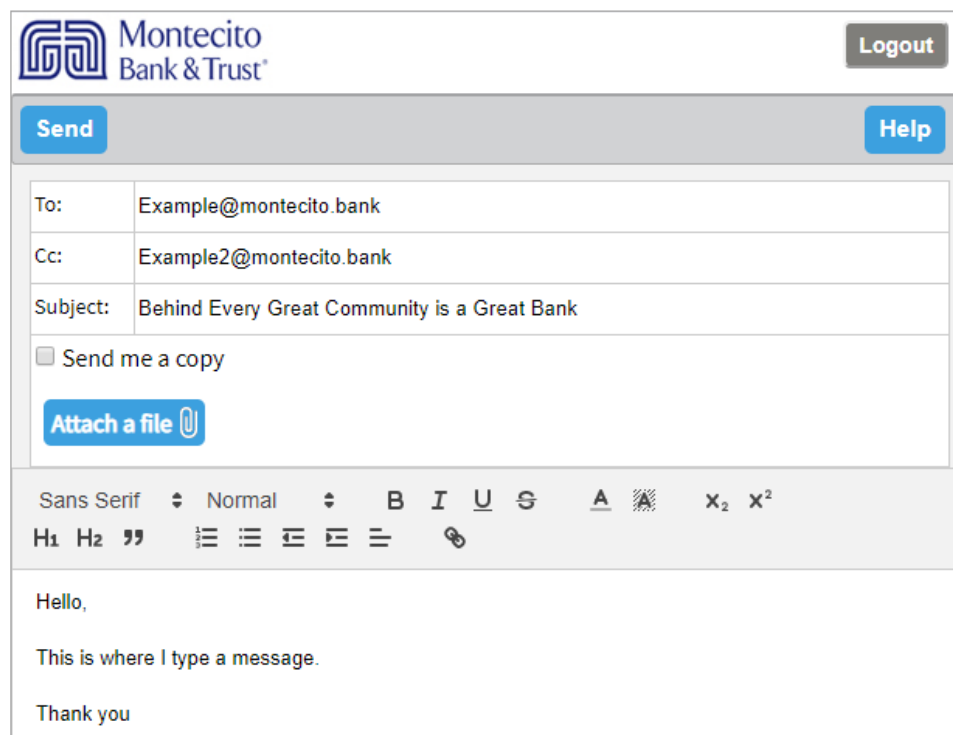
## Sending a Secure Email to MB&T

1. Follow steps 1-4 on page 4 in the **Registration** section of this guide.
2. A box will appear and request that you enter your password. Click the blue **Continue** button.



The image shows a login window for Montecito Bank & Trust. At the top is the bank's logo and name. Below it is the word "Login". A message says "Log in to compose a secure message." There are two input fields: one for an email address (containing "montytest1975@gmail.com") and one for a password. Below the password field is a link that says "Forgot Password". At the bottom is a large blue button labeled "Continue".

3. Once you have logged in, you will arrive at the following screen. The "To," "Cc," and "Subject," fields function the same as traditional email. The white area at the bottom is used to compose the email.



The image shows an email composition interface for Montecito Bank & Trust. At the top left is the bank's logo and name. At the top right is a "Logout" button. Below the header is a grey bar with a "Send" button on the left and a "Help" button on the right. The main area contains fields for "To:" (Example@montecito.bank), "Cc:" (Example2@montecito.bank), and "Subject:" (Behind Every Great Community is a Great Bank). Below these fields is a checkbox labeled "Send me a copy" and a blue button labeled "Attach a file" with a paperclip icon. Below the attachment button is a rich text editor toolbar with options for font face (Sans Serif), font size (Normal), bold (B), italic (I), underline (U), strikethrough (ABC), text color (A), background color (A), subscript (x<sub>2</sub>), and superscript (x<sup>2</sup>). Below the toolbar is a text area containing the text "Hello," "This is where I type a message.", and "Thank you".

4. To attach a file, click the **Attach a File** button and click the **+ Sign** button to browse for a file. Once the file is selected it will show up under the **Attach a File** button.

5. Once complete, press **Send** and a confirmation box will appear and prompt you to create another message, or logout of the secure email system.

To:	Example@montecito.bank
Cc:	Example2@montecito.bank
Subject:	Behind every great community is a great bank.
<input type="checkbox"/> Send me a copy	
<div> <div>Attach a file</div> <div>  20190924034454.pdf [X]         </div> </div>	

*Disclaimer: The secure email system (the system) only provides encryption services when communicating with Montecito Bank & Trust (MB&T) in the methods outlined in this document. The system can't be used for communicating with parties outside of MB&T, and the system does not afford or assume any protections outside of this document's scope.*