

## Secondary Users

Preferences → Internet Banking Options → Secondary Users

The Secondary Users screen gives account owners the ability to grant non-account owners individualized access to the Online Banking/Cash Management system. This screen is also used to view, edit, or remove secondary users from the system.

SECONDARY USERS			SECONDARY USER OPTIONS
			Create New Secondary User
			SEARCH
CUSTOMER.ID	CREATE DATE	LAST LOGGED IN	
****0001-779-brooke	10/09/2018 08:33 AM	10/10/2018 11:11 AM	<a href="#">Edit</a>
****0001-JohnBanker	07/24/2017 08:48 AM	04/17/2019 03:11 PM	<a href="#">Edit</a>

### Creating a New Secondary User

Preferences → Internet Banking Options → Secondary Users → *Create New Secondary User*

New Secondary User

**Customer Number:** 100001

USER NAME

PASSWORD

CONFIRM PASSWORD

**Customer Number** Customer number for the primary account owner.

**User Name** User name for the secondary user.

**Password** Password for the secondary user.

**NOTE:** Based on Secondary User Rights, the secondary user may be forced to change their password upon login.

**Confirm Password** Confirm password for the secondary user.

EDIT SECONDARY USER		SECONDARY USER OPTIONS
<b>Customer Number</b> 100001	USERNAME JohnBanker	Change Password
<b>Status</b> Enabled	<b>Last Login</b> 4/17/2019 3:11:54 PM	Generate Temporary Verification Code
Secondary User Rights		Delete Secondary User
<input checked="" type="checkbox"/> CAN CHANGE PASSWORD	<input type="checkbox"/> FORCE PASSWORD CHANGE	<input checked="" type="checkbox"/> ALLOW MESSAGING
<input checked="" type="checkbox"/> ALLOW BILLPAY	<input type="checkbox"/> USE PRIMARY USER'S ACCOUNT FRIENDLY NAMES	<b>Save Changes</b>
<input checked="" type="checkbox"/> EXTERNAL ACCOUNT SETUP		Cancel
Cash Management Rights		
<input checked="" type="checkbox"/> EDIT ACH COMPANY	<input checked="" type="checkbox"/> VIEW ACH REPORTS	<input checked="" type="checkbox"/> EDIT ACH PARTICIPANTS

- Customer Number** Customer number for the primary account owner.
- User Name** User name for the secondary user.
- Status** Indicates the status of the secondary user.
- Last Login** Displays the last time the secondary user logged in.
- Secondary User Rights** Indicates which rights the secondary user has within Online Banking. *Options are:*
- Can change password – Secondary user is able to change their password.
  - Force password change – Secondary user will be forced to change their password upon login.
  - Allow messaging – Secondary user has access to messaging.
  - Allow billpay – Secondary user has access to billpay.
  - User primary user's account friendly names – Indicates the accounts display the user friendly name established by the primary user.
  - External Account Setup – Secondary user has access to create linked accounts.

**NOTE:** *Secondary user rights available vary by financial institution.*

**Account**

**TIP:** Click the account number/name to display the account limits.

Checking																	
ACCOUNT	VIEW	XFER IN	XFER OUT	EXTER IN	EXTER OUT	APPR	APPR SELF	ACH DB	ACH CR	\$\$ ONLY	PART ONLY	TAX PAY	WIRE TRAN	TMPL SETUP	TMPL USE	APPR	APPR SELF
<a href="#">Charles Checking</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>													
Account Limits	External Funds Transfer In	External Funds Transfer Out	ACH Debit Batch	ACH Credit Batch	ACH Tax Payment	Wire Transfer											
Daily Amount Approval	\$ 1000.00	\$ 1000.00	\$	\$	\$	\$											
Transaction Amount Approval	\$ 500.00	\$ 500.00	\$	\$	\$	\$											

<b>View</b>	Indicates if the secondary user is able to view the account.
<b>Xfer In</b>	Indicates if the secondary user is able to transfer funds into the account.
<b>Xfer Out</b>	Indicates if the secondary user is able to transfer funds out of the account.
<b>Exter In</b>	Indicates if the secondary user is able to create external transfers into the core system.
<b>Exter Out</b>	Indicates if the secondary user is able to create external transfers from the core system.
<b>Appr</b>	Indicates if the secondary user is able to approve external transfers.
<b>Appr Self</b>	Indicates if the secondary user is able self-approve external transfers.
<b>View Stmt</b>	Indicates if the secondary user is able to view statements.

**Account Limits**

<b>Daily Amount Approval</b>	Indicates the daily amount the secondary user can approve or self approve for external funds transfer in or out.
<b>Transaction Amount Approval</b>	Indicates the per batch transaction amount the secondary user can approve for external funds transfer in or out.

**NOTES:**

- *The External Funds Transfer In/Out section will only be available if your financial institution offers external funds transfers.*
- *Approval rights are based on the Appr and Appr Self check box.*
- *If these fields are left blank and the Appr or Appr Self check box is selected, the user will have infinite approval limits.*

**Secondary User Options**

<b>Change Password</b>	Displays the Change Password screen for the displayed secondary user.
<b>Generate Temporary Verification Code</b>	Generates a temporary verification code which can be provided to the secondary user for login.
<b>Delete Secondary User</b>	Deletes the displayed secondary user.
<b>Save Changes</b>	Click to retain changes made on the Edit Secondary User screen.
<b>Cancel</b>	Click to return to the Secondary Users screen.

To create a new secondary user:

1. On the Secondary Users screen, select *Create New Secondary User*.
2. Enter a user name.
3. Enter a password.
4. Confirm the entered password.
5. Click **Continue**.
6. Select the Secondary User Rights as needed.
7. Check the account rights needed for each checking and/or savings account.
8. Click **Save Changes**.
9. The user will then need to login and complete the authentication process designated by your financial institution.

To edit or delete a secondary user:

1. On the Secondary Users screen, select *Edit* for the appropriate customer ID.
2. If editing, make changes as needed and click **Save Changes**.
3. If deleting, click *Delete Secondary User*.

To restore a previously deleted secondary user:

1. On the Secondary Users screen, select *Edit* for the appropriate customer ID.
2. Click **Save Changes**. This will restore the user.
3. Make changes as needed and click **Save Changes**.