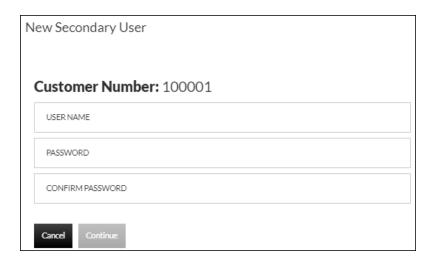
Secondary Users

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 OPTI Create New Secondary User	ONS		
		SEARCH		
CUSTOMERID	CREATE DATE	LAST LOGGED IN		
****0001-779-brooke	10/09/2018 08:33 AM	10/10/2018 11:11 AM	Edit	
****0001-JohnBanker	07/24/2017 08:48 AM	04/17/2019 03:11 PM	Edit	

Creating a New Secondary User Preferences → Internet Banking Options → Secondary Users → Create New Secondary User



Customer Number Customer number for the primary account owner.

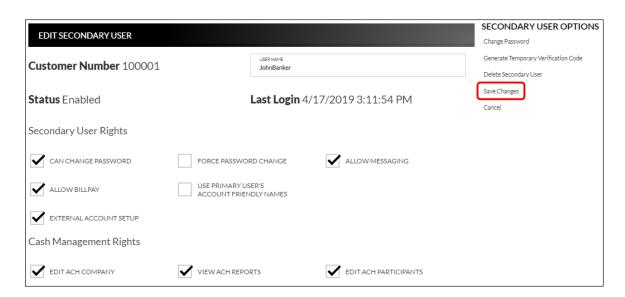
User Name User name for the secondary user.

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.



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

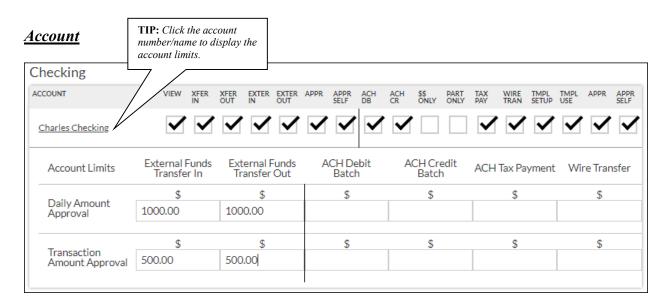
Displays the last time the secondary user logged in.

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.



View Indicates if the secondary user is able to view the account.

Xfer In Indicates if the secondary user is able to transfer funds into the

account.

Xfer Out Indicates if the secondary user is able to transfer funds out of the

account.

Exter In Indicates if the secondary user is able to create external transfers

into the core system.

Exter Out Indicates if the secondary user is able to create external transfers

from the core system.

Appr Indicates if the secondary user is able to approve external transfers.

Appr Self Indicates if the secondary user is able self-approve external

transfers.

View Stmt Indicates if the secondary user is able to view statements.

Account Limits

Daily Amount Approval Indicates the daily amount the secondary user can approve or self

approve for external funds transfer in or out.

Transaction Amount

Approval

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

Change Password Displays the Change Password screen for the displayed secondary

user.

Generate Temporary Verification Code Generates a temporary verification code which can be provided to

the secondary user for login.

Delete Secondary User Deletes the displayed secondary user.

Save Changes Click to retain changes made on the Edit Secondary User screen.

Cancel Click to return to the Secondary Users screen.

To create a new secondary user:

1. On the Seconday 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**.