Preferences

Security Options

Customer Preferences
Preferences → Security Options → Customer Preferences

The Customer Preferences screen displays basic information regarding the customer along with the additional applications the customer has access to.

CUSTOMER PREFERENCES	
PREFERENCE	**CURRENT VALUE**
Customer	----0001
Login Name	SusanBanker
Email Address	
Email alert for new message	Enabled
Mobile Phone #	*** Not Activated ***
Secondary Users	Allowed
Cash Management	Enabled

Contact/Authorization Method
Preferences → Security Options → Change Security Contact

The Contact/Authorization Method screen displays contact methods that have been created.

Contact / Authorization Method

CONTACT METHOD

These are the contact methods you have previously entered. When signing into Online Banking, you may be asked to select a contact method to have your security code sent to.

New Contact Method

CONTACT LIST

SEARCH

NAME	VERIFYDATE	CONTACTDISP	
Brandi	12/28/2016 8:55:18 AM	bhobbs@datacenterinc.com	×
Brooke Fuller	1/17/2018 1:38:54 PM	bfuller@datacenterinc.com	×

1. Click **New** or *New Contact Method* to create a new contact method.
2. Indicate the method for contact in the Contact Type field.
3. Enter a name in the Name field. This is only used to reference the contact method.
4. Enter the Phone Number, Email or Google Authenticator information.
5. Click **Submit**.

6. Enter the verification code received via email or text message. If needed, click **Resend** to receive a new code.
7. Click **Submit**.

If **Cancel** was selected, the contact method can still be verified on the Contact/Authorization Method screen. Select ⚠ to be returned to the Verify Contact screen.

Edit Login Name
Prefereces → Security Options → Change Login Name

The Edit Login Name screen is used to edit your login name.

EDIT LOGIN NAME

For security reasons, your Login Name may not be the same as your Customer number.
The Login Name you create may be up to 15 characters in length.
The next time you sign in to Online Banking, you _must_ use this Login Name.

LOGIN NAME
SusanBanker

[Cancel] [Submit]

Change Password
Prefereces → Security Options → Change Password

The Edit Password screen is used to edit your password.
1. Enter the current password used to login to Online Banking.
2. Enter the new password in the New Password field.
3. Re-enter the password in the Confirm Password field.
4. Click **Submit**.

EDIT PASSWORD

Your new password is case sensitive and may be any combination of letters, numbers, and keyboard characters. Your password must also meet the following requirements:
Passwords must contain a minimum of 6 to a maximum of 15 characters

CURRENT PASSWORD

NEW PASSWORD

CONFIRM NEW PASSWORD

[Cancel] [Submit]

Internet Options

Edit Email Info
Prefereces → Internet Banking Options → Update Email Address

The Edit Email Info screen is used to edit the email address utilized within Online Banking. This is the address notifications will be sent to regarding correspondence within the Online Banking system.

EDIT EMAIL INFO

Changing your email address will invalidate the email address previously registered.

EMAIL ADDRESS
bbanker@none.com

✔ SEND AN ALERT TO THIS ADDRESS WHEN I RECEIVE A SECURE MESSAGE.

| Cancel | Submit |

Account Names
Prefereces → Internet Banking Options → Friendly Account Names

The Friendly Account Names screen is used to create and edit user defined names for the diplayed accounts. Once a name has been created, that name will display throughout Online Banking instead of the account number.

NOTE: *If your bank offers remote deposit capture and there is duplication of names or useage of special characters in these fields, this will cause errors during the registration process.*

Use the sort order column to indicate the order the accounts should display. Sorting will only take effect per account type. For example, you cannot sort checking and loan accounts so they display in a mixed order.

ACCOUNT NAMES				
Checking				
Account #	Available Balance	Balance		
1	$152,442.69	$152,442.69	ACCOUNT NAME Charles Checking	SORT ORDER
Loan				
Account #	Available Balance	Balance		
1	$0.00	$0.00	ACCOUNT NAME Boat Loan	SORT ORDER 2
20	$13.25	$40,349.06	ACCOUNT NAME Mazda Loan	SORT ORDER 3
100	$6,000.00	$7,000.00	ACCOUNT NAME ******963	SORT ORDER 1

Cancel   Submit

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	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*

New Secondary User

Customer Number: 100001

USER NAME

PASSWORD

CONFIRM PASSWORD

Cancel   Continue

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.*

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
Charles Checking	✔	✔	✔	✔	✔	✔	✔	✔	✔			✔	✔	✔	✔	✔	✔

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	$	$	$	$

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 seconday 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.
Restore Secondary User	Click to restore a secondary user that has been deleted. **NOTE:** *This option only displays if Edit was selected for a secondary user that had previously been deleted.*

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*.
NOTE: *To restore a secondary user that has been deleted, click Edit → Restore Secondary User.*

Opt In Agreements/Policies
Prefereces → Internet Banking Options →Opt In Agreements/Policies

The Opt In Aggreements screen displays opt in aggrements/policies for the financial instution.

OPT-IN AGREEMENTS		
		SEARCH
NOTICE	**UPDATED**	**STATUS**
Account Changes	04/04/2018	Opted In on 04/04/2018
E-Mail Address Registration	09/04/2012	Opted In on 03/06/2019
Test Notice	01/31/2019	N/A

POLICIES		
		SEARCH
NOTICE	**UPDATED**	**STATUS**
Card Chargeback Policy	06/08/2017	N/A
Privacy Policy	06/26/2017	Accepted on 09/07/2018