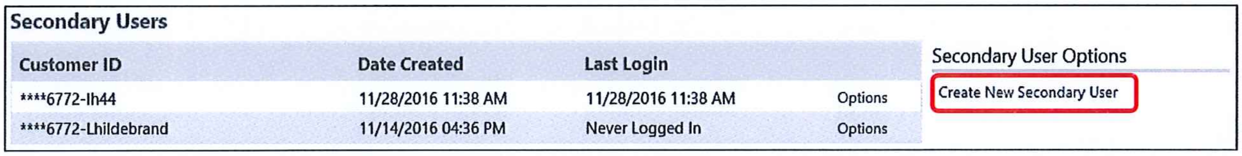
Secondary Users

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 Internet Banking/Cash Management system. This screen is also used to view, edit, or remove secondary users from the system.


Secondary Users

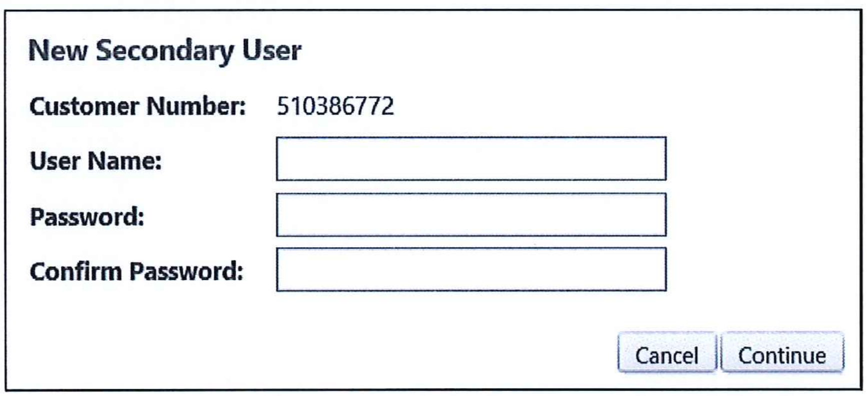
Customer ID	Date Created	Last Login	
****6772-lh44	11/28/2016 11:38 AM	11/28/2016 11:38 AM	Options
****6772-Lhildebrand	11/14/2016 04:36 PM	Never Logged In	Options

Secondary User Options

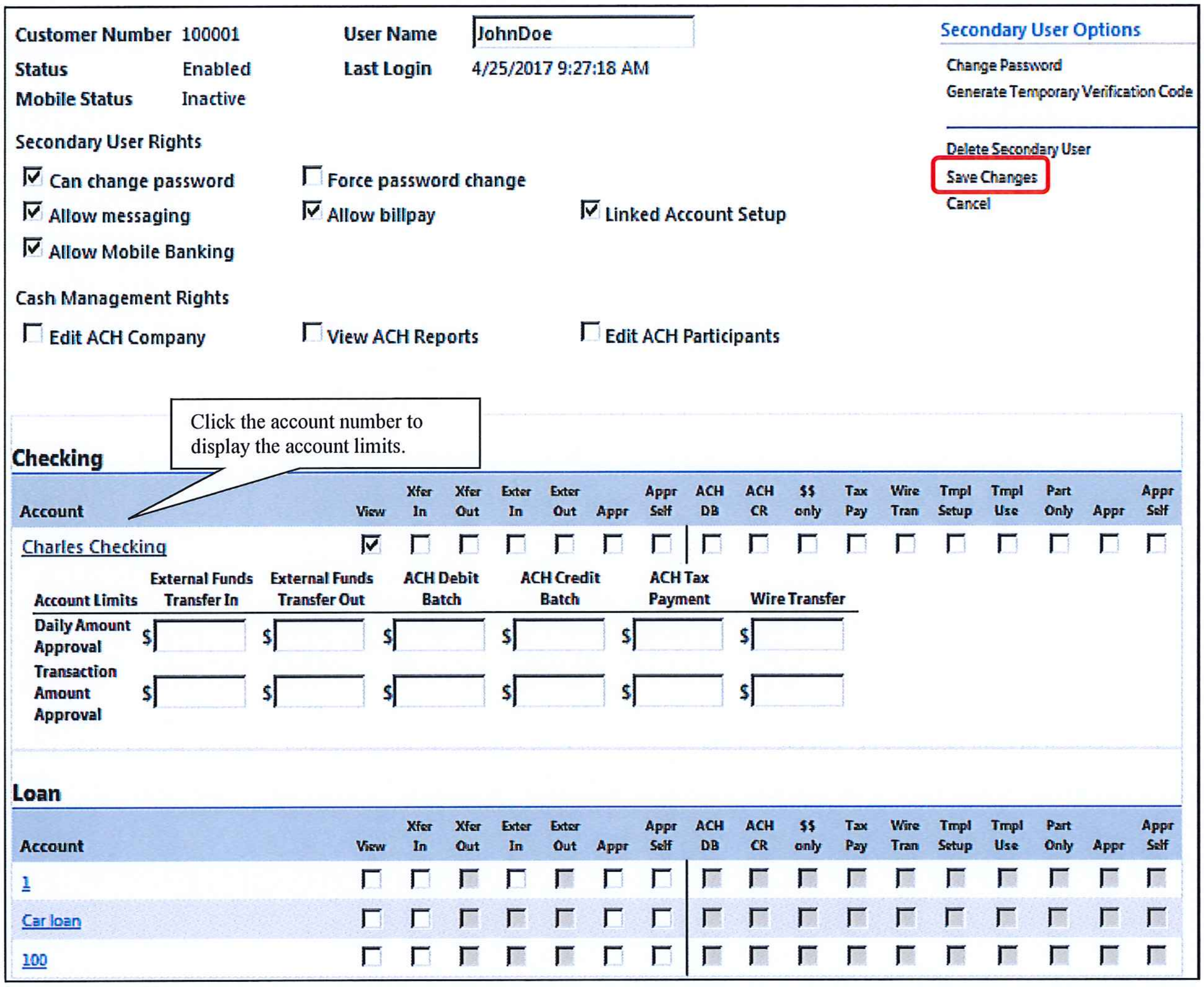
Create New Secondary User

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.

- Linked Account Setup – Secondary user has access to create linked accounts.
- Allow mobile banking – Secondary user has acess to mobile banking.
- User primary user's account friendly names – Indicates the accounts display the user friendly name established by the primary user.

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

Cash Management Rights Indicates which rights the secondary user has within cash management. *Options are:*

- Edit ACH Company
- View ACH Reports
- Edit ACH Participants

Account

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 in.

Exter Out Indicates if the secondary user is able to create external tranfers out.

Appr Indicates if the secondary user is able to approve external transfers for another user that fall under the account limits.

Appr Self Inidcates if the secondary user is able to approve their own external transfers under the account limits.

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

(The following items are specific to Cash Management.)

ACH DB Inidicates if the secondary user is able to create and edit ACH debit transactions.
NOTE: *This check box is not available if the '$$ Only' check box is selected.*

ACH CR

Indicates if the secondary user is able to create and edit ACH credit transactions.
NOTE: *This check box is not available if the '$$ Only' check box is selected.*

$$ only

Indicates if the secondary user is able to edit transaction amounts only for batches.

Tax Pay

Indicates if the secondary user is able to create tax payments.

Wire Tran

Indicates if the secondary user is able to create wire transfers for the account.

Tmpl Setup

Indicates if the secondary user is able to set up wire transfer templates.

Tmpl Use

Indicates if the secondary user is able use wire transfer templates.

Part Only

Indicates the secondary user can only use partipants that have been previously created.
NOTE: *The user can not have BOTH Edit ACH Participants and Part Only selected.*

Appr

Indicates if the secondary user is able to approve transactions for another user that fall under the account limits.

Appr Self

Inidcates if the secondary user is able to approve their own transactions under the account limits.

Account Limits

Daily Amount Approval

Indicates the daily amount the secondary user can approve or self approve for ACH debit/credit transaction batches, ACH Tax payments, and wire transfers.

Transaction Amount Approval

Indicates the per batch transaction amount the secondary user can approve for ACH debit/credit transaction batches, ACH tax payments, and wire transactions.
NOTES:

- *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.*

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. Select the Cash Management Rights as needed.
8. Check the account rights needed for each checking and/or savings account.
9. Click the checking and/or savings account number to enter approval amounts.
10. Click *Save Changes.*
11. 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 *Options* for the appropriate customer ID.
2. To edit, click *Edit Secondary User*. To delete, click *Delete Secondary User*.
3. If editing, make changes as needed and click *Save Changes*.
4. If deleting, click **Continue** to delete the secondary user.

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