

## 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
			<a href="#">Create New Secondary User</a>
			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

[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.

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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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	\$	\$	\$	\$											

- 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**

<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**.