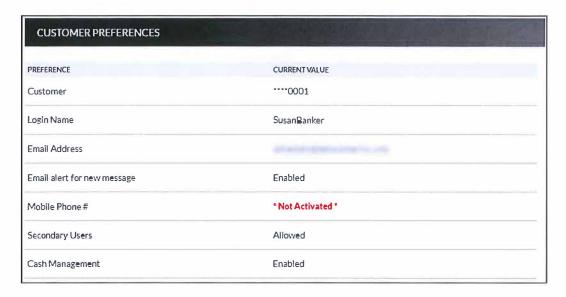
# **Preferences**

# **Security Options**

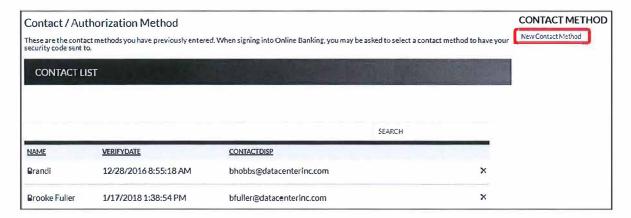
# Customer Preferences Preferences → Security Options → Customer Preferences

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

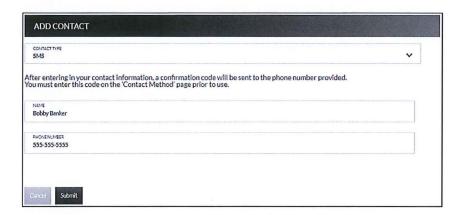


# Contact/Authorization Method Preferences → Security Options → Change Security Contact

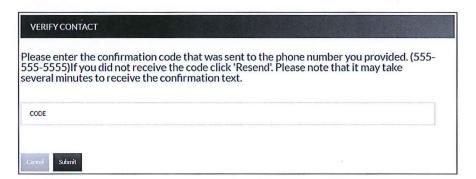
The Contact/Authorization Method screen displays contact methods that have been created.



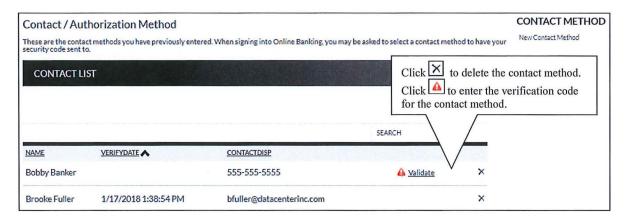
- 1. Click **New** or *New Contact Method* to create a new contact method.
- 2. Indicate the method for contact in the Contact Type field.
- 3. Enter a name in the Name field. This is only used to reference the contact method.
- 4. Enter the Phone Number, Email or Google Authenticator information.
-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



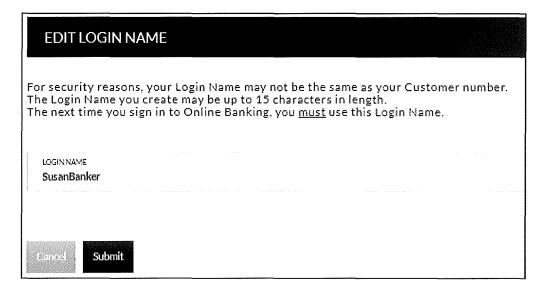
If **Cancel** was selected, the contact method can still be verified on the Contact/Authorization Method screen. Select  $\triangle$  to be returned to the Verify Contact screen.



### **Edit Login Name**

#### **Prefereces** → Security Options → Change Login Name

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

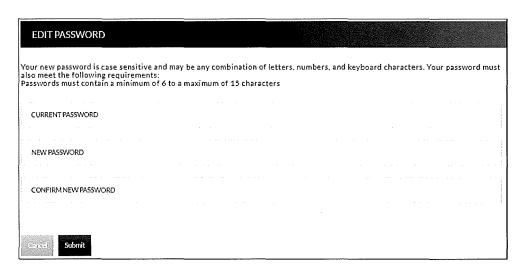


### **Change Password**

# 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.

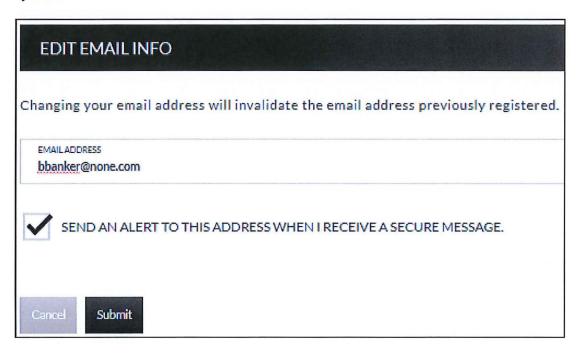


# **Internet Options**

#### **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.



#### **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 NAI	MES			
Checking				
Account #	Available Balance	Balance		
1	\$152,442.69	\$152,442.69	ACCOUNTNAME Charles Checking	SORT ORDER
Loan	Available Balance	Balance		
1	\$0.00	\$0.00	ACCCUNTNAME Boat Loan	SORTORDER 2
20	\$13.25	\$40,349.06	ACCOUNTNAME Mazda Loan	SORTORDER 3
100	\$6,000.00	\$7,000.00	ACCOUNT NAME *****963	SORTORDER 1
Carpell Submit				

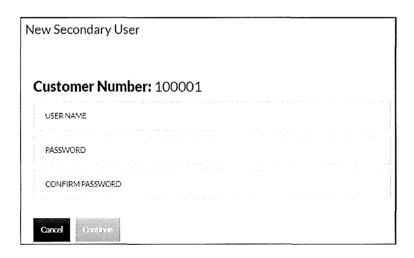
## **Secondary Users**

### 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		
CUSTOMERIO	CREATE DATE	<u>Last logged in</u>	ginion in continues,	
0001-779-brooke	10/09/2018 08:33 AM	10/10/2018 11:11 AM	<u>Edit</u>	
****0001-JohnBanker	07/24/2017 08:48 AM	04/17/2019 03:11 PM	<u>Edit</u>	

# Creating a New Secondary User Preferences $\rightarrow$ Internet Banking Options $\rightarrow$ Secondary Users $\rightarrow$ Create New Secondary User



Customer Number Customer number for the primary account owner.

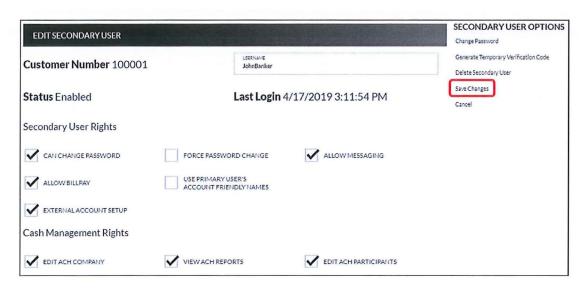
**User Name** User name for the secondary user.

**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.

1 <i>ccount</i>	TIP: Clic number/na account li	ame to a		the													
Checking L	7 /																
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	<b>\</b>	′ ✓		~	~	<b>Y</b>	Y		$\checkmark$	and the same of		<b>Y</b>		~		$\checkmark$	<b>✓</b>
Account Limits	Externa Transf			External Funds Transfer Out		ACH Debit Batch		ACH Credit Batch		ACH Tax Payment		Wire Transfer					
Daily Amount Approval	\$ 1000.00		100	\$ 1000.00			<b>. .</b>		\$		\$		\$				
Transaction Amount Approval	\$ 500.00		500	\$ 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 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.

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

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

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

OPT-IN AGREEMENTS								
		SEARCH						
NOTICE	<u>updated</u>	<u>STATUS</u>						
Account Changes	04/04/2018	Opted In on 04/04/2018						
E-Mail Address Registration	09/04/2012	Opted In on 03/06/2019						
<u>Test Notice</u>	01/31/2019	N/A						
POLICIES								
		SEARCH						
NOTICE	<u>UPDATED</u>	<u>STATUS</u>						
Card Chargeback Policy	06/08/2017	N/A						
Privacy Policy	06/26/2017	Accepted on 09/07/2018						