

Bank from Home

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How To Manage Delegates



[Online Guide](#)

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Introduction

Only an Authorized Officer can add, edit or remove a Business Delegate (i.e. bookkeeper) and setup their permissions through the online banking platform. This also extends to resetting their passwords when required.

Important: Only one Delegate can be active on a business account.

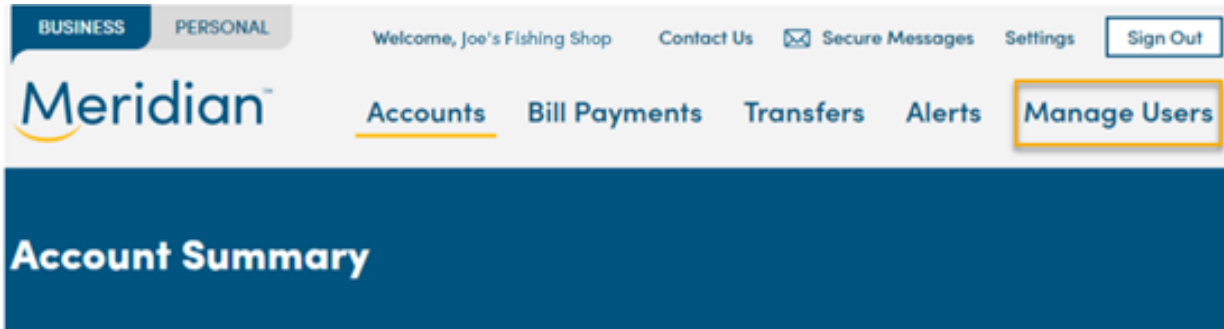
Below are the topics covered within this document for Delegate Management:

- Add a New Delegate and Setup Permissions
- Changing or Updating Delegate Information
- Resetting a Password
- Managing Active Statuses
- Removing a Delegate

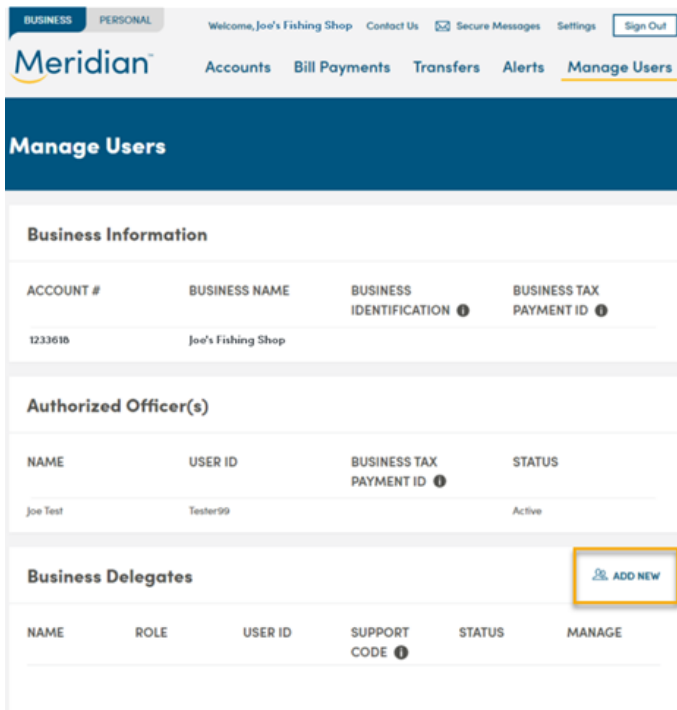
Part 1: Add a New Delegate and Set Up Permissions

Step 1: Manage Users

Once you have signed in to online banking, you will land on the *Account Summary* screen.



From here, navigate to the *Manage Users* option at the top of the page.



Step 2: Create New Delegates

On the *Manage Users* page, navigate to the *Business Delegates* section at the bottom of the page and click on the *Add New* button.

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Step 3: Add User Details and Setup Permissions

3.1 Navigate to the left side of the page to enter a new User ID and the Delegate's information onto the *User Details* section.

Note: The Support code field must be filled out for Delegates to be able to request support from Meridian, e.g. for transactions inquiries. Meridian uses this code to confirm the identity of the Delegate and to be able to support them with their inquiries. Delegates that are unable to provide their support code must be referred back to the Authorized Officer.

3.2 In the password field, click on the *Generate* button to generate a new temporary password for the Delegate.

3.3 Navigate to the right side of the page to setup permissions for the delegate. Review the specific actions listed and switch applicable permissions from OFF to ON.

3.4 Click on the *Next* button to finalize the Delegate's user profile.

The screenshot shows the 'Add User' form in the Meridian system. The form is divided into two main sections: 'User Details' on the left and 'Permissions' on the right. The 'User Details' section contains fields for User ID (Tester97), First Name (Terry), Last Name (Tester), Job Title (Bookkeeper), Email Address (terry.tester@test.ca), Home Phone, Work Phone (123 4567890 1107), Fax Phone, Support Code (with an information icon), and Password (2021008645). A 'GENERATE' button is located below the password field. The 'Permissions' section lists five permissions with toggle switches: e-Transfer Send (ON), e-Transfer Receive (OFF), Manage Bill Payee (OFF), Price Match (OFF), and M2M Transfer (OFF). At the bottom right, there are 'BACK' and 'NEXT' buttons. Numbered callouts (1-4) highlight the 'User Details' section, the 'GENERATE' button, the 'Permissions' section, and the 'NEXT' button respectively.

Section	Field/Action	Value/Status
User Details	User ID	Tester97
	First Name	Terry
	Last Name	Tester
	Job Title	Bookkeeper
	Email Address	terry.tester@test.ca
	Home Phone	Area: _____ Number: _____
	Work Phone	123 4567890 1107
	Fax Phone	Area: _____ Number: _____
	Support Code	Support Code
	Password	2021008645
Permissions	e-Transfer Send	ON
	e-Transfer Receive	OFF
	Manage Bill Payee	OFF
	Price Match	OFF
	M2M Transfer	OFF

Step 4: Complete Delegate Profile

Review the User Details and permissions before completing the profile to ensure all information has been entered correctly.

Tip: If any information requires changes, the Edit button is available for use.

If there are no changes, click on the **Add** button to complete the delegate's user profile.

The screenshot shows the Meridian 'Add User' interface. At the top, there is a navigation bar with the Meridian logo and menu items: Accounts, Bill Payments, Transfers, Alerts, and Manage Users. Below this is a dark blue header with the text 'Add User'. The main content area is divided into two columns. The left column is titled 'Review User Details' and contains the following information: User ID: Tester97, First Name: Terry, Last Name: Tester, Job Title: Bookkeeper, Email Address: terry.testster@test.ca, Home Phone: (blank), Work Phone: (123) 456-7890 Ext: 1107, Fax Phone: (blank), Status: (blank), Support Code: Ax12 (with an information icon), PFS ID: (with an information icon), and Temporary Password: 2021008645. An 'EDIT' button with a pencil icon is located to the right of the 'Review User Details' section. The right column is titled 'Permissions' and contains five rows, each with a label and a toggle switch: e-Transfer Send (ON), e-Transfer Receive (OFF), Manage Bill Payee (OFF), Price Match (OFF), and M2M Transfer (OFF). At the bottom of the interface, there is a yellow bar with a 'CANCEL' button and an 'ADD' button. A blue circle with the number '5' is positioned above the 'ADD' button, which is highlighted with a yellow box.

Manage Users



User successfully added!



Business Information

ACCOUNT #	BUSINESS NAME	BUSINESS IDENTIFICATION ⓘ	BUSINESS TAX PAYMENT ID ⓘ
1233618	Joe's Fishing Shop		

Authorized Officer(s)

NAME	USER ID	BUSINESS TAX PAYMENT ID ⓘ	STATUS
Joe Test	Tester99		Active

Business Delegates

ADD NEW


NAME	ROLE	USER ID	SUPPORT CODE ⓘ	STATUS	MANAGE
Terry Tester	Bookkeeper	Tester97	Ax12	Active	

When a Delegate has been successfully added, you will automatically return to the *Manage Users* page and receive a confirmation message as well as the new Delegate being displayed in the *Business Delegates* section.

At this point, the Delegate is now able to log into the online banking platform using their new User ID and temporary password.

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Part 2: Changing Or Updating Delegate Information

Manage Users					
Business Information					
ACCOUNT #	BUSINESS NAME	BUSINESS IDENTIFICATION ⓘ	BUSINESS TAX PAYMENT ID ⓘ		
1233618	Joe's Fishing Shop				
Authorized Officer(s)					
NAME	USER ID	BUSINESS TAX PAYMENT ID ⓘ	STATUS		
Joe Test	Tester99		Active		
Business Delegates ADD NEW					
NAME	ROLE	USER ID	SUPPORT CODE ⓘ	STATUS	MANAGE
Terry Tester	Bookkeeper	Tester97	Ax12	Active	

Step 1: Manage Users


Note: Permissions can be changed at any time by the Authorized Officer.

Once you have signed in to online banking, navigate to the *Manage Users* page.

From the *Manage Users* page, navigate to the **Business Delegates** section and select the Delegate that is to be updated or changed by clicking on the corresponding pencil and paper icon (*Edit* icon) located beneath the Manage column.

Terry Tester ▼ Select an Action ▼

User Details



User ID: Tester97
 First Name: Terry
 Last Name: Tester
 Job Title: Bookkeeper
 Email Address: terry.testster@test.ca
 Home Phone:
 Work Phone: (123) 456-7890 Ext: 1107
 Fax Phone:
 Status: Active
 Support Code: Ax12
 PFS ID:

Permissions

e-Transfer Send ON
 e-Transfer Receive OFF
 Manage Bill Payee OFF
 Price Match OFF
 M2M Transfer OFF

BACK SAVE


Step 2: Edit Users Profile

You will be brought to the Delegate's user profile.

Click on the *Edit* button.

Terry Tester ▼ Select an Action ▼

User Details



1

First Name:
 Last Name:
 Job Title:
 Email Address:
 Home Phone:
 Work Phone:
 Fax Phone:
 Status:
 Support Code:

Permissions

e-Transfer Send ON
 e-Transfer Receive OFF
 Manage Bill Payee OFF
 Price Match ON
 M2M Transfer OFF

2

BACK SAVE

All fields will become editable and permissions will be able to be changed at this point.

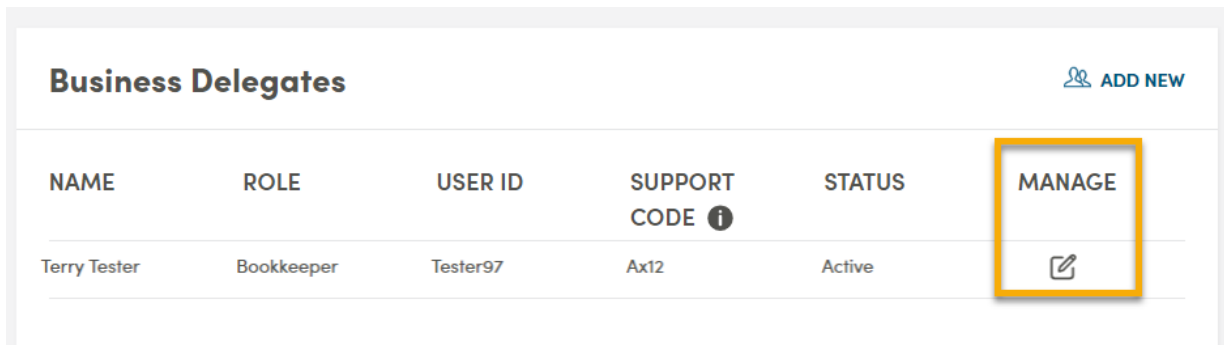
Apply your changes and click the *Save* button.

Part 3: Reset a Password


Step 1: Manage Users

Note: If a Delegate is locked out of the account due to password issues, only the Authorized Officer who setup the Delegate can unlock the account.

From the *Manage Users* page, navigate to the *Business Delegates* section and click on the pencil and paper icon (*Edit* icon) located beneath the Manage column.



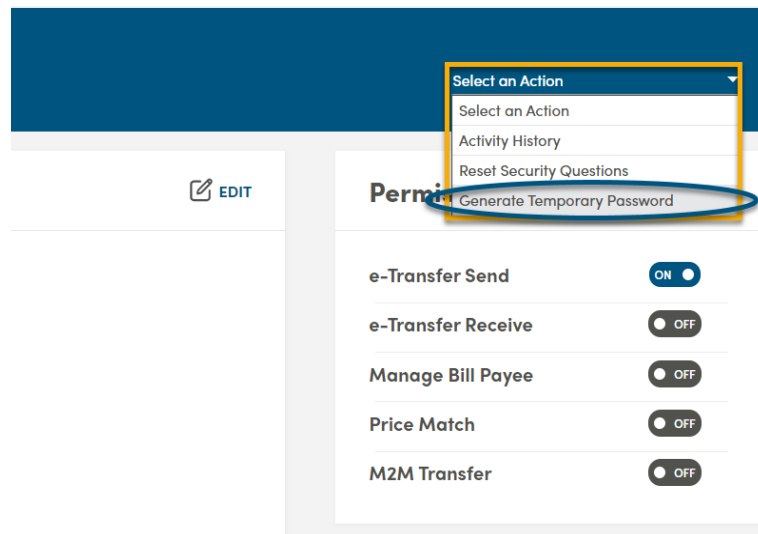
The screenshot shows a table titled "Business Delegates" with a header row and one data row. The header row has columns for NAME, ROLE, USER ID, SUPPORT CODE (with an info icon), STATUS, and a MANAGE column. The data row contains the name Terry Tester, role Bookkeeper, user ID Tester97, support code Ax12, and status Active. The MANAGE column contains a pencil and paper icon. A yellow box highlights the MANAGE column header and the icon below it.

NAME	ROLE	USER ID	SUPPORT CODE ⓘ	STATUS	MANAGE
Terry Tester	Bookkeeper	Tester97	Ax12	Active	

Step 2: Trigger Temporary Password Generator

Navigate to the right side of the Delegate's profile and click on the *Select an Action* drop down menu.

From the drop down menu, select the *Generate Temporary Password* option.



Generate temporary password

Please verify the user details below and click continue to generate a temporary password.

User details

User ID: Tester97
First Name: Terry
Last Name: Tester

CANCEL

CONTINUE

Step 3: Generate Temporary Password

Review the User Details to ensure the correct user has been selected for the password generation.

If the user details are correct, click on the *Continue* button.

Generate temporary password

✔ Completed Successfully

User details

User ID: Tester97
Temporary password: 82197258

BACK TO USER DETAILS

Step 4: Provide Temporary Password

The page will refresh and will confirm that the action has been completed successfully.

The Delegate can be provided with the new temporary password to re-access the online banking platform.

To leave the page, click on the *Back to User Details* button.

Part 4: Managing Active Statuses

Authorized Officer(s)			
NAME	USER ID	BUSINESS TAX PAYMENT ID ⓘ	STATUS
Joe Test	Tester99		Active

Business Delegates					ADD NEW
NAME	ROLE	USER ID	SUPPORT CODE ⓘ	STATUS	MANAGE
Terry Tester	Bookkeeper	Tester97	Ax12	Active	

Step 1: Manage Users

If a Delegate is going to be away for an extended period of time, The Delegate's access can be set to "Inactive" until they return. This also can apply in instances where you wish to add or assign another delegate to the online banking platform.

From the Manage Users page, navigate to the Business Delegates section and click on the pencil and paper icon (Edit icon).

Reminder: Only one Delegate can be active on the account

Terry Tester Select an Action

User Details

1 EDIT

First Name: Terry
Last Name: Tester
Job Title: Bookkeeper
Email Address: terry.test@test.ca
Home Phone: 123 456-7890
Work Phone: 123 4567890 1107
Fax Phone: Area Number
2 Status: Active
Support Code: ⓘ
Active
Inactive
Closed

Permissions

e-Transfer Send ON
e-Transfer Receive OFF
Manage Bill Payee OFF
Price Match OFF
M2M Transfer OFF

3 BACK SAVE

Step 2: Update the First and Second Delegates Active Statuses

On the Delegate's profile, click on the *Edit* button.

Navigate to the *Status* drop down menu and change the status from "Active" to "Inactive".



Click on the *Save* button to save changes.

To add a replacement delegate, refer to the [Add a New Delegate and Setup Permissions](#) process.



When another Delegate is added, both Delegates will appear within the *Business Delegates* section on the *Manage Users* page and will display their status.

Upon the first Delegate's return, follow Steps 1 and 2 to update the second Delegate's status to "Inactive" and the first Delegate's status to "Active".

Change of Active Status from Delegate 1 to Delegate 2:

Business Delegates ADD NEW					
NAME	ROLE	USER ID	SUPPORT CODE ⓘ	STATUS	MANAGE
John Tester	Bookkeeper	Tester98	AB1234	Active	
Terry Tester	Bookkeeper	Tester97	Ax12	Inactive	

Change of Active Status from Delegate 2 to Delegate 1:

Business Delegates ADD NEW					
NAME	ROLE	USER ID	SUPPORT CODE ⓘ	STATUS	MANAGE
John Tester	Bookkeeper	Tester98	AB1234	Inactive	
Terry Tester	Bookkeeper	Tester97	Ax12	Active	

Part 5: Removing a Delegate

Step 1: Update the Delegates Active Status

In order to remove a Delegate, navigate to the Delegate's user profile.

Change the Status drop down menu from "Active" to "Closed".

Click on the *Save* button.

The screenshot shows the user profile for Terry Tester. The 'User Details' section includes fields for First Name, Last Name, Job Title, Email Address, Home Phone, Work Phone, and Fax Phone. The 'Status' dropdown menu is open, showing options: Active, Inactive, and Closed. A blue arrow points to 'Closed'. A yellow box highlights the 'Status' field with a '1' in a circle. Another yellow box highlights the 'SAVE' button with a '2' in a circle.

At the bottom of the *Manage Users* page, there will be a new *Show Closed Users* option displayed in the *Business Delegates* section.

This will keep a listing of all closed user profiles and can be displayed at any time.

The screenshot shows the 'Business Delegates' section. A yellow box highlights the 'SHOW CLOSED USERS' button. Below is a table with columns: NAME, ROLE, USER ID, SUPPORT CODE, STATUS, and MANAGE. The table contains one row for John Tester.

NAME	ROLE	USER ID	SUPPORT CODE	STATUS	MANAGE
John Tester	Bookkeeper	Tester98	AB1234	Inactive	