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.

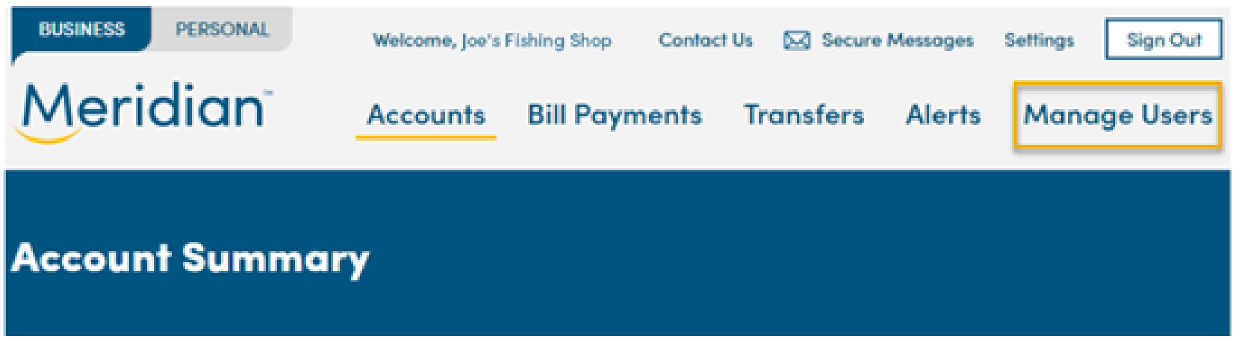
Below are the topics covered within this document for Delegate Management:

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

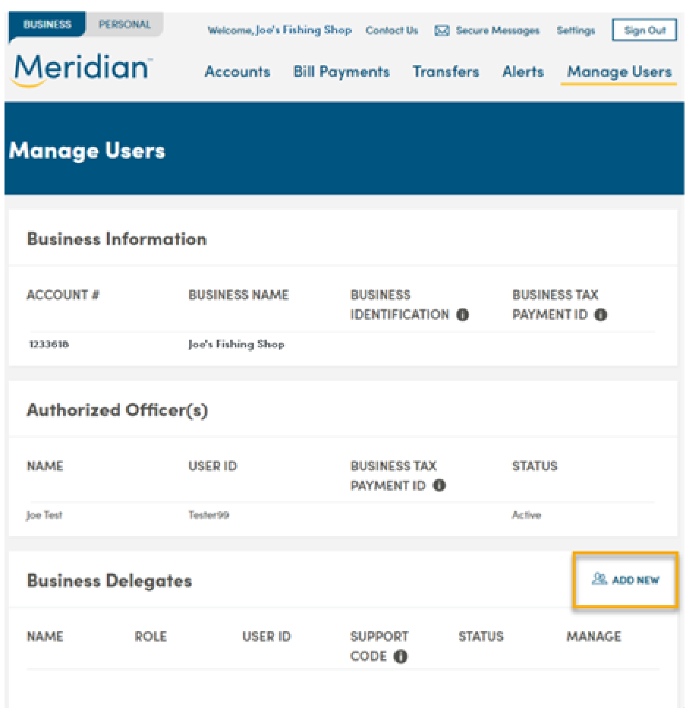
Part 1: Add a New Delegate and Set Up Permissions

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.

Step 3: Add User Details and Setup Permissions

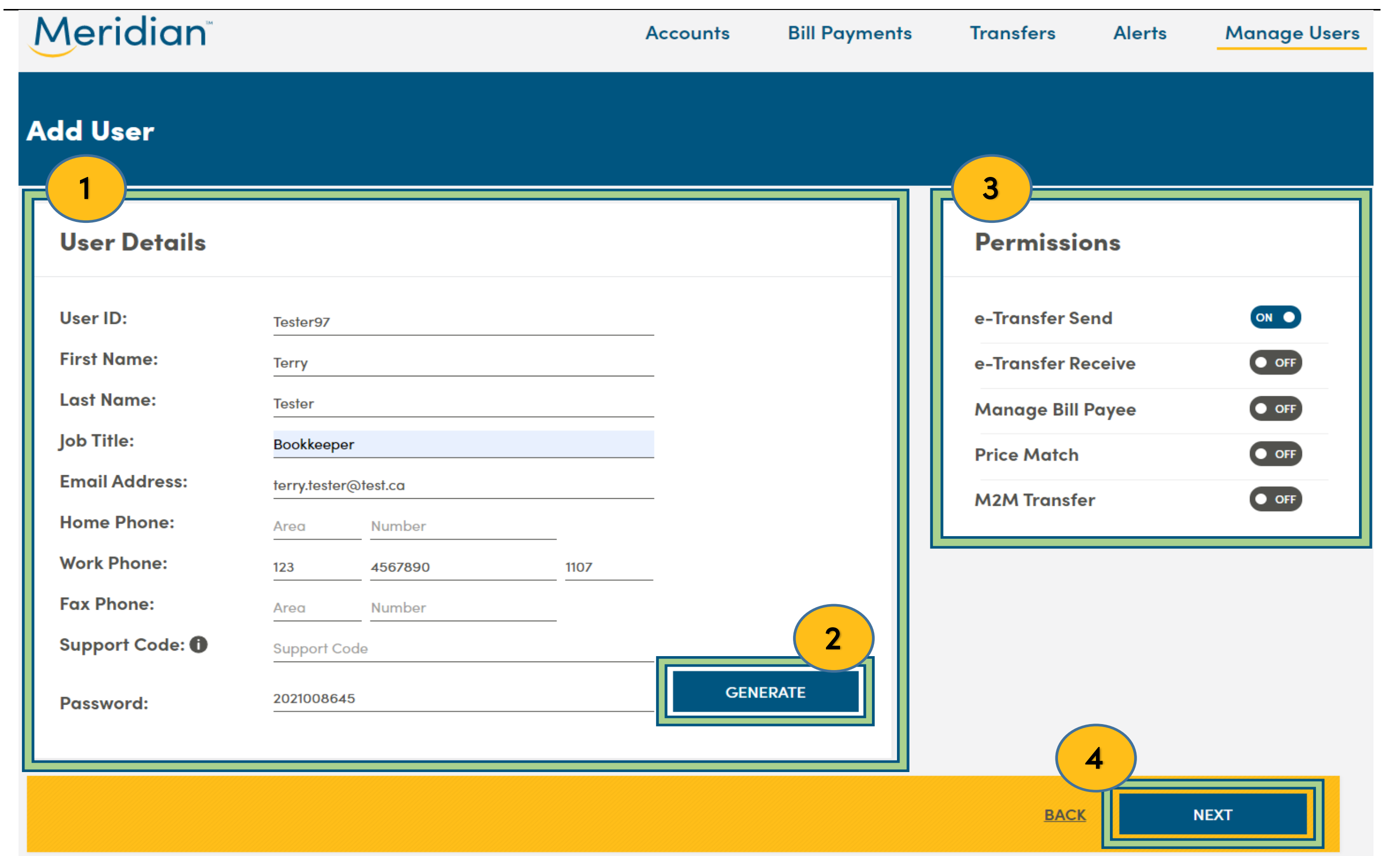
3.1 Navigate to the left side of the page to enter a new User ID and the Delegate's information onto the *User Details* section.

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.

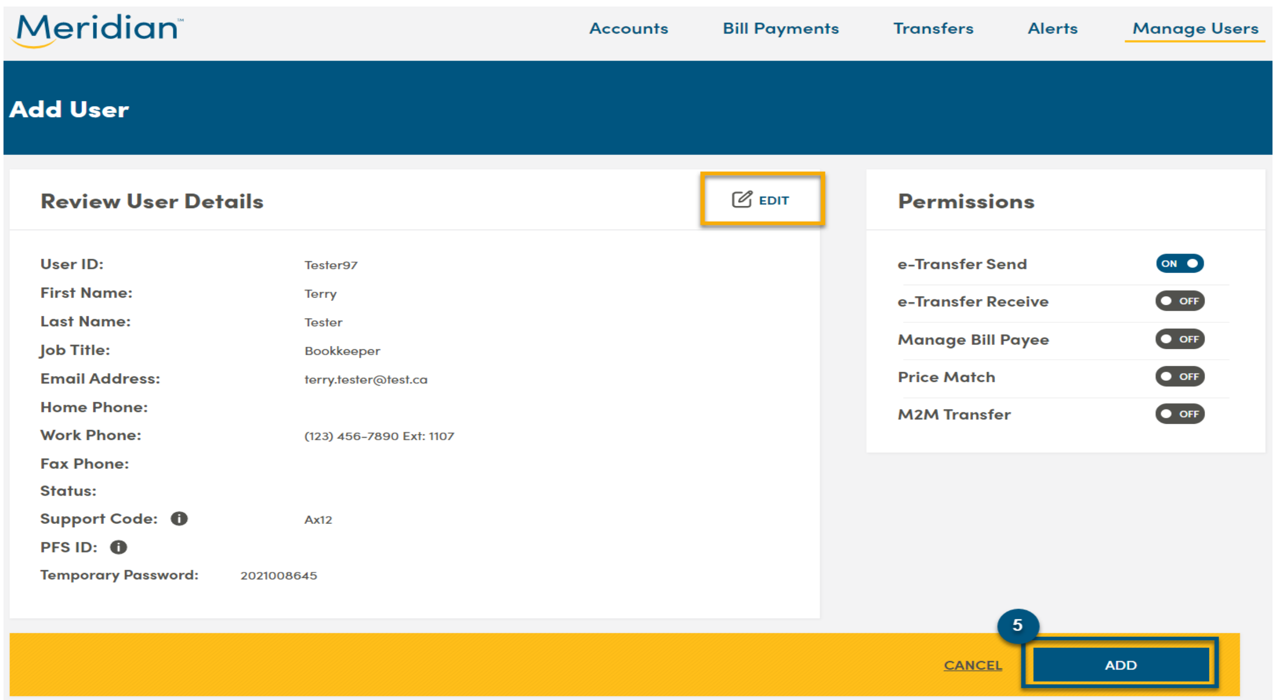


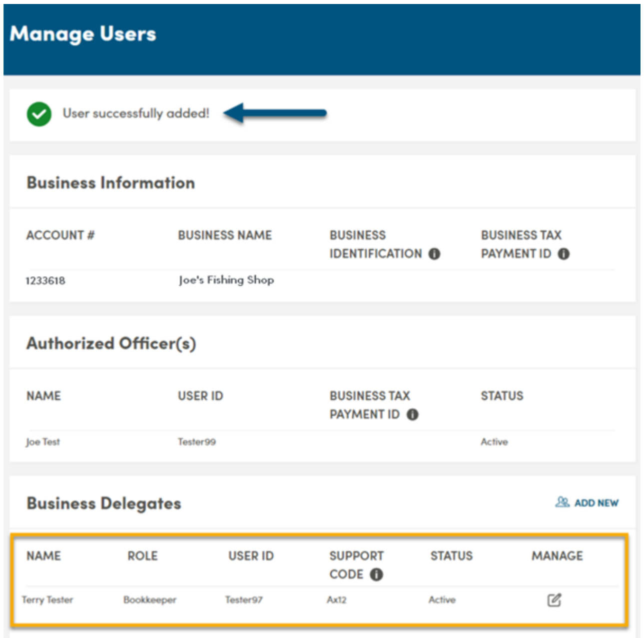
Step 4: Complete Delegate Profile

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.

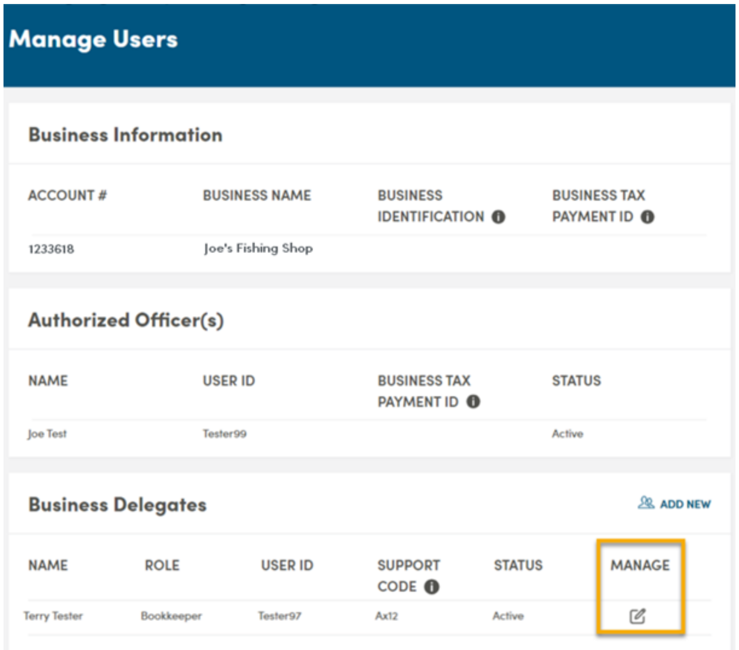




When a Delegate has been successfully added, you will automatically return to the *Manage Users* page and receive a confirmation message as well as the new Delegate being displayed in the *Business Delegates* section.

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

Part 2: Changing Or Updating Delegate Information



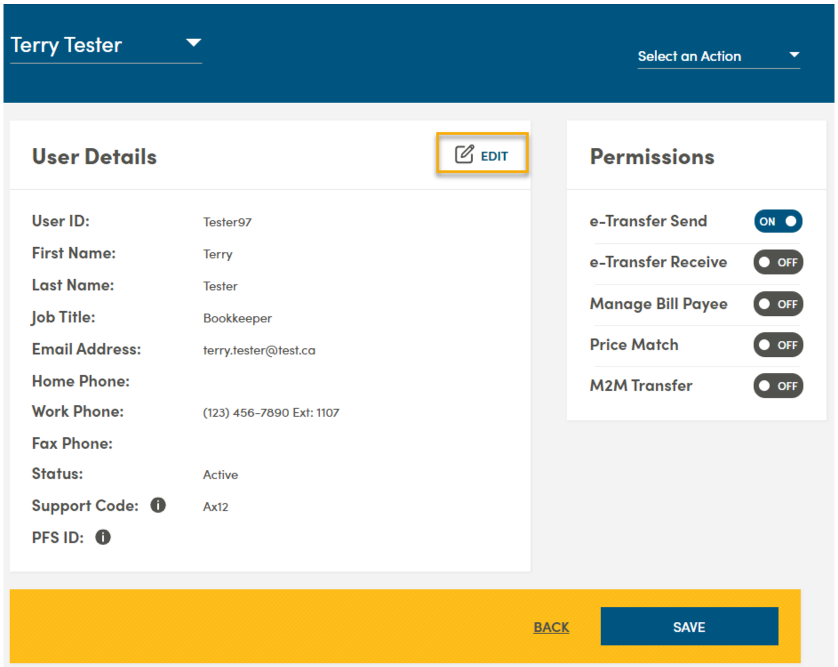
Step 1: Manage Users

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.

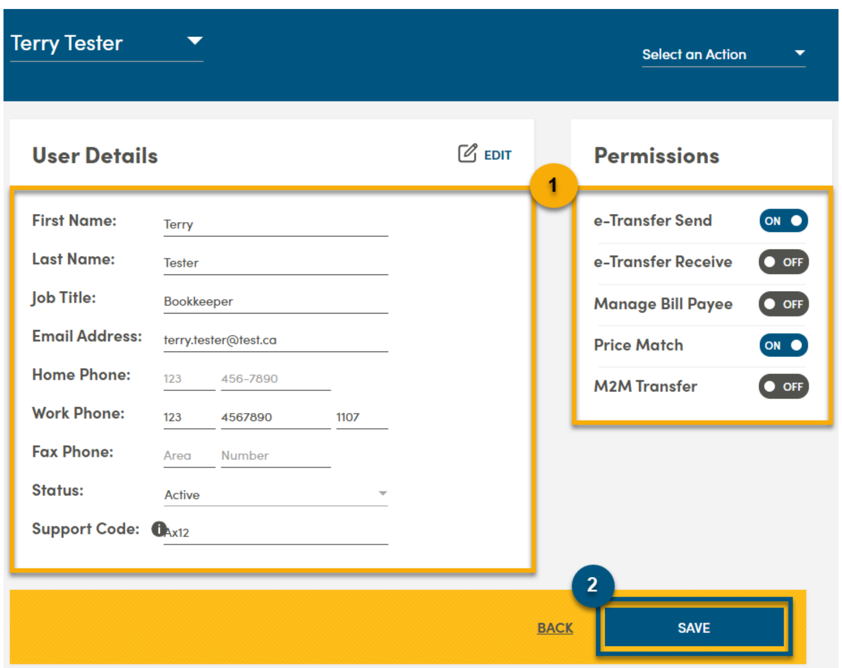
From the *Manage Users* page, navigate to the Business Delegates section and select the Delegate that is to be updated or changed by clicking on the corresponding pencil and paper icon (*Edit* icon) located beneath the Manage column.

Step 2: Edit Users Profile



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

Click on the *Edit* button.



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

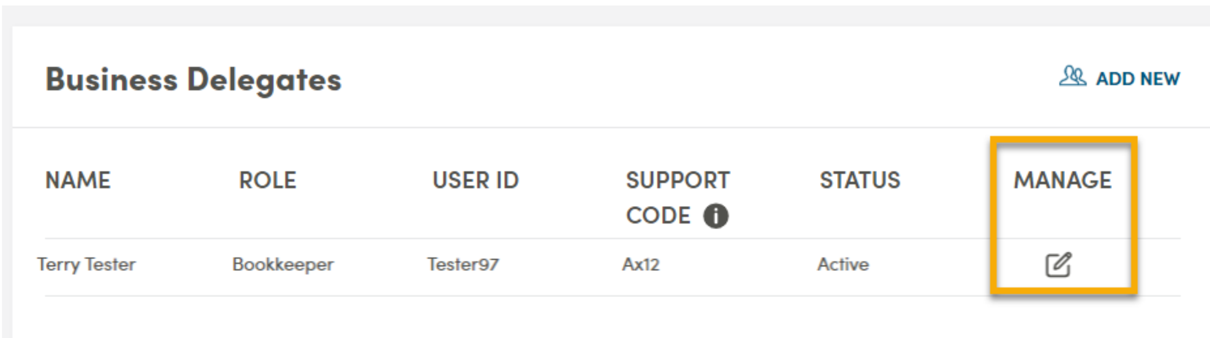
Apply your changes and click the *Save* button.

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.

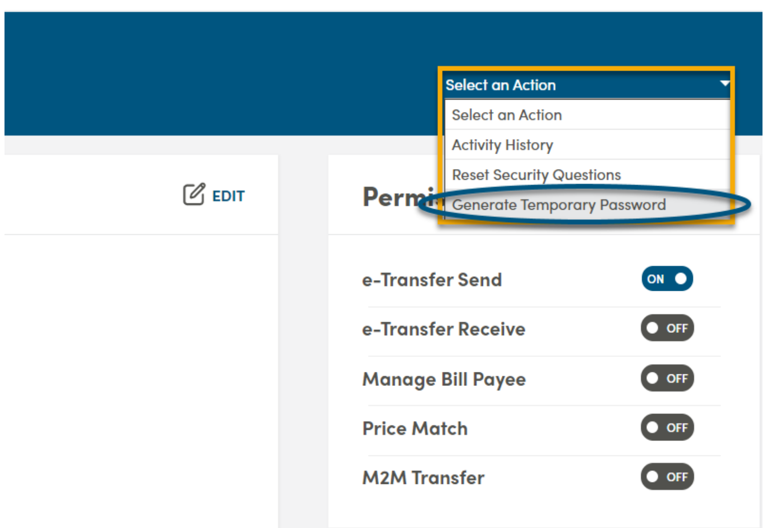
From the *Manage Users* page, navigate to the *Business Delegates* section and click on the pencil and paper icon (*Edit* icon) located beneath the Manage column.

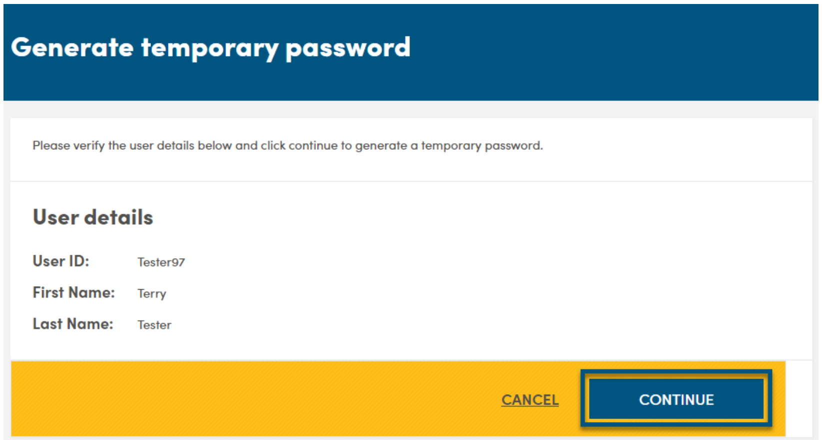


Step 2: Trigger Temporary Password Generator

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.

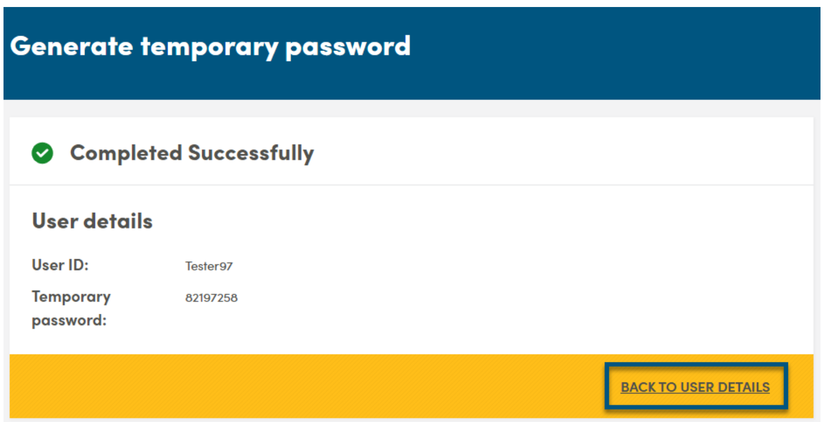




Step 3: Generate Temporary Password

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.



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.

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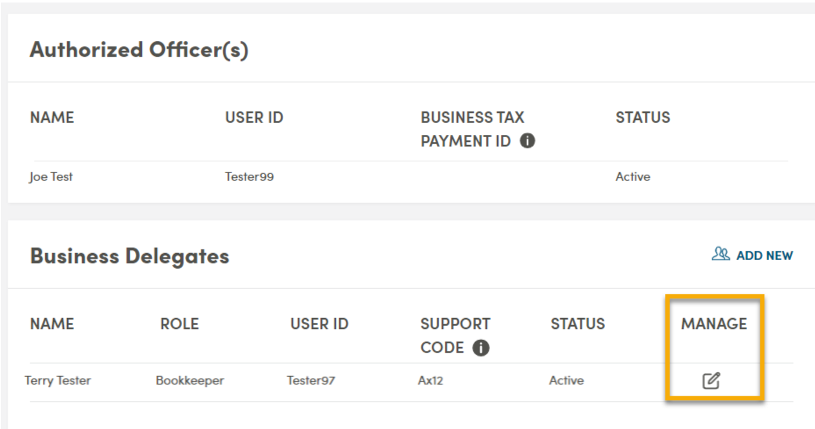
Part 4: Managing Active Statuses

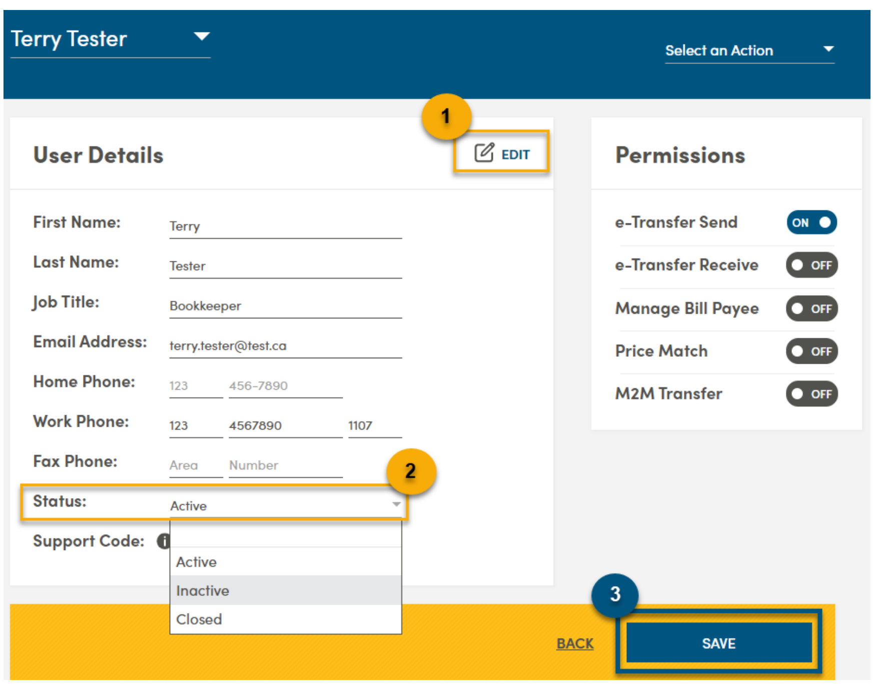


Step 1: Manage Users

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



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.

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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	

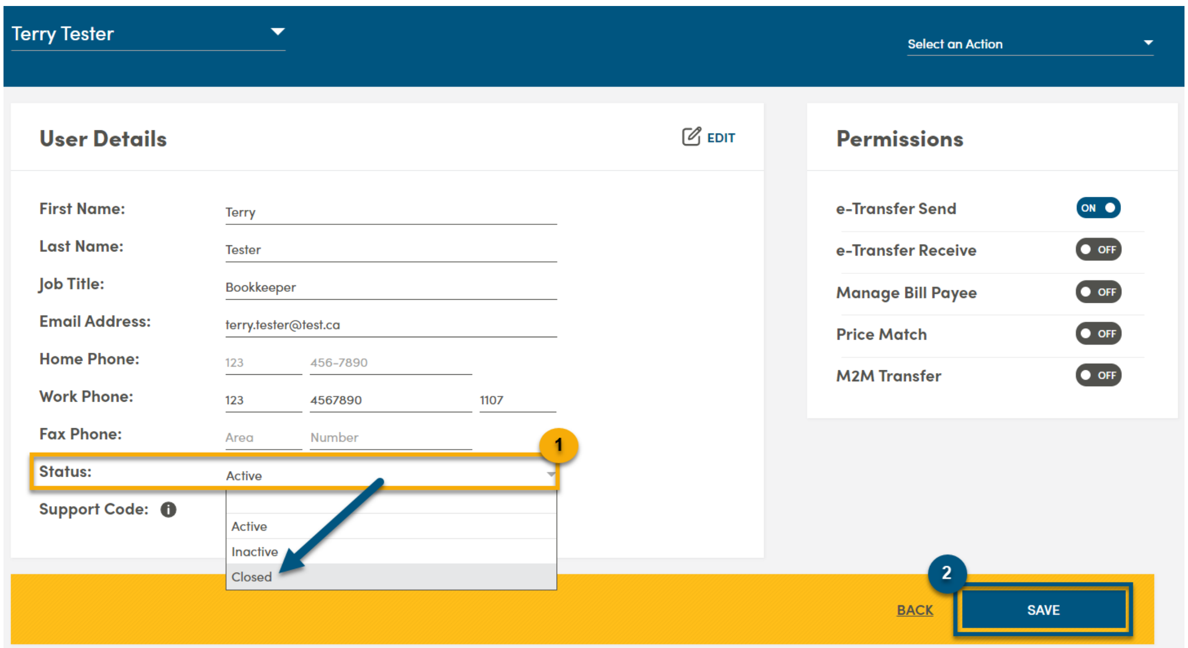
Part 5: Removing a Delegate

Step 1: Update the Delegates Active Status

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

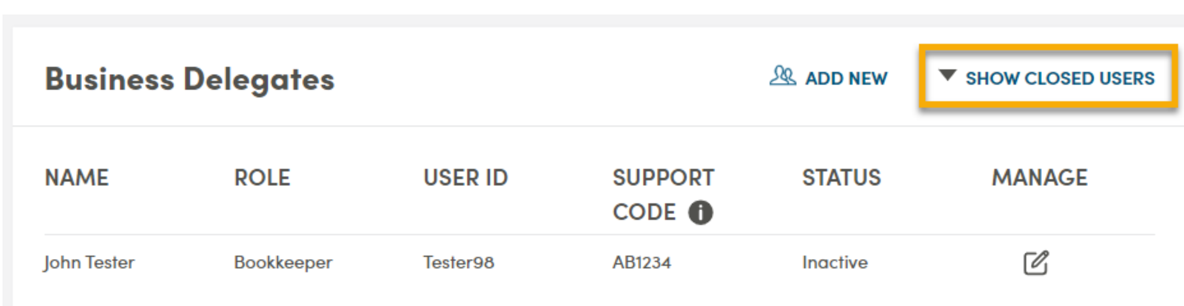
Change the Status drop down menu from "Active" to "Closed".

Click on the *Save* button.



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.



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