Bill Pay

Sub-user Permissions

Ver 1. [9/21]

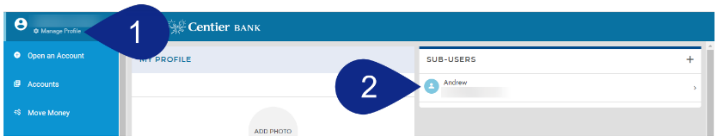
Bill Pay Sub-Users and Permission

Centier Digital Banking users can share their account access with others. Bill Pay offers enhanced security provisioning. Follow the steps below for instructions on adding sub-users and granting Bill Pay permissions.

Share Account Access

1. Click **Manage Profile** in the main menu

2. Locate the **Sub-Users** area and click the **+** button.



3. If you have already added sub-users, you can copy their information by clicking the **Copy Everything From** field and selecting their **name** from the list. Add any information that is not auto populated.

4. Click the **Full Name** field and enter their name.

5. Click the **Email Address** field and enter their sub-user's email address.

6. Click the **Display Name** field and enter the name you would like to display under the Sub-Users area.

7. Click the **Invite Answer** field to enter the answer you would like them to enter when validating their access. The sub-user will receive an email requesting they click a link; they will then add the answer you've added. Communicate the answer with them before finishing this process so they know what they should answer. **They have 24 hours to respond.**

8. Click the **Admin Sub-User** circle to allow the individual to give them permission to operate as an admin. This gives them the ability to edit, add, and delete sub-users.

9. Click the **Give All Owner's Accounts** circle to give the sub-users access to all banking accounts, including permissions and limits for those accounts. Do not click option if you want to give the sub-user access to specific accounts. You will select specific accounts in **step 12**.

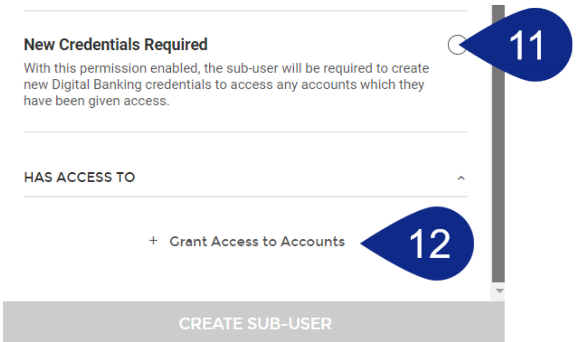
10. Click the **Can Modify Transaction Category Name** circle to give the sub-user the ability to add and modify categories assigned to account transactions.

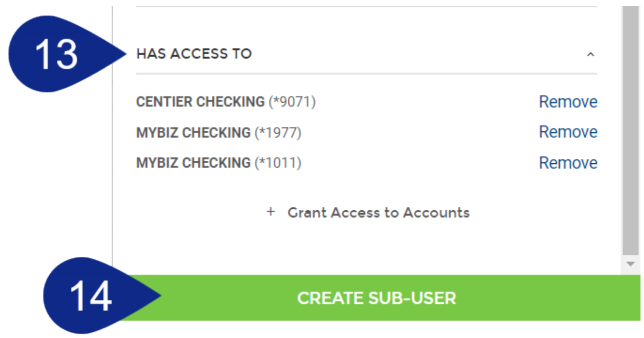
11. The **New Credentials Required** circle will be selected. It requires sub-users create new Digital Banking credentials to access any accounts which they have been given access.

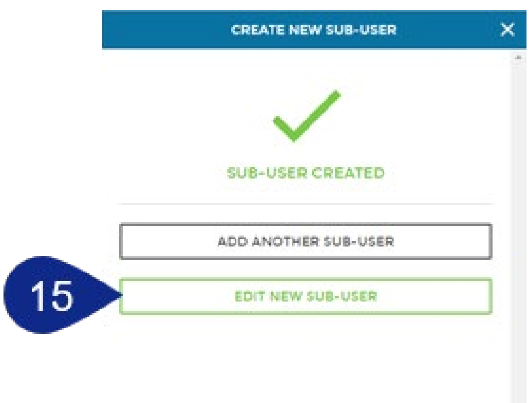
12. Click the **+ Grant Access to Accounts** link. It will generate a pop-up window. Select the checkboxes to indicate which accounts you would like the sub-user to be able to access.

13. The selected accounts will display under the **Has Access To** title.

14. When you are satisfied with your chosen settings, click **Create Sub-User**.

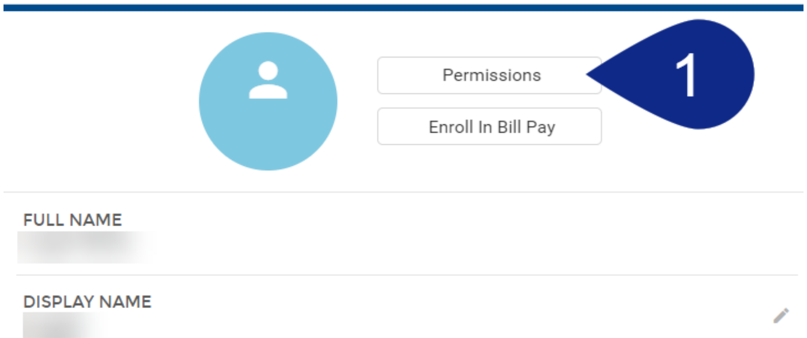




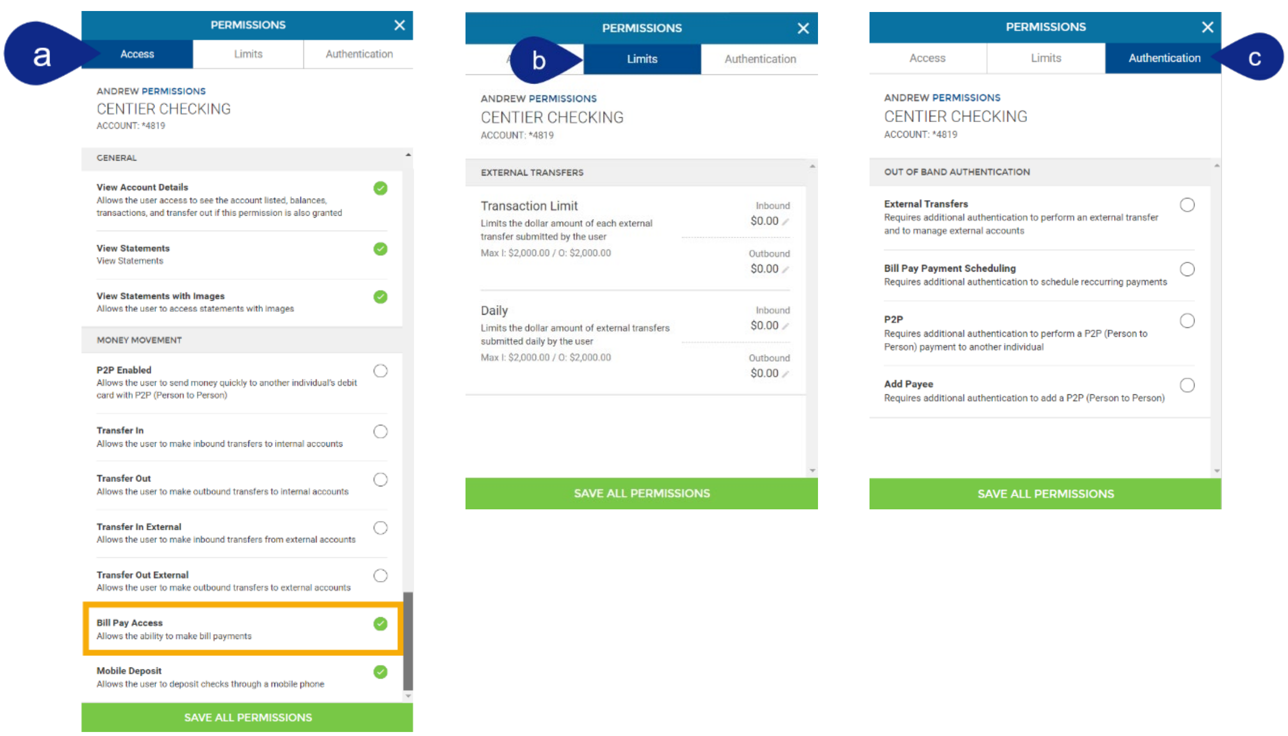


REMINDER: The sub-user you created will receive an email requesting they click a link; they will then add the answer you've added. Communicate the answer with them before finishing this process so they know what they should answer. **They have 24 hours to respond.** Once your sub-user logs in, they can go to Move Money, then Pay a Bill to get started.

Set Access Permissions



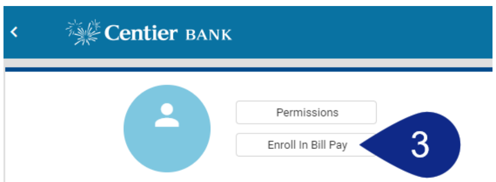
a. Use the **Access** tab to select the features and access the Sub-User can access by clicking the toggles. Be sure Bill Pay is selected.
b. Click the **Limits** tab to add dollar amount limits to external transactions.
c. The **Authentication** tab allows you to select features that should prompt Sub-Users identity authentication. This means they would be prompted to add a code to verify themselves when accessing selected features.



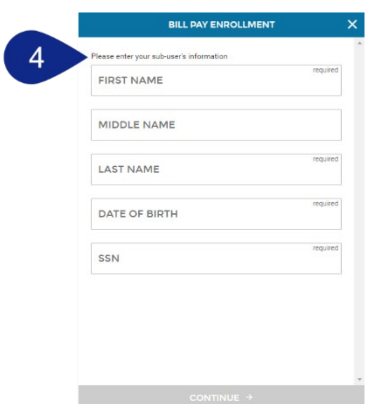
Enroll Bill Pay Sub-User

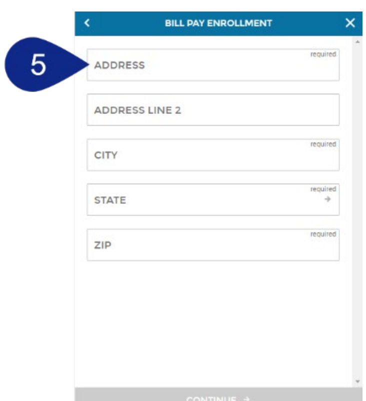
1. Click **Manage Profile** below your name.
2. Select your **Sub-User** from the list located in the top-right.

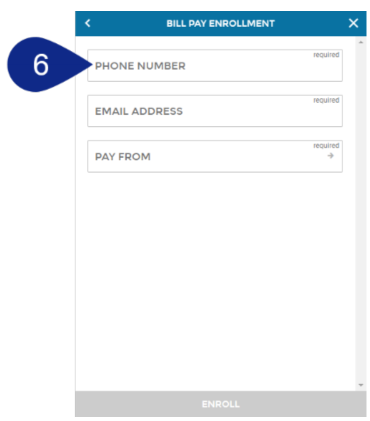
3. Click the **Enroll in Bill Pay** button.

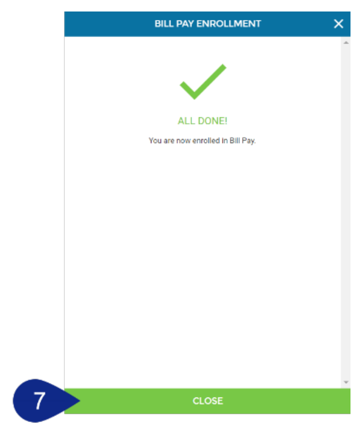


4. Add their information into the **Enrollment Form**, starting with Personal Information. Click **Continue** to move to the next section.
5. Add their **Address Information** to the form, then click **Continue**.
6. Add their Contact Information to the form. Click the **Pay From** account field, to select the **account** that should be used to pay bills, then click **Enroll.**
7. You will see a confirmation screen. Click **Close**.





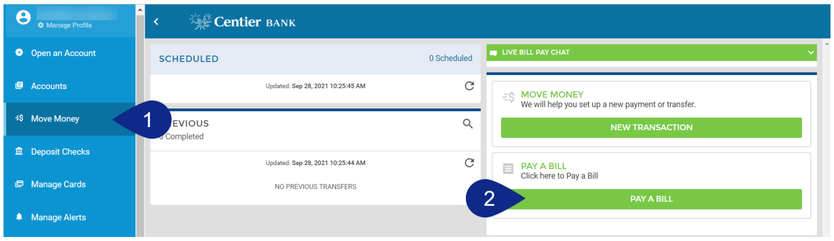




Bill Pay Sub-User Permissions

1. Click **Move Money** from the main menu.

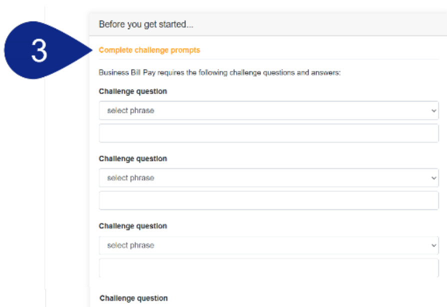
2. Click **Pay A Bill** on the right-side of the screen.

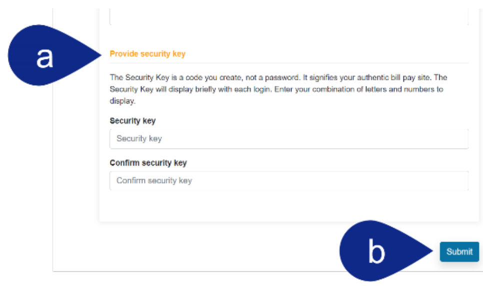


3. For enhanced security you will need to set **Challenge Questions** and **Answers**.

   a. Create and confirm a **Security Key**.

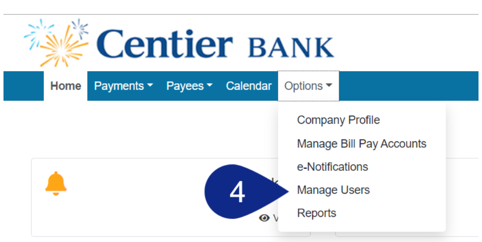
   b. Click **Submit** when you are done.

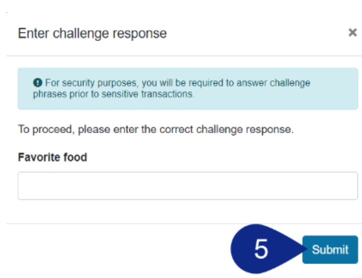




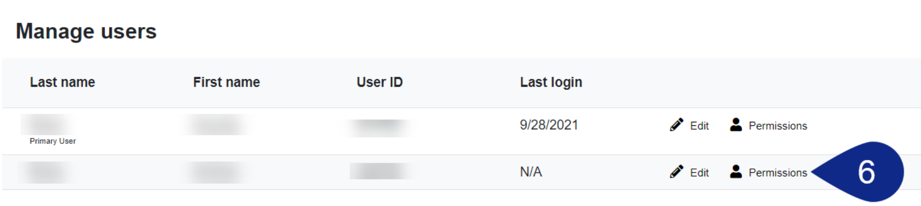
4. This will load a new page. Hover over **Options** and select **Manage Users**.

5. You will be asked to **answer** one of your challenge questions.

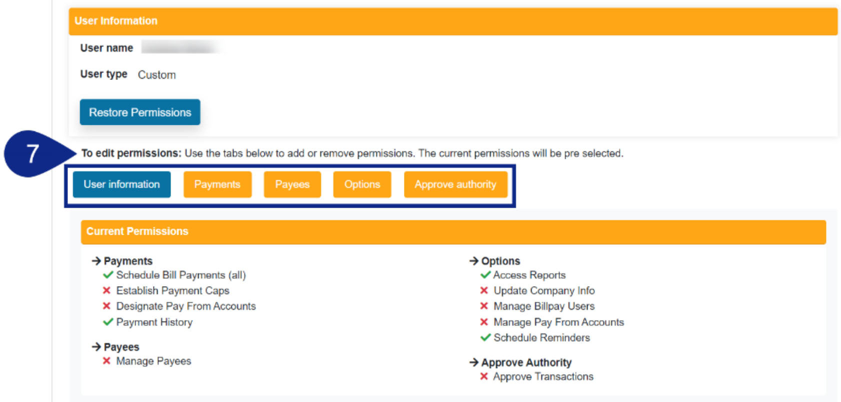




6. Select **Permissions** beside to the right of the person's name who needs permissions.



7. Select the buttons under the **To edit permissions:** to access permission options.



8. See the **Payments** example. Click the **toggles** to enable or disable permissions.

    a. Some permissions may include **tabs**. Select them to customize your permissions.

    b. Others may include payment caps (limits). Use the **text boxes** to add your limits.

    c. When you are done with each section, click **Save**.