DIGITAL BANKING

QUICK GUIDE

SHARED ACCESS

ADDING AND DELETING USER ACCESS

ADDING A SHARED ACCESS USER

1. Hover over **Tools**

2. Click **Settings**

3. Click the **Shared Access** tab

4. Click **+ Add a user**

No shared access users

Shared Access allows users certain access to your TRUE Community Credit Union accounts. Based off the permissions you set, users you add can: view, transfer to, transfer from, or pay bills. Click below to add users and set permissions for your TRUE Community Credit Union accounts. .

+ Add a user

5. Type the **First Name, Last Name and the Email Address** of the individual that is being given access

Add a new user

First Name	Enter first name
Last Name	Enter last name
Email Address	Enter email address
Confirm Email Address	Enter email address

6. **Choose the permissions** that are being given to the individual for each share or loan

Choose permissions

	All permissions	View account	View Transactions	Transfer into	Transfer from	Pay bills
Checking - 1 account	☐	☑	☑	☑	☑	☐
JUST CHECKING ****570-0110	☐	☑	☑	☑	☑	☐

7. Select **Save**

8. **Check the box** acknowledging and confirming the settings that were created (this will send an email to the individual)

Confirm and invite user

Jane Doe - jdoe@trueccu.com will be given access to the following accounts:

Checking - 1 accounts	View account	View Transactions	Transfer into	Transfer from	Pay bills
JUST CHECKING ****570-0110	●	●	●	●	

- Jane Doe will be sent an email invitation to access your accounts.
- A confirmation code will be given to you to share with Jane Doe. This code will expire in 24 hours.
- Jane Doe will then be able to access your accounts with their own username and password.

☐ I acknowledge one or more of the settings selected will allow the invitee to transfer money from my account/accounts.
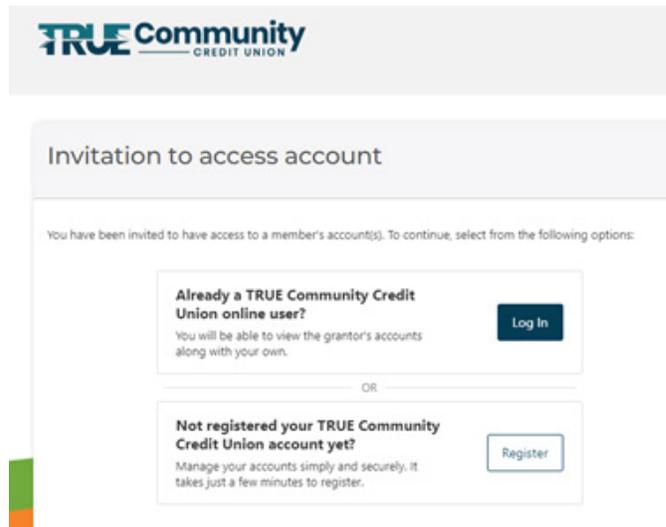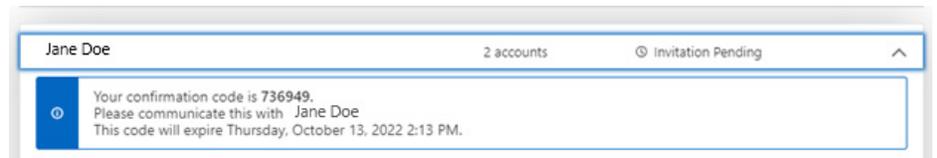
Confirm   Cancel

9. An **email will be sent** to the individual being given access with a link to our Digital Banking platform to sign up or sign in
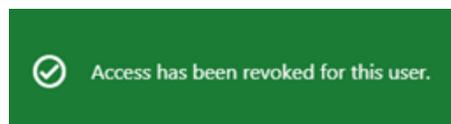

10. The user will be asked for a **Confirmation Code**. The member granting access will need to supply this code, located in the Shared Access tab.

DELETING SHARED ACCESS FOR A USER

1. Hover over **Tools**

2. Click **Settings**

3. Click the **Shared Access** tab

4. Select the **drop-down arrow** beside the user to be deleted
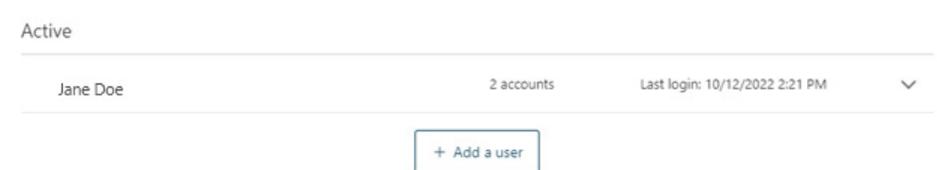
5. Click **Delete User**

6. Confirm the deletion by selecting **Yes, delete**

7. Confirmation of the deletion will display at the top of the window