

WECU SYSTEM UPGRADE: How To...

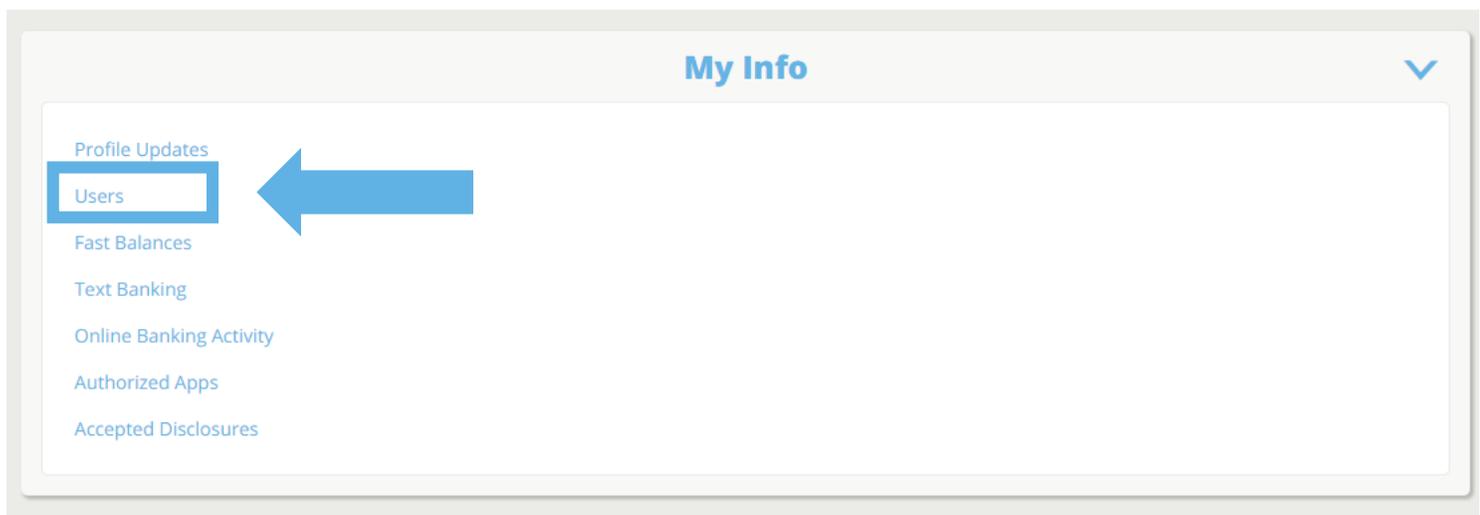
Add and Manage Secondary Users

How to Add a Secondary User

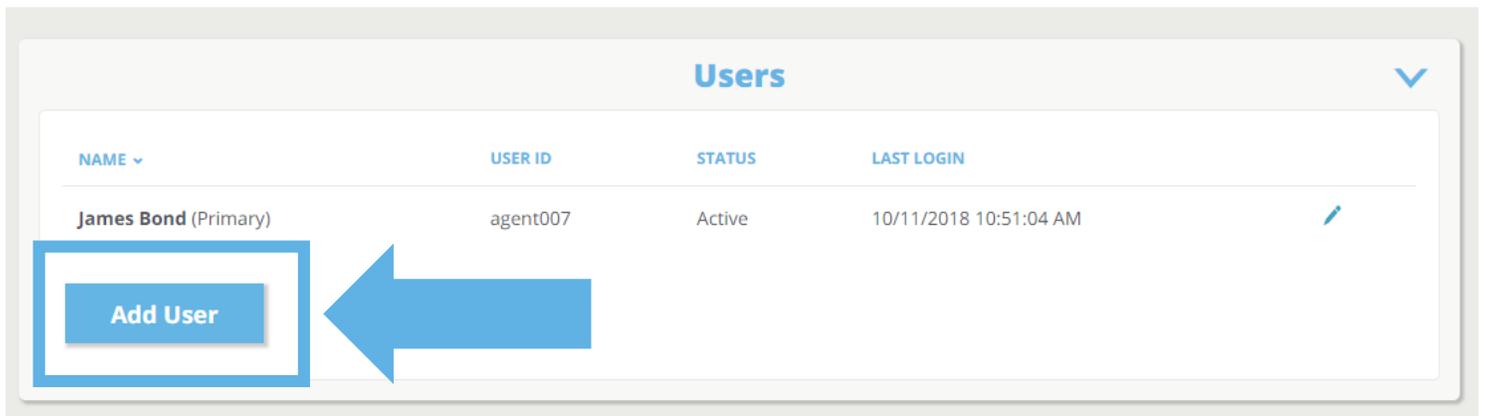
1. Once you're signed into Online Banking click on the icon or name text at the top of your screen.



2. From the My Info page select Users.



3. Select the information you would like to update (e.g. contact info, password).



For more information visit wecu.com/SystemUpgrade or call us at 800-525-8703.
WECU is insured by NCUA.

WECU SYSTEM UPGRADE: How To...Add and Manage Secondary Users

4. Fill out the user details for the Secondary User and click “Save” at the end.

User Details

* USER ID

* TEMPORARY PASSWORD

* CONFIRM PASSWORD

STATUS
 Active Disabled Locked

Personal Information

* FIRST NAME

* LAST NAME

BIRTH DATE
 

SOCIAL SECURITY NUMBER

Contact Information

* EMAIL ADDRESS

PHONE
() -

STATE

ZIP CODE

For more information visit wecu.com/SystemUpgrade or call us at 800-525-8703.
WECU is insured by NCUA.

WECU SYSTEM UPGRADE: How To...Add and Manage Secondary Users

5. You will now select the account Entitlements (permissions).

When you select an Entitlement checkbox (e.g. Accounts) a dropdown section will appear offering more options for that Entitlement.

 The user "Eve Money penny" has been added. On this screen, please set the entitlements for the user.

Entitlements for Eve Money penny

Entitlement	Limit	
Accounts		<input checked="" type="checkbox"/>
Stop Payments »		<input type="checkbox"/>
Bill Pay »		<input type="checkbox"/>
Transfers »		<input type="checkbox"/>

Accounts	All Entitlements	Stop Payments	View	Transfer From	Transfer To
XXXXXXXX800 - Main Checking - 00700758	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
XXXXXXXX100 - Regular Savings - 00700751	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
XXXXXXXX100 - Minor (By) Savings - 00800851	<input type="checkbox"/>		<input type="checkbox"/>		
XXXXXXXX100 - Minor (By) Savings - 00900951	<input type="checkbox"/>		<input type="checkbox"/>		

6. Click "Save" to confirm Entitlements for the Secondary User.

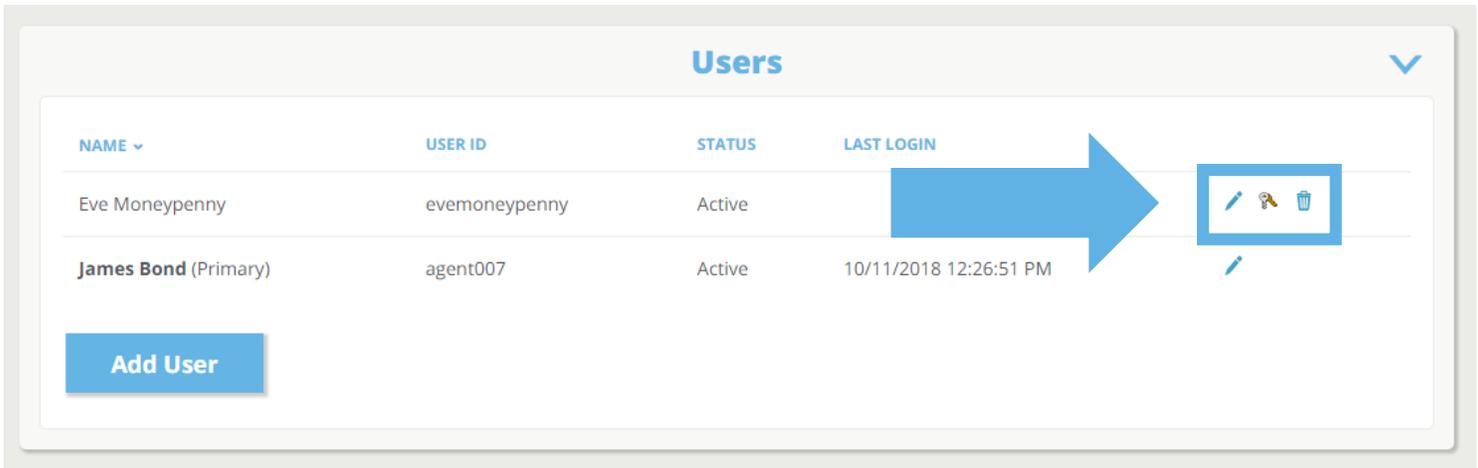
James Bond 

IMPORTANT NOTE: Please see last page for note on Identity Verification.

For more information visit wecu.com/SystemUpgrade or call us at 800-525-8703.
WECU is insured by NCUA.

How to Manage Secondary Users

1. Go to the Users page via previous instructions to add a user.
 - **Overview/Home Page > Profile > Users**
 - To edit the User Details click the pencil icon. 
 - To edit the Entitlements click the keys icon. 
 - Click "Save" when complete with edits.

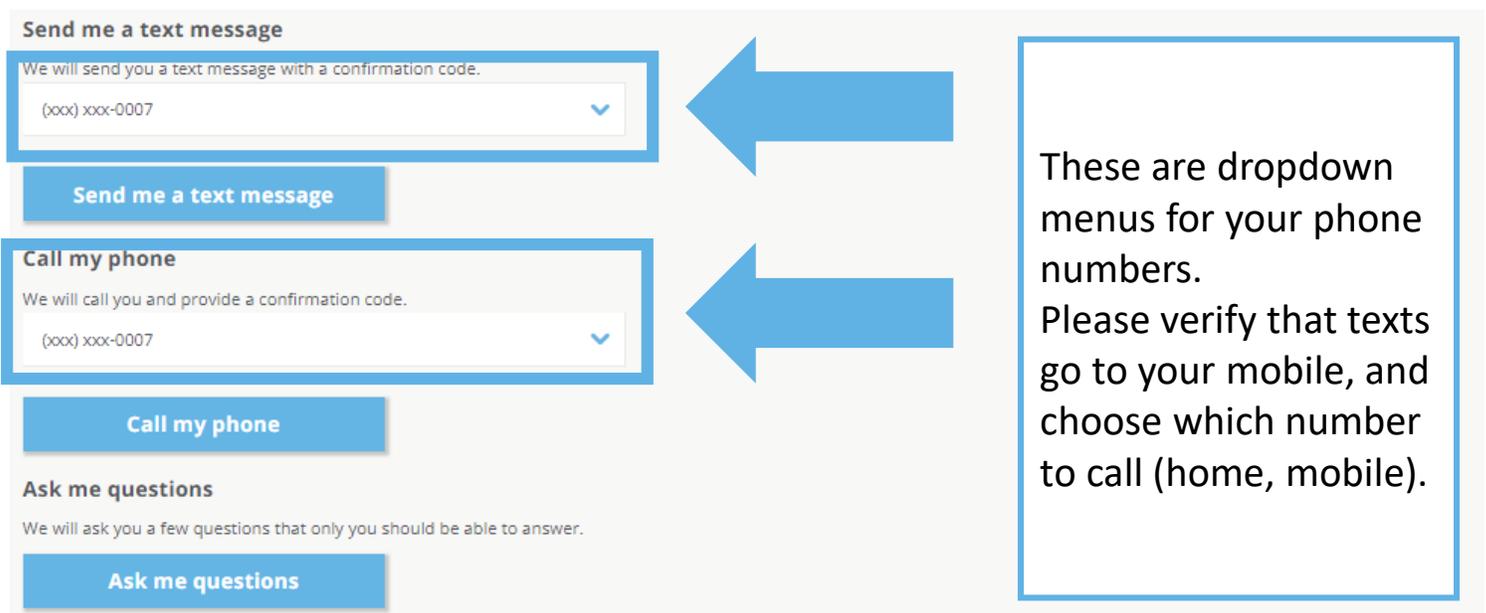


NAME	USER ID	STATUS	LAST LOGIN	
Eve Moneypenny	evemoneypenny	Active		  
James Bond (Primary)	agent007	Active	10/11/2018 12:26:51 PM	

[Add User](#)

Important Note: Identity Verification

Any changes to personal info or users will prompt an identity verification.



Send me a text message
We will send you a text message with a confirmation code.
(xxx) xxx-0007

Send me a text message

Call my phone
We will call you and provide a confirmation code.
(xxx) xxx-0007

Call my phone

Ask me questions
We will ask you a few questions that only you should be able to answer.

Ask me questions

These are dropdown menus for your phone numbers. Please verify that texts go to your mobile, and choose which number to call (home, mobile).