

Disabling & Deleting a Sub User in OLB

Disabling a Sub-User

Sub-User Administrators can disable another sub-user when access is no longer required due to job moves, leave of absence, promotion and so forth. Once a sub-user is disabled, he or she can no longer access or use the Focus Customer's account. Administrators can easily re-enable a sub-user at any time. Please follow the institution's policy on disabling sub-users.

To disable a sub-user, do the following.

1. On the Cash Management Drop-down Menu or Cash Management Page, click the **Administration** link.
2. On the Sub-User Administration page, click **Modify Sub-User Information** in the sub-user's **I want to** menu. The Modify Sub-User - User Information page appears.

The screenshot shows the 'Sub-Users Administration' page. At the top, there is a 'Cash Management' header and a notification 'Sub-User Changes Pending Approval (1)'. Below this is a table with columns 'Access ID', 'Name', and 'Actions'. A single row is visible with '54467' as the Access ID and 'test123' as the Name. The 'Actions' column for this row has a dropdown menu open, showing options: 'Modify Sub-User Information', 'Modify Access To Accounts', 'Modify ACH Credit Origination', 'Modify ACH Debit Origination', and 'Modify Other Commercial Services'. The 'I want to' dropdown is also visible in the top right corner of the table area.

Access ID	Name	Actions
54467	test123	<div>I want to ▾ Actions Modify Sub-User Information Modify Access To Accounts Modify ACH Credit Origination Modify ACH Debit Origination Modify Other Commercial Services</div>

3. On the Modify Sub-User - User Information page, click **Disable**.

Modify Sub-User - User Information

I want to ▾

* Prior Login: Never Logged In

* At least one phone number must be entered

* Access ID: 54467

* Name: test123

Mobile Phone: 201-952-3045

* SSN: 009876543

* Email: suvanjana.ghosh@apiture.

Alternate Phone #:

Sub-User Administrator:

☐ Allows the user to administer the accounts and privileges of other sub-users.

Security

Temporary Passcode:

Confirm Temporary Passcode:

Clear Security Q&A:

☐ Clear the security question and answer of the sub-user

Access Configuration

(View details of last 10 logins)

IP Address:

Sub-User Admin-Focus IP Address:

Mobile Application Access: ☒ Allowed ☐ Not Allowed

Submit

Cancel

Disable

Delete

4. The View Sub-User Information page appears, indicating that the sub-user has been disabled.

Cash Management

View Sub-User Information

I want to ▾

Access ID: 54467

Name: test123

Mobile Phone 201-952-3045

SSN: *6543

Email: suvanjana.ghosh@apiture.com

Alternate Phone #

Sub-User Administrator Setting: No

Enabled or Disabled? Disabled

Access Configuration

(View details of last 10 logins)

IP Address:

Focus Customer IP Address:

Mobile Application Access: Allowed

Limits

	ACH Credit (e.g. Consumer/Payments, NACHA Import, Commercial)	ACH Debit (e.g. Consumer/Payments, NACHA Import, Commercial)	EFTPS	Wires
Limit Amount \$	None	None	None	None

5. The Sub-Users Administration page displays a Disabled icon next to the user.

Overview Accounts ▾ Bills & Payments Move Money ▾ **Cash Management ▾** ?

Cash Management

Sub-User Changes Pending Approval (1)

Sub-Users Administration

I want to ▾

Access ID	Name	Actions
54467 Disabled	test123	I want to ▾

6. If you want to re-enable the user, click **Modify Sub-User Information** in the sub-user's **I want to** menu.

The Modify Sub-User - User Information page appears.

7. Click **Enable**.

* Prior Login: Never Logged In

* At least one phone number must be entered

* Access ID: 54467

* Name: test123

Mobile Phone: 201-952-3045

* SSN: 009876543

* Email: suvanjana.ghosh@apiture.

Alternate Phone #:

Sub-User Administrator: ☐ Allows the user to administer the accounts and privileges of other sub-users.

Security

Temporary Passcode:

Confirm Temporary Passcode:

Clear Security Q&A: ☐ Clear the security question and answer of the sub-user

Access Configuration

(View details of last 10 logins)

IP Address:

Sub-User Admin-Focus IP Address:

Mobile Application Access: ☒ Allowed ☐ Not Allowed

Submit

Cancel

Enable

Delete

The View Sub-User Information page appears, indicating that the sub-user has been re-enabled.

View Sub-User Information

I want to ▾

Access ID: 54467

Name: test123

Mobile Phone 201-952-3045

SSN: *6543

Email: suvanjana.ghosh@apiture.com

Alternate Phone #

Sub-User Administrator Setting: No

Enabled or Disabled? **Enabled**

Access Configuration

(View details of last 10 logins)

IP Address:

Focus Customer IP Address:

Mobile Application Access: Allowed

Deleting a Sub-User

Sub-User Administrators can delete other sub-users. Because deleting a sub-user can affect pending commercial transactions, do not delete an access ID if only the sub-user information is changed (for example, if you have a new employee).

Simply modify the sub-user name, social security number, and email address, and set a temporary passcode with the new employee information.

NOTE: A sub-user's access ID cannot be reassigned once it has been deleted.

To delete a sub-user's information, do the following.

1. On the Cash Management menu page, click the **Sub-User Administration** link.
2. On the Sub-Users Administration page, click **Modify Sub-User Information** in the sub-user's **I want to** menu. The Modify Sub-User - User Information page appears.
3. On the Modify Sub-User - User Information page, click **Delete**.

Modify Sub-User - User Information

I want to ▾

* Prior Login: Never Logged In

* At least one phone number must be entered

* Access ID: 54467

* Name: test123

Mobile Phone: 201-952-3045

* SSN: 009876543

* Email: suvanjana.ghosh@apiture.

Alternate Phone #:

Sub-User Administrator: ☐

Allows the user to administer the accounts and privileges of other sub-users.

Security

Temporary Passcode:

Confirm Temporary Passcode:

Clear Security Q&A: ☐ Clear the security question and answer of the sub-user

Access Configuration

(View details of last 10 logins)

IP Address:

Sub-User Admin-Focus IP Address:

Mobile Application Access: ☒ Allowed ☐ Not Allowed

Submit

Cancel

Enable

Delete

A confirmation page with a list of dependent scheduled transactions appears.

- On the Confirmation page, if the sub-user has any scheduled transactions, they will appear on the page. When the Sub-user Administrator clicks the **Submit** button, the sub-user will be marked as deleted and all transactions involving the sub-user will be unscheduled. An in-session notification will be sent to the Focus Customer and the sub-user of the unscheduled transactions.

Overview

Accounts ▾

Bills & Payments

Move Money ▾

Cash Management ▾

?

Cash Management

Delete Sub-User

Access ID: 54467 Name: test123

Are you sure you want to delete this sub-user Access ID?

Once an Access ID is deleted, it cannot be reused. Instead of deleting it, you can re-use this Access ID by modifying the sub-user profile.

Click the "Cancel" button below if you wish to cancel this request.

Submit

Cancel

Dependent Transactions

There are no affected dependent transactions.

You have successfully deleted a Sub-User.