YNCU

Business Digital Banking

Delegate setup guide

A quick guide for business members to set up delegates and help them sign in for the first time.

Step 1 Once you're signed in to your new YNCU online banking, select Services from the left menu, then choose Manage Delegates.

Step 2 Click Add New Delegate.

Step 3 Enter First Name, Last Name, Role (Delegate - Initiator or Delegate - Read Only), Email, and your Mobile Phone Number. **The phone number is used to send you a one-time security code.**

Step 4 Click the checkbox to confirm and then select Continue.

Step 5 A confirmation page will populate. Select Confirm after reviewing delegate information.

Step 6 A 6-digit security code will then be sent to your email or mobile phone number to confirm the addition of the delegate.

Step 7 When the delegate is successfully created, the confirmation page will provide you with their username.

Step 8 An email or text message will be sent to the delegate with their new case-sensitive username.

Step 9 Within 15 minutes, an email or text message will be sent to the delegate with their temporary password. The temporary password remains active for **24 hours**.

Step 10 The delegate can now sign in and will be prompted to create their own password.

Important notes

- Use the delegate's email or mobile number for username and one-time password delivery.
- Usernames are case-sensitive.
- Temporary passwords expire after 24 hours.