

INSTRUCTIONS

How to issue permissions for a user type Corporate Entry User - Performer (multi-level control)

Need to log in as the Administrator (**Approver**) user login.

Open page - **Settings >General management >Change user information**

Click on the User name (Entry user) in the “User ID” field.

Change user information

- Change information of registered company.
Transaction is disabled due to long-term unuse: If transaction is not activated for certain period, transaction is limited. Change user information to enable transaction.
- How to initialize wrong password error: If wrong password exceeds 5 times, register password again to initialize error.
If you select "Direct Input beneficiary account", please register beneficiary account in Menu "Register/Change Account". Password is not allowed to use five consecutive characters/numbers or more.
- In case of company with Audit setting, wait for approval after completing modification. Just confirm the status by Audit progress

User type	User ID	User Name	User Level
Corporate Entry User	User1	CUS_SUBNM1700614881	Entry
Corporate Confirm User	User2	CUS_SUBNM1700614881	Approve

Next, click "**Modify**" button.

Change user information

User type	Corporate Entry User	User Level	Entry
User Name	CUS_		
User ID	User1	E-Mail address	
Telephone No.	1700614881	Opened Date	21/06/2016
Number of Errors for User Password	0	Last Changed Date	04/08/2021
Restriction for Dormant Account	Transaction Enable	Last Trx. Date	08/09/2021

Detailed task

Transaction time limit

Public holiday transaction

Direct input beneficiary account

Viewing authority of all accounts

List

Modify

On page «Change user information»

1) Check in User Level field – “**Entry**”.

2) Mark in checkbox **Public holiday transaction, Direct input beneficiary account**.

3) Change password (if it needed).

Confirm data with OTP password from security device.

Change user information

Basic Information

User type	Corporate Entry User	User Level	Entry
User Name	CUS_SUBNM1700614881		
User ID	DAEWOO12	E-Mail address	1700614881@shinhan.com
Telephone No.	1700614881		

Detailed task

Transaction time limit

Public holiday transaction Direct input beneficiary account Viewing authority of all accounts

User password settings

New password: Use a combination of 8-12 English letters, numbers, and special characters. Case-sensitive

Verify new password: Re-enter new password

Release Accident

Release transaction restriction due to long-term un-use internet banking

OTP token password: Enter 6 characters

2) Open page - **Settings >General management >Change user authority**

Click on the User name (Entry user) in the “User ID” field.

Change user authority

- Change authority to use registered services menu
- In case of company with Audit setting, wait for approval after completing modification. Just confirm the status by Audit progress

Type	User ID	User Name	Authority	Task status(Hierarchical classification)
Corporate Entry...	User1	CUS_	Entry	Cash Management,Payment/Transfer ,Cards,Settings
Corporate Confir...	User2	CUS_	Approve	Cash Management,Payment/Transfer ,Cards,Settings

Press «**Modify**» button

Change user authority

- Change authority to use registered services menu
- In case of company with Audit setting, wait for approval after completing modification. Just confirm the status by Audit progress

User type	Corporate Entry User	User Level	Entry
User Name	CUS_SUBNM1700614881	User ID	DAEWOO12

Menu List

Top menu	Side menu
Cash Management	Deposit Accounts,Loan Accounts,Manage Transaction,Fee Transaction History
Payment/Transfer	Exchange Rate,Consolidate MT102 Payment,Domestic Transfer,Overseas Transfer,Transfer within Shinhan
Cards	Manage Virtual Business Card,Transaction History of Virtual Business Card,Member/Card Information,Transaction History,Report Card Lost,...
Settings	User management,Account management,Message Box ,Report Lost and Stolen

Select all items in menu and confirm the changes. Confirm data with OTP password from security device (If you need to close certain functions for Entry user, do not select this tab in menu)

Change user authority

- Change authority to use registered services menu
- In case of company with Audit setting, wait for approval after completing modification. Just confirm the status by Audit progress

Basic Information

User type	Corporate Entry User	User Level	Entry
User Name	CUS_SUBNM1700614881	User ID	DAEWOO12

Menu List

If you wish to designate a task, please select the relevant category.

Cash Management

- Deposit Accounts
- Account List
- Account Transaction Details
- Closed Account List
- E-Statement Inquiry
- E-Statement Inquiry(NEW)
- Loan Accounts
- Loan Information
- Loan Transaction Details
- Loan Repayment Schedule
- Loan Limit Inquiry
- Loan Interest Details
- Manage Transaction
- Transaction History Inquiry
- Approval progress status
- Fee Transaction History

3) Open page **Settings >General management >Register/change approval line**
Press «**Register**» button.

Register/change approval line

- Register or change approver.
- Up to 20 Approval lines can be registered.
Approval steps are composed of at most 9 steps, including at least one approval authority.
- In case of company with Audit setting, wait for approval after completing modification. Just confirm the status by Audit progress

Approval statement	Total approvers	Task status
User1	1	Transfer within Shinhan
User2	1	Transfer within Shinhan,Domestic Transfer Application,Bulk Transfer (Text file),Register Payment in RUB,Register...

Register

- 1) Fill ID of Approval user.
- 2) Select all operations that need to confirm by Approval or Admin users.
- 3) If Administrator want payments and transfers execute without approval of Approver User (directly to the bank system), it is necessary to select Transaction complete without approval (Arbitrary decision) “**Arbitrary Decision Status**”.

Register/change approval line

Approval statement **1**

Task status **2**

	Hierarchical classification	Middle classification
<input type="checkbox"/>	Payment/Transfer	Transfer within Shinhan
<input type="checkbox"/>	Payment/Transfer	Currency exchange
<input type="checkbox"/>	Payment/Transfer	Domestic Transfer Application
<input type="checkbox"/>	Payment/Transfer	Register domestic transfer (Text file)
<input type="checkbox"/>	Payment/Transfer	Bulk Transfer (Text file)
<input type="checkbox"/>	Payment/Transfer	Register Overseas Transfer
<input type="checkbox"/>	Payment/Transfer	Register Payment in RUB
<input type="checkbox"/>	Payment/Transfer	Apply Consolidate MT102 Transfer-File Upload(Text File)
<input type="checkbox"/>	Payment/Transfer	Bulk Transfer MT 102 (Text file)
<input type="checkbox"/>	Payment/Transfer	Register consolidate MT102 Transfer

Arbitrary decision status **3** Transaction completed without approval(Arbitrary decision)

To register Approval User - in “**Approval path status**” field need fill items as shown in picture. User’s name (User ID) is Approval User ID.
Confirm data with OTP token password from your security device.

Approval path status

Approval stage	User's name(User ID)	View details	Approval method
Select <input type="button" value="v"/>			
Select <input type="button" value="v"/>			

OTP token password

To change data on confirmation line (if there are already registered users to confirm payments), click on User name in the field “**Approval statement**”.

Register/change approval line

- Register or change approver.
- Up to 20 Approval lines can be registered.
Approval steps are composed of at most 9 steps, including at least one approval authority.
- In case of company with Audit setting, wait for approval after completing modification. Just confirm the status by Audit progress

Approval statement	Total approvers	Task status
	1	Transfer within Shinhan
	1	Transfer within Shinhan,Domestic Transfer Application,Bulk Transfer (Text file),Register Payment in RUB,Register...

Register

On **Register/change approval line page** with detailed information on Approver User, who confirms the operation, click "**Modify**".

Register/change approval line

Approval statement	User1	Date of final change	20/02/2020	
Task status				
Hierarchical classification	Middle classification			
Payment/Transfer	Transfer within Shinhan,Domestic Transfer Application,Bulk Transfer (Text file),Register Payment in RUB,Register consolidate MT102 Tran...			
Arbitrary decision status	<input checked="" type="checkbox"/> Transaction completed without approval(Arbitrary decision)			
Approval path status				
Approval stage	User ID	User's name	View details	Approval method
1	User1	CUS_	O	Serial

List Modify

For registration 2 or more Approval Users, in Approval path status, data of all Approval Users must be entered in order.

In this case, the Payment Order will be sent to the Bank only after confirmation of the payment by all Approval Users.

Approval path status				
Approval stage	User's name(User ID)	View details	Approval method	
1	CUS_	O	Serial	
Select	Select	Select	Select	Select
OTP token password	Enter 6 characters			
Cancel	Default Value	Confirm	Delete	

Account setup

1) Open page **Settings >Account management >Add/delete inquiry account**
Press on User ID name in «User ID» field.

Add/delete inquiry account

- Add or delete user's inquiry account
- It's only available to inquire the account which registered as inquiry account at branch.
- Select user ID and add/delete inquiry account.

User information

User ID	User Name	Number of Inquiry Account
User1	CUS_	9
User2	CUS_	9

Select accounts that will be available for work to Entry user.
Confirm data with OTP token password from your security device and press «**Save**».

Add/delete inquiry account

Basic Information

User ID	DAEW0012
User Name	CUS_SUBNM1700614881

Account Information

Specify account to be viewed	Inquiry Account	Nickname(product name)	Currency
<input checked="" type="checkbox"/>	KZ614350010001041606	Текущий счет	KZT
<input checked="" type="checkbox"/>	KZ204350017030012320	CUS-ALNM-NM1700614881	USD
<input checked="" type="checkbox"/>	KZ234350010000899312	DEP_AC_ALNM_NM1700614881	USD
<input checked="" type="checkbox"/>	KZ234350017000008420	CUS-ALNM-NM1700614881	KZT

OTP token password

Go Back

Save

2) Open page **Settings >Account management >Add/delete debit account**
Press on User ID name in «**User ID**» field.

Add/delete debit account

- Add or delete user's debit account.
- It's only available to inquire account which is registered as debit account at branch. Select user ID and add/delete debit account.
- In case of company with Audit setting, wait for approval after completing modification. Just confirm the status by Audit progress

User information

User ID	User Name	Number of account to withdraw
User1	CUS_	2
User2	CUS_	2

Select accounts that will be available for work to Entry user.
Confirm data with OTP token password from your security device and press «**Save**».

Add/delete debit account

Basic Information

User ID	User1
User Name	CUS_

Account Information

Select all

Designate debit account	Debit account number	Nickname(product name)	Currency
<input type="checkbox"/>	KZ204350017030012320	CUS-ALNM-NM1700614881	USD
<input checked="" type="checkbox"/>	KZ234350010000899312	DEP_AC_ALNM_NM1700614881	USD
<input checked="" type="checkbox"/>	KZ614350010001041606	Текущий счет	KZT
<input type="checkbox"/>	KZ754350017010056587	DEP_AC_ALNM_NM2020020081	KZT
<input type="checkbox"/>	KZ844350017010102209	CUS-ALNM-NM1700614881	RUB

OTP token password	<input type="text" value="Enter 6 characters"/>	
--------------------	---	--

Go Back

Save