There are two types of "CBS Online" users: Primary User (PU) and Delegated User (DU).

Primary User (PU)

Primary User is responsible for system management, including creating, deleting, amending, holding and restoring Delegated Users, setting limit of rights for accounts and users, and resetting passwords of Delegated Users, etc. Primary User also has the right to choose authorisation modes.

When opening "CBS Online" account at branch, customer should assign Primary User(s) and determine the functions which are available for Primary User(s) to access:

- 1. "All Primary Users can perform system management, monetary transactions and enquiry functions." or
- "All Primary Users can only perform system management and enquiry functions, but are not allowed to execute monetary transactions." or
- 3. "All Primary Users can perform system management functions, but are not allowed to execute monetary transactions and conduct enquiries."

At the time of account opening, customer can also determine whether "the authorisation of ANY ONE of the Primary Users" or "the JOINT authorisation of TWO Primary Users" is required to add, change or delete Delegated Users, set limit of rights for each user and account, change transaction limits and assign using of other functions at "CBS Online".

If customer needs to change Primary User, the authorised signatory of "CBS Online" should visit the designated branch in person.

Delegated User (DU)

Delegated User is a general user of "CBS Online" other than Primary User. Once a Primary User has created a Delegated User, that Delegated User can access all functions and rights assigned to them at "CBS Online".

If a Delegated User is authorised to access "Internal Control Available" function, that Delegated User will be able to perform system management functions including creating, deleting, amending, holding and restoring other Delegated Users, setting limit of rights for accounts and users and resetting passwords of other Delegated Users. All these actions will only be executed after the Primary User has granted the authorisation.

6.1 Create Delegated User

Step 1:

Under the "User Settings" page of the "Management" section, Primary User can press

+ Create User

My Shortcut *	Cash Manag Activity	Authorisation Mode	Credit Card User	Authorisation	and the second second		Authorisation Centre ficiary Account List	Download Centre List of Holder's	Management	Tools C
	Record	Settings	Settings	Settings			orisation Settings	Accounts	Password	Settings
1997) - 1977) - 1977)	ement > User	Settings > User List					🖨 Etint 🕐	Help 🚳 User	Guide 🛞 Ada	d to My Short
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+ Create User	ד ע			_						
User ID 🕴		User Name	Status	Oro	up			Action		
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AUTH2		AUTH2	Active	A						
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"User Information" input page (page one) under "Standard Authorisation Mode":

User Information			
User Name			
UserID			
Password #		(0-12 digits)	
Please re-enteryour password			
Nobile Phone Number	Country and Area Code - Phone	Number	
Email Address			
Designated Transaction Notification	Means of Notification SMS Email Language Selection Traditional Chinese Simplified Chinese English		
Authorisation Group	Please Select 📽		
Apply for Security Device	Г		

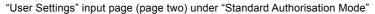
The "Authorisation Group" showed in this page represents the authorisation group of all transactions for this user.

ser Informati	on	(*)
User Name		
User ID		
Password #	(6-12 digits)	
Please re-enter your password		
Mobile Phone Number	Country and Area - Phone Number	
	Code Priorie Number	
Email Address		
Designated Transaction Notification	Means of Notification SMS © Email	
	Language Selection	6.51
	O Simplified Chinese	
	O English	
Authorisation Group	Please Select 💌 (Applicable to control over list of beneficiary accounts only)	
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"User Information" input page (page one) under "Advanced Authorisation Mode":

The "Authorisation Group" showed in this page represents the authorisation group of this user who controls the list of beneficiary accounts. It does not represent the other authorisation group of transactions conducted by this user.

only)



You are here: Management > User Settings > User List Steps 1 2 3 4 🖑 Print 🕐 Help 🕄 Service Directory Refer to User Settings Select User # Please Select 🛩 Customer can warks # The respective access rights will be specified under "Refer to User Settings" according to selected users. The M refer to the existing "User Functional Rights Settings Cash Management . Settings" Payments and make Transfer Express Transfer Electronic Transfer (Express Processing) Electronic Transfe amendment F BOC Remittance Plus Telegraphic Transfer C Demand Draft E Stop Chequ F Bill Payment T Autopay-Out F Payroll F Request Cheque Book Receivables Time Deposit Set Up Time Deposit Close Time Deposit T Maturity Date Amendment Select Account Instruction Maintenance functions F Beneficiary List available for Credit Card . that user to Account Overslew, Transaction History E Payment Credit Adjustment, Commercial Card Application, Comm Card Promotions access E Insurance China Express" Accidental Confer Insurance Emergency Medical Plan C Universal Travel Insurance C Employees' Compensation Building Management
 Comprehensive Insurance Public Liability Insurance
 Fire Insurance Motor Vehicle Insurance E Burglary Insurance rensport insurance F Money Insurance C Oroup Life Protection Plan (Marine Insurance) Hull Insurance / Protection **BOC Business** and Indemnity Cover for Local Craft Insurance Comprehensive Insurance Plan Trade Services . □ Import Export Export E Letter of Guarantee Credit Limit C Other Services Message F Gend Message Other Settings Enquire Activity of Other Users (not a Account Rights Settings Daily Debit Limit of Holder's Account (HKD equivalent) C Download Documents (All transactions under the following accounts will be conducted according to the authorisation settings given under the "User Information".) Monthly Statement Authoristation Daily Debit Limit of Holder's Account Enter Account Number Account Name Enquiry Consolidated Statement Consi Stater Transaction (HKD equivalent) Apply settings to all accounts F Autopay-Out File F Parro HKD Savings Account -Receivables 039-730-1-010329-0 ACCOUNT 1 Autopay-In File HKD Current Account . Upload File 039-730-0-045933-2 -Г Г ACCOUNT 1 Time Deposit Account T Autopay-Out . 039-8769453-0 ACCOUNT 1 Bills Account C Autopavin . 039-730-61-00493-9 ACCOUNT1 F F MPF Contributions File Back Submit Cloar Assign rights and daily transaction limits for different types of account for that user

"User Settings" input page (page two) under "Advanced Authorisation Mode"

efer to User Settings									
Select User# Please Sele									
Remarks : # The respective access ri	phts will be a	pecified under "Refer to User !	Settings" according to selec	cted users. The	Menu will display the	e users' rights	automatically.		
unctional Rights Settings									
Cash Management									
Payments									
Transfer	T Expre		lectronic Transfer Depress Processing)	Electronic	Transfer				Select
Telegraphic Transfer	□ Demi	and Draft 🔽 🕅 Br	OC Remittance Plus	F Stop Cher	que			1	functions
F Request Cheque Book	IT Payro	е Гв	ill Payment	T Autopay-0	ut				available fo
Receivables									that user to
Time Deposit									access
F Set Up Time Deposit			aturity Date Amendment	F interest R	ale Enquiry				400000
Maintenance	Accou	int in	istruction						
F Eeneticiary List									
Credit Card							*		
F Account Overview,	F Paym		redit Adjustment,						
Transaction History		As	ommercial Card pplication, Commercial						
Provincial		ci	ard Promotions						
Insurance China Express* Accidental									
Emergency Medical Plan			niversal Travel Insurance	Insurance	2				
Motor Vehicle Insurance	F Build	ing Management	ublic Liability insurance	Fire Insur	ance				
Transport Insurance			urglary insurance	□ Group Life	Protection Plan				
(Marine Insurance)	F	nsurance / Protection							
Comprehensive Insurance	and in	ndemnity Caver for							
Trade Services	Local	CraftInsurance							
	-	Account Rights S	Settings						
Credit Limit	Г Ефо		Ider's Account (HKD ex	quivalent)					
Other Services	_	(All transactions under	r the following account	s will be con	ducted according	to the author	risation setting	s given unde	er the "User Information".)
Message				-72 54444	Enter			Auth	Daily Debit Limit of Holder's
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Other Settings		-							(HKD edownent)
Enquire Activity of Other Users	intern Inct a		s to all accounts ayment/Auto-pay	,	-				
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Download Documents		039-730-1-010329-0	ACCOUNT 1	Г	Γ.	Γ.	F		
Monthly Statement									
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Consosidated Statement	Fr cons State			F	Г	F	F		
	State	039-730-0-046933-2		F	٣	г	٣		
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Consoleased talement Payments C Adcoay-Out File Receivedes C Adcoay-bit File Upload File Payments	State	039-730-0-05823-2 Payroll HRD Strings Act 039-730-1-01029-0 HRD Current Act 039-730-0-045933-2 Time Deposit Act	ACCOUNT 1 COUNT ACCOUNT 1 ACCOUNT 1	F	r r	r r	r r		· ·
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Step 2:

(1) Require authorisation from one Primary User

After entering the information and pressing **Submit**, Primary User will see the following verification section at the bottom of the confirmation page.

Confirmed by USR98	Please press 🧟 to generate a 6-digit security code on The screen. Please enter your 6-digit Security Code	Security Code () & () () & () &
		Back Confirm

Enter the Security Code and then press Confirm to go to the result page. The Delegated User creation process will then be completed.

(2) Require authorisations from two Primary Users

After entering the information and pressing **Submit**, Primary User will see the verification section at the bottom of the confirmation page. Enter the Security Code and then press **Confirm** to go to the result page. After the authorisation is confirmed by another Primary User, the Delegated User creation process will be completed.

6.2 Amend User Settings

Customer can access the "User Settings" page under the "Management" section to amend the settings of existing users.

My Shortcut 🔻 📗	Cash Management Trade Services Activity Authorisation Mode Record Settings	Contraction of the local division of the loc	surance Invest thorisation Matrix Settings		Other Settings
You are here: Manage	ment > User Settings > User List			Apart from amending "User	Short
(* Optional input)				Settings", customer can also	
User Search	C			select other actions such as	<u> </u>
User Name *				"Hold", "Restore", "Delete",	
User ID *					
Status	All			itteett i deenterd and	
Group	All 🐱			"Security Device Setting".	
1	Search Clean				
+ Create User				+	
User ID	User Name 🕴	Status	Group	Action	
AUTH1	AUTH1	Active	A	Ecounty Device B	(initial)
AUTH2	AUTH2	Active	A		
AUTH3	AUTH3	Active	8	Hold Delete Reset Password Security Device S	danig
AUTH4	AUTH4	Active		Hold Delete Reset Password Security Device S	eang.
AUTHS	AUTH5	Active		Hold Delete Reset Password Security Device S	cionis)
USER1	USER1	Active		Hold Deleter Reset Password Second Device o	GRIEG
USER2	USER2	Active		Hold Collete Rosel Password Security Devices	COMP
USER3	USER3	Active		Hold Reset Passward Social Device S	dining.
USER4	USER4	Active		Hold Delete Reset Password Security Device S	SON O
USER5	USER5	Active		Hold Delste Reset Password Security Device S	Santa
				Authorisation Matrix Se	ttings
stomer car	select a specific			▲	
	enter the "User		Afte	er finishing user settings, cus	tom
	amendment.			press Authorisation Matrix Settings	-
				ceed to authorisation matrix settir	