Santander® Link User Guide

Version 2.4
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If you have questions, contact Transaction Banking Client Services at 1-844-726-0095 or email clientservice@santander.us

Santander

Welcome to Santander Link

Santander Link is a secure Web portal providing access to Santander Treasury Link and other online banking and information services.

Access to all online services provided by Santander is provided through this single portal.

For administrators, client administration for Santander online products is handled directly in Santander Link.

At Santander Bank, we're working hard to give you the best possible banking experience. We hope you enjoy using Santander Link as your online banking resource.

Contents

Single Sign-On (SSO) Portal Access

A single universal login screen provides access to the entire Santander Link portal. Log in by entering your company ID, User ID, and Password. If you wish to have the computer or device remember your company ID and User ID, check the box next to "Remember my login credentials". Finally, click Sign in.
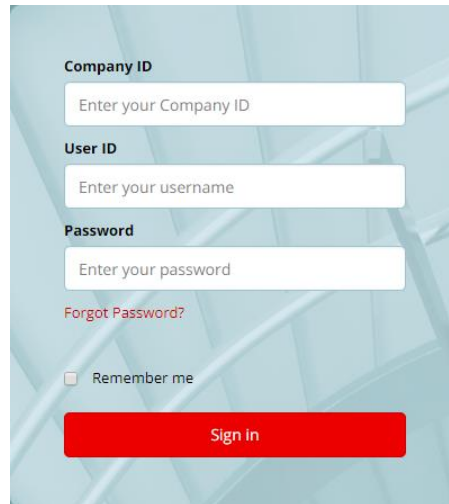
Note: All fields are case sensitive.

Figure 1: Santander Link login screen

In case you are logging in for the first time, you will be asked to select the three security questions from the dropdowns and their subsequent answers. If you are signing in on your computer, check the box next to "This is a personal computer. Remember this device." Click Set Answers.
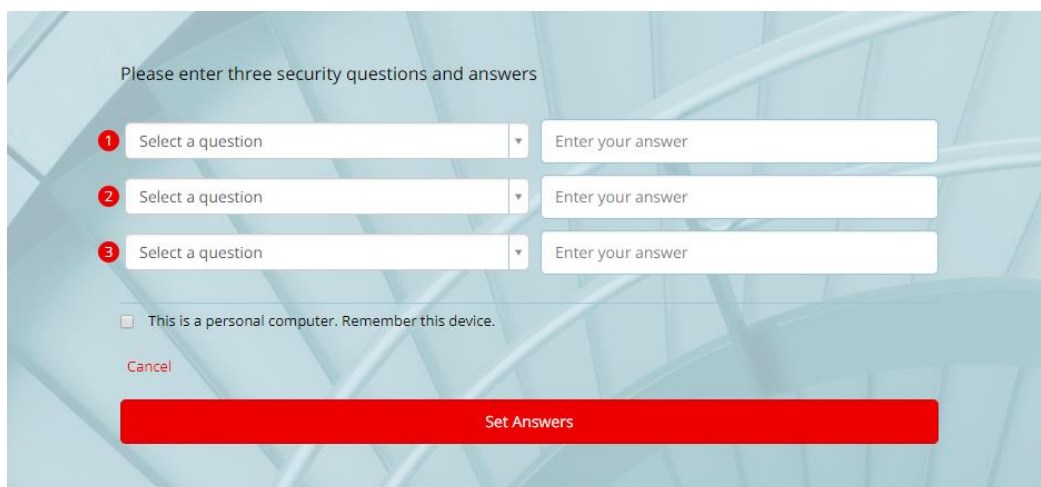

Figure 2: Security questions

Santander Link Landing Page

The Santander Link landing page provides direct access to online banking services you are entitled to, as well as various informational features.
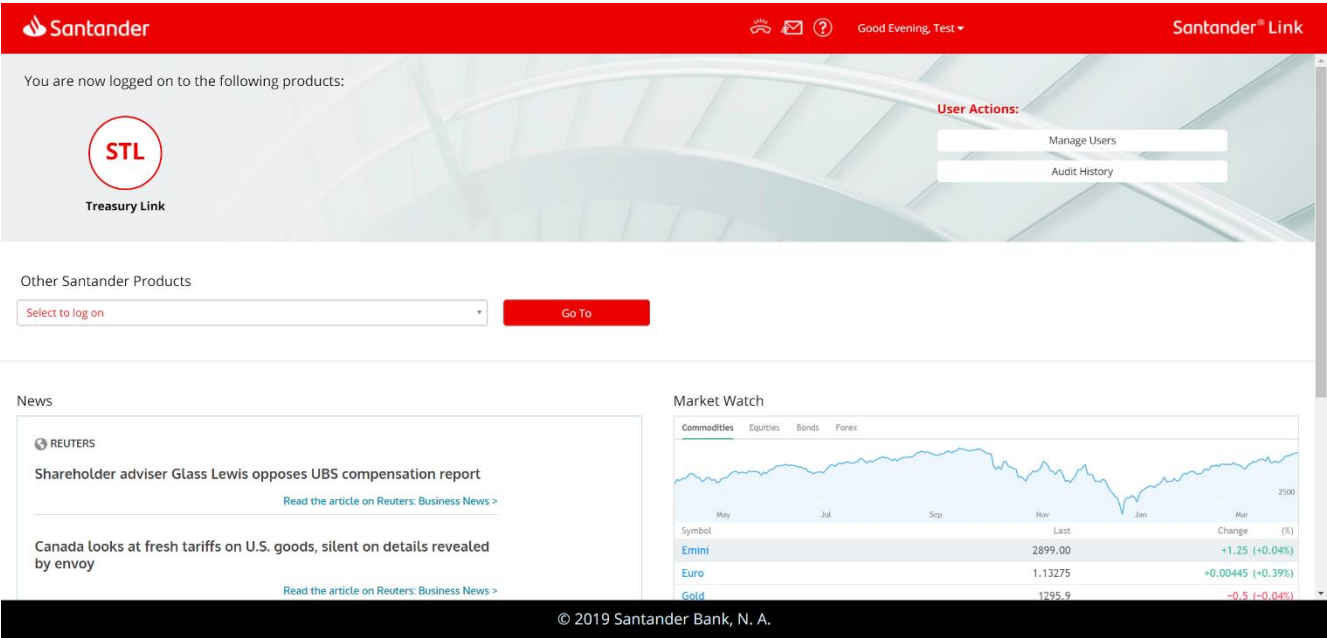

Figure 3: Santander Link landing page

User menu

The dropdown at the top next to your name provides the user menu options to help you Manage Company Profile, Manage your Profile, Reset Password and Reset Security Questions, and Log out of Santander Link.
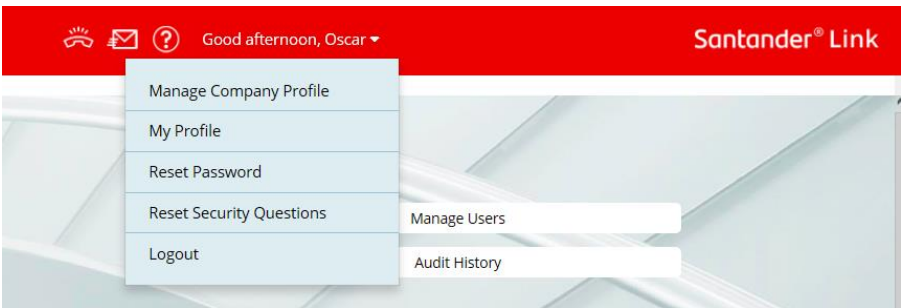

Figure 4: User menu

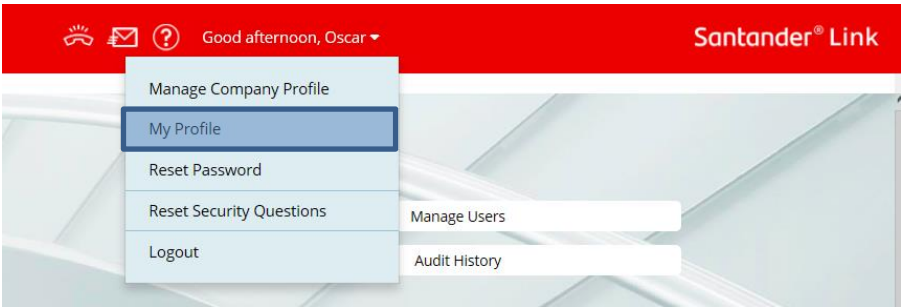To view and manage your profile, select My Profile from the menu dropdown.

Figure 5: Opening My Profile

Once selected, My Profile dialogue box will open, showing your Company ID, personal information, and Enable Date. You may use this form to update your email address and phone number. Click the Save User when you are done editing or click the ✕ on the top right to close the dialogue box.

Figure 6: Editing and saving profile information

Resetting your password

To reset your password, select the Reset Password from the user menu dropdown.
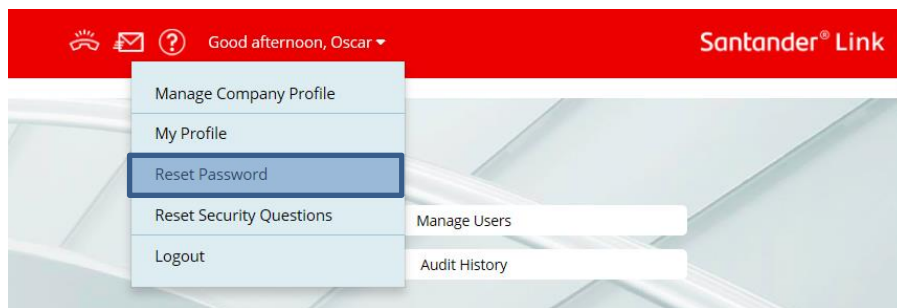

Figure 7: Opening Reset Password

In the Reset Password dialogue box, enter your current password in the first field. Enter your new password in the second and third fields. Follow the instructions in bullet points to the right to create your new password. Select the Reset button on the bottom right to finish resetting your password.

Figure 8: Resetting your password

You will see a message at the top of the landing page that will confirm that your password has been successfully changed.
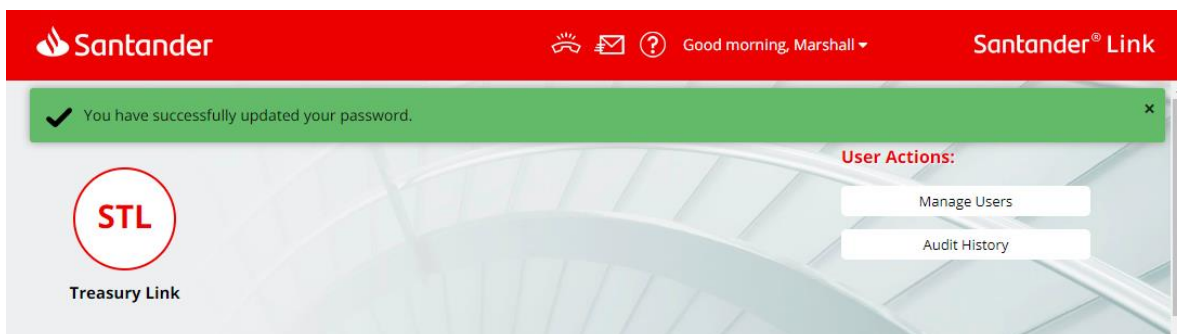

Figure 9: Password successfully changed

Resetting your security questions

To reset your security questions, select Reset Security Questions from the user menu.
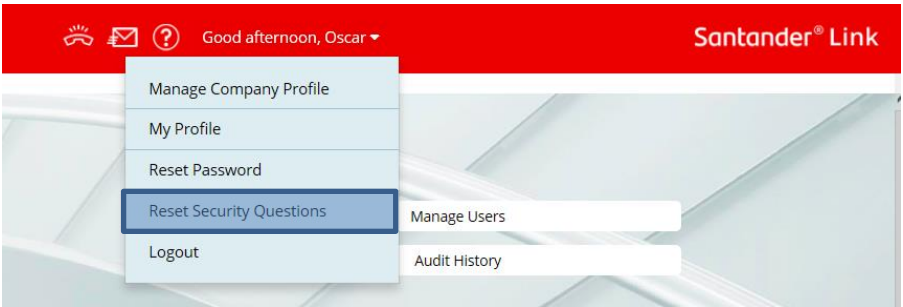
Figure 10: Opening Reset Security Questions

Before you can reset your security questions, Santander Link will ask you for the answer to one of your current security questions. Enter the answer to the security question asked and click the Submit button.

Figure 11: Answering your security question

Select your new security questions from the dropdown menu and enter your answers, then click the Submit.

Figure 12: Entering new security questions

You will see a message at the top of the landing page that will confirm that your security questions were successfully reset.
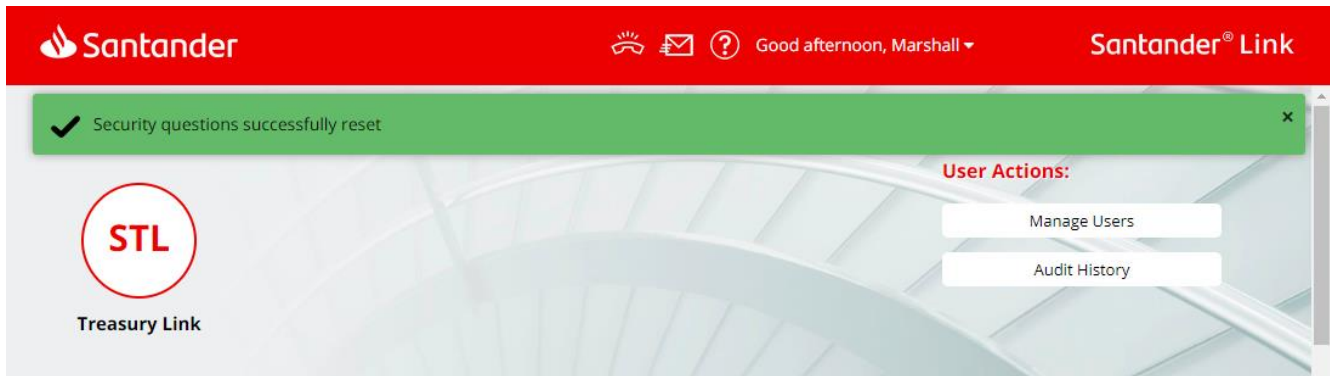

Figure 13: Security questions successfully reset

Replacing forgotten password

If you can't remember your password, click on the red "Forgot Password?" link below the password field, on the login screen.

Figure 14: Clicking Forgot Password?

Santander Link will ask you for the answer to one of your current security questions, this is to verify your identity. Enter the answer to the security question asked and click the Submit button.
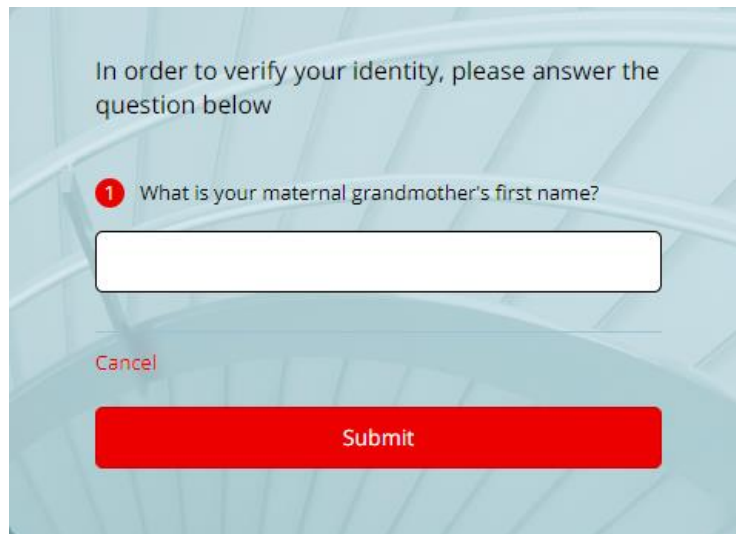
Figure 15: Answering your security question

You will see a message on the top of the page that will inform you that a temporary password has been sent to you via email. Check the email inbox that you had provided the bank to in order to find the temporary password.
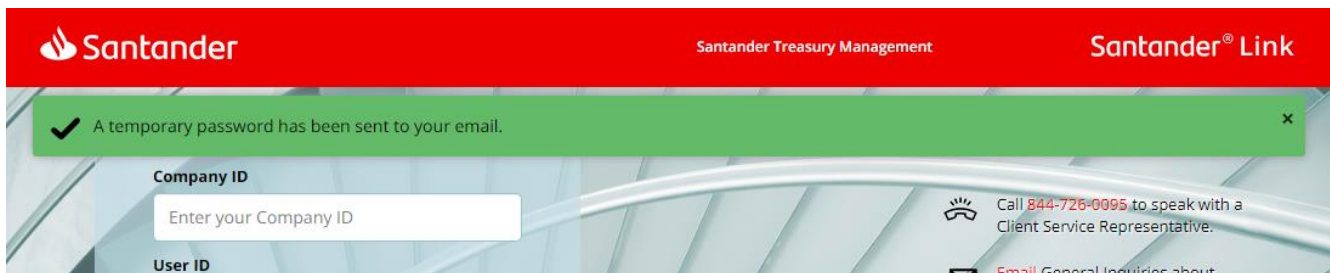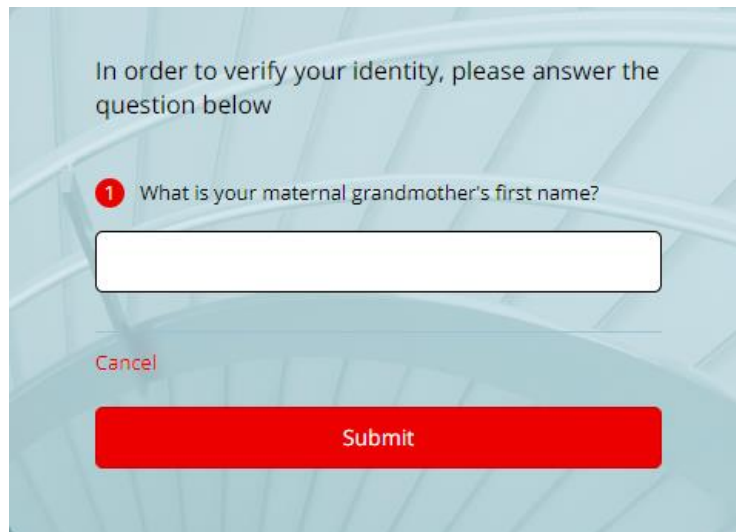

Figure 16: Temporary password sent

Log in using the temporary password. You will be prompted to change the temporary password. The system will present another one of your security questions to verify your identity. Answer the question and select the Submit and Sign in.
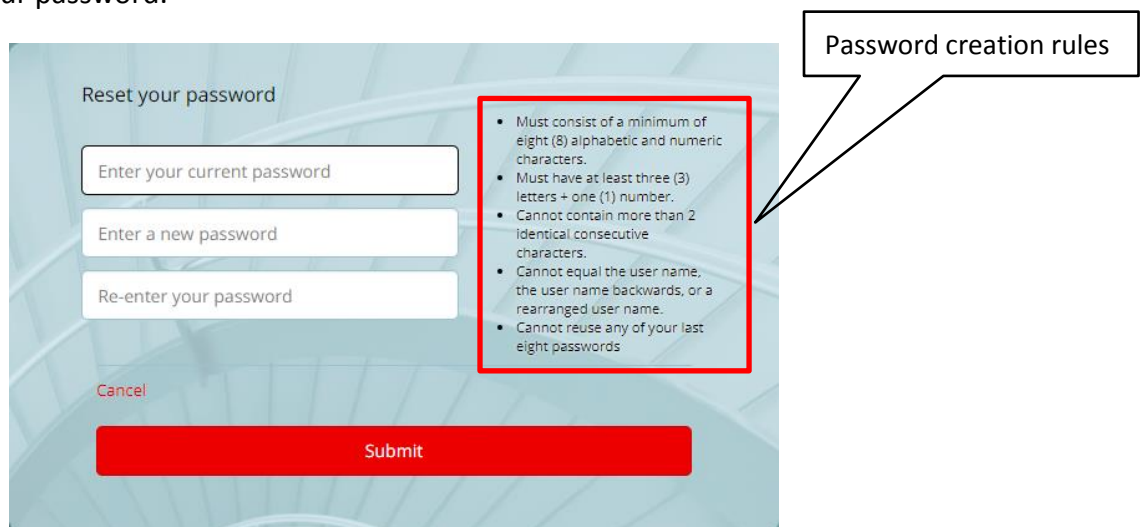
Figure 17: Answering your security question

The system will then ask you to reset your password, in the Reset Password dialog box, enter the temporary password in the first field. Enter your new password in the second and third fields. Follow the instructions in bullet points to the right to create your new password. Select the Reset button on to finish changing your password.
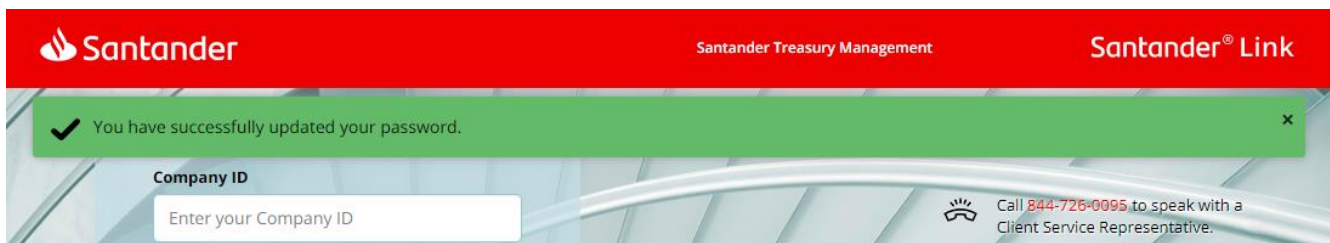
Figure 18: Resetting your password

A message at the top of the page will confirm that your password has been successfully changed. You may now log in with your new password.

Figure 19: Password successfully changed

Regaining access after failing security questions

If you fail 3 times to answer your security questions correctly, your profile will be locked and you will receive a message indicating that your credentials cannot be used. Contact your administrator or the bank to have your profile unlocked. You will then be able to log in, and you will need to select new security questions.
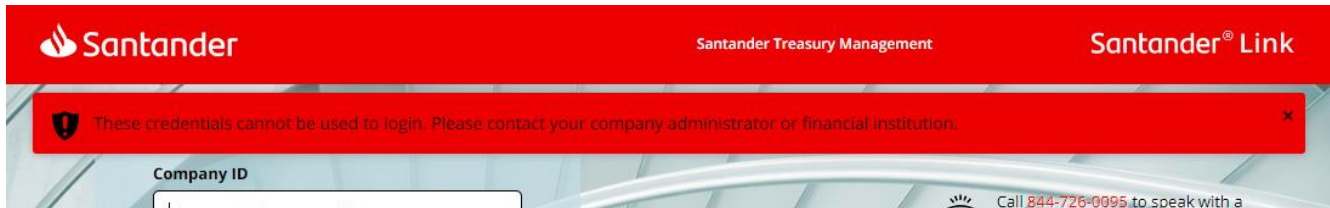

Figure 20: User lockout message

Accessing Santander Treasury Link

To access Santander Treasury Link, click the button.

Figure 21: Opening Santander Treasury Link

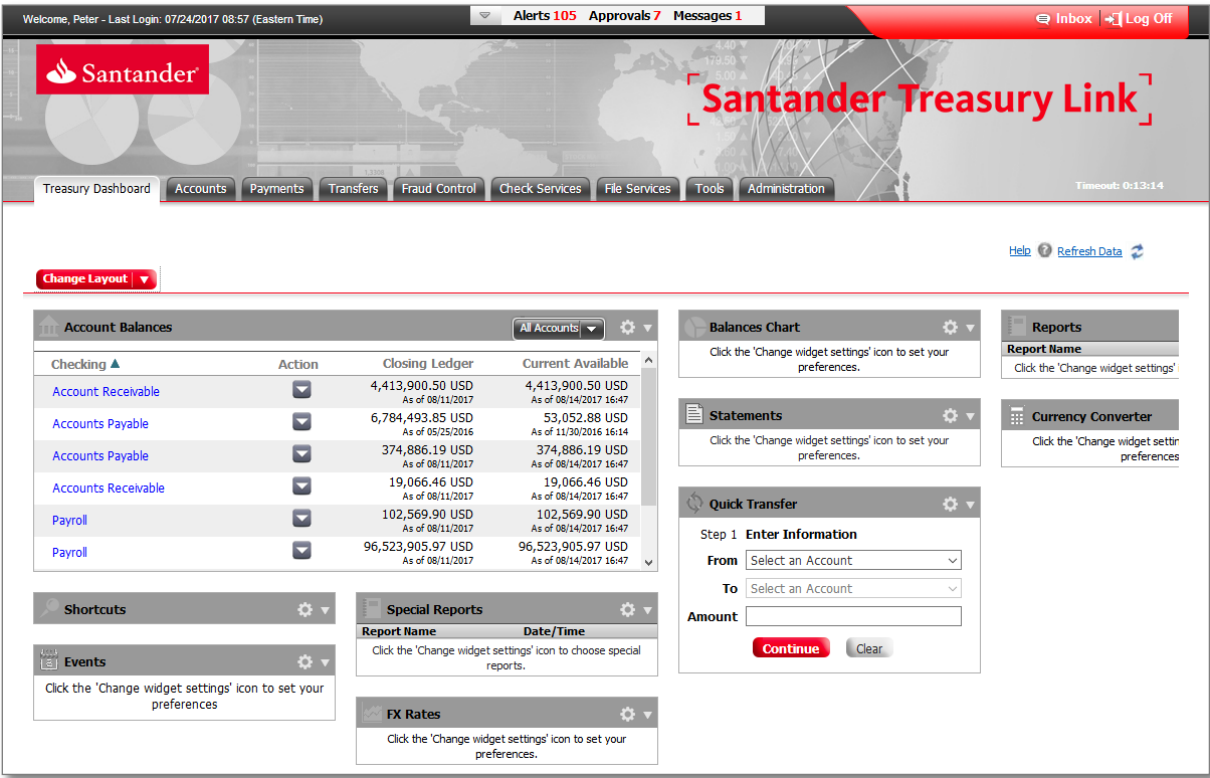The Treasury Dashboard page will open in a separate browser window.

Figure 22: Treasury Dashboard page

You can then access any pages and perform any functions to which you are entitled in Santander Treasury Link.

Accessing other services

To access any other online service, select it from the Santander Solutions menu.

Figure 23: Selecting from the Santander Solutions menu

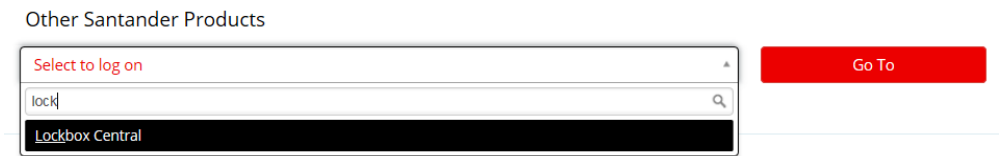You can also type a keyword into the search box to find a service.

Figure 24: Searching for a service

Once you have selected the service, click Go To.

Figure 25: Opening the selected service

The service you selected will open in a separate browser window.

Other resources

The Santander Link page provides other useful resources. The Market Watch section shows real-time quotes for different investment market types.

Figure 26: Market Watch section

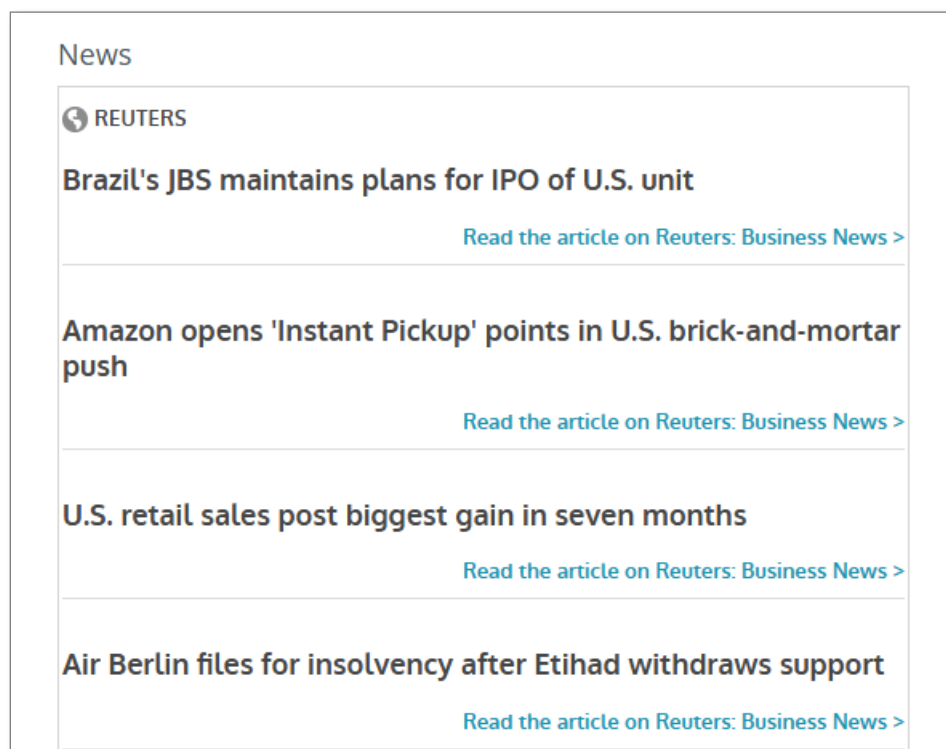The News section offers a selection of recent news articles.

Figure 27: News section

User Administration

The Santander Link administrator landing page is the same as the user landing page, except that there are additional administrative options for managing users and viewing audit history.

Figure 28: Santander Link administrator landing page

The Manage Users function in Santander Link allows administrators to add users, edit user information, and manage user entitlements. To access this function, click the Manage Users link on the landing page.
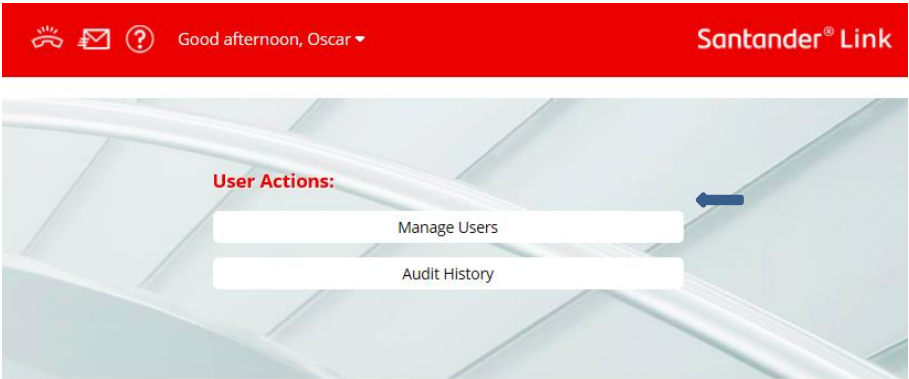

Figure 29: Opening Manage Users

The Manage Users page lists your company's users. You can sort the list by Username, Name, Email, or Last Login by clicking the appropriate heading. Clicking a heading a second time reverses the sort order.
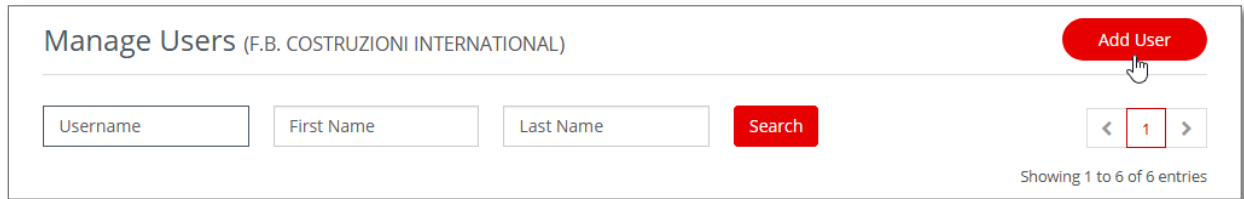
Figure 30: Manage Users page

Adding a user
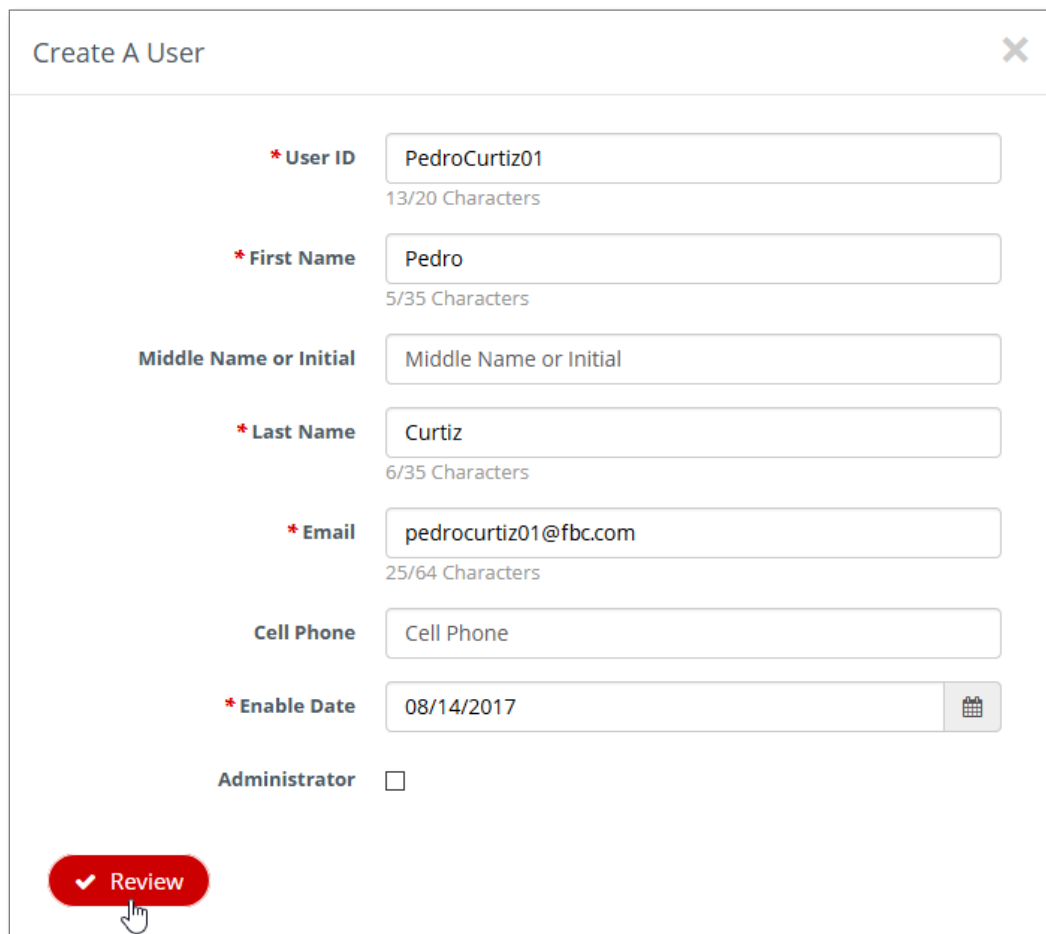
To add a user, click the Add User link on the Manage Users page.

Figure 31: Adding a user

In the Create a User dialogue box, enter all the required (*) information. If the user is to have administrative privileges, check the Administrator check box; otherwise, leave it unchecked. Click the Review button when all information has been entered.

Figure 32: Entering user information

Review the information and click Enroll if it's correct.

Figure 33: Reviewing the user information

A message will confirm that the user has been added, and the new user will appear in the list. Clicking Manage Entitlements will open the Manage Users page for entitling the user (see next section).

Figure 34: User successfully added; opening Manage Users

In addition, two emails will be sent to the new user. One email contains the user's Company ID and User ID, and the other email contains the user's temporary password.

Entitling a user

Once a new user has been added, the user will need to be entitled. Click the gear icon ⚙ at the right end of the entry and select Manage Entitlements from the pop-up menu.
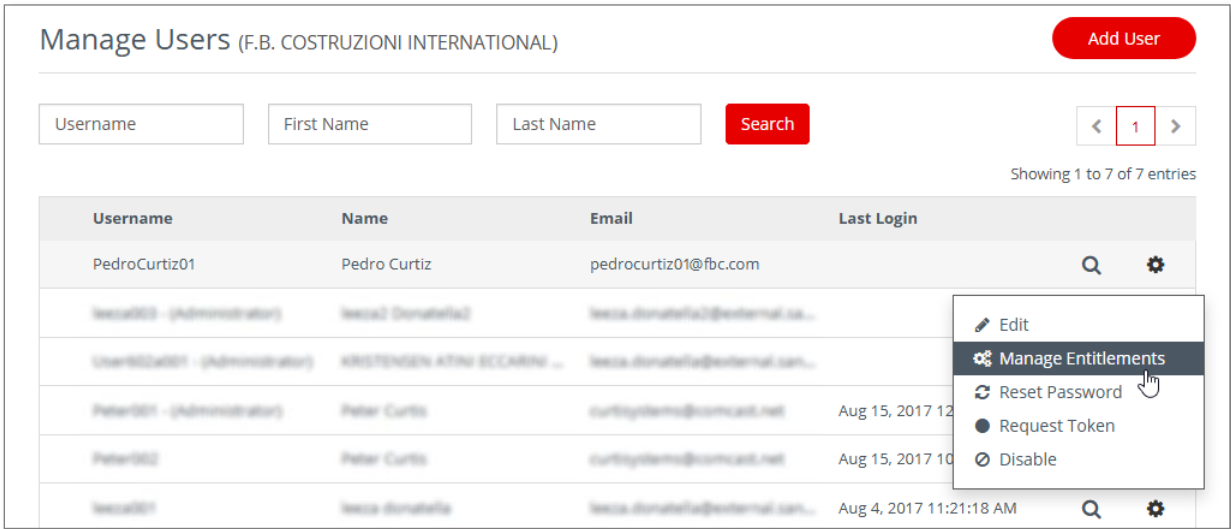

Figure 35: Selecting Manage Entitlements

The Santander Treasury Link Manage Users page will open in a separate browser window. Use the search function to find the new user and click on the User ID.
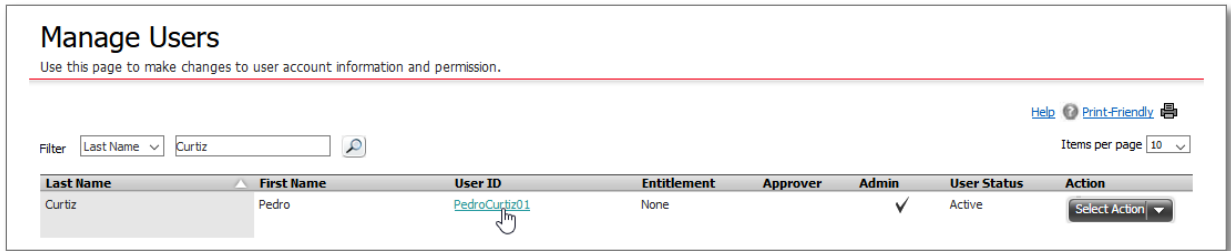

Figure 36: Finding and opening the user

On the View User page, click Edit User.

Figure 37: Opening Edit User

On the Edit User page, set the user's access levels and entitlements as needed. When done, click the red Save button.

Figure 38: Editing the user's entitlements

A message will confirm that the user was successfully modified.
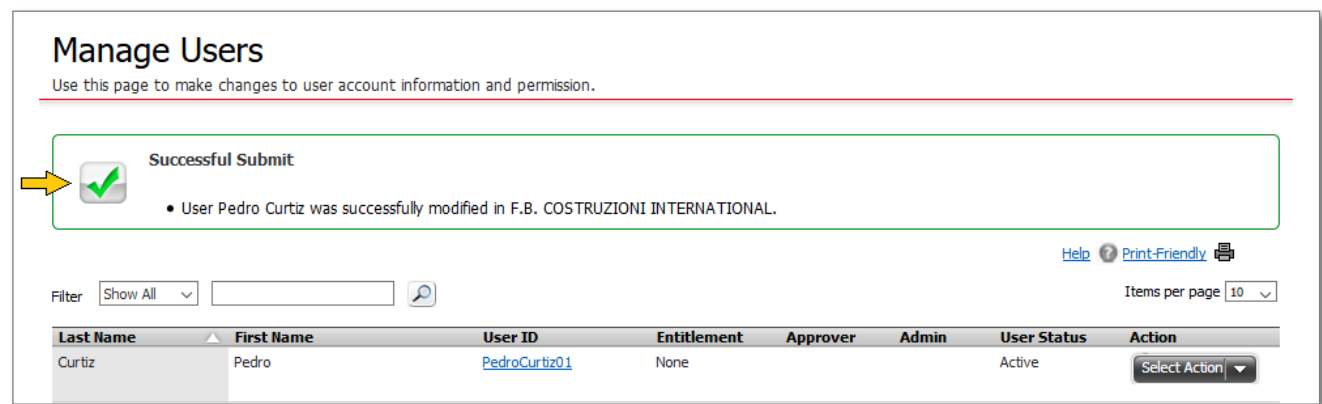
Figure 39: Successful submission

Searching for a user

To search for a user, enter the person's username, first name, and/or last name in the appropriate field in the search function on the Manage Users page. Click Search.

Note: You can use a partial character string as long as the first letter matches the first letter of the name you are searching for.

Figure 40: Searching for a user

The results of the search will appear below.
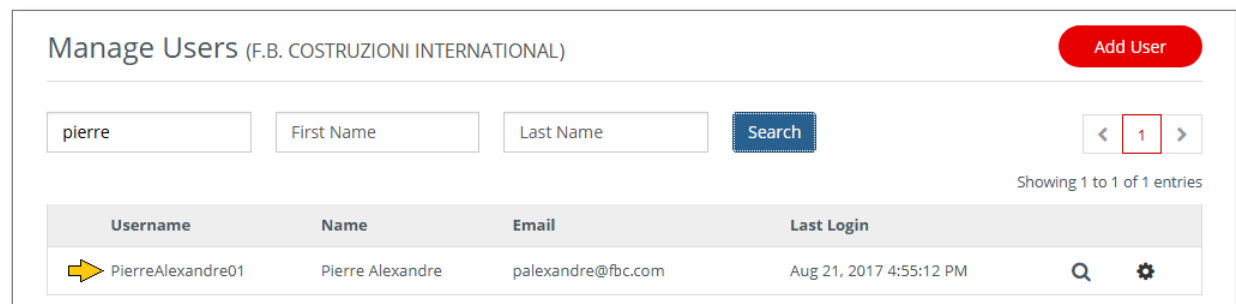
Figure 41: Search results

To clear the search, refresh the page in your browser.

Editing a user

To edit a user's information, click Manage Users.
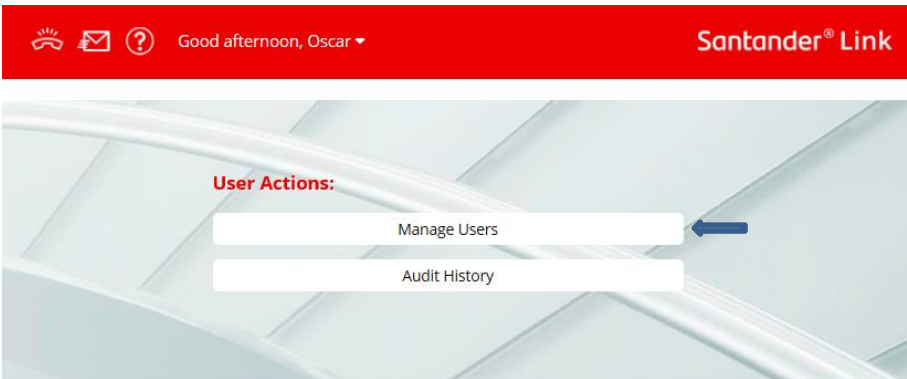
Figure 42: Opening Manage Users

On the Manage Users page, click the gear icon ⚙ at the right end of the user's row and select Edit from the pop-up menu.
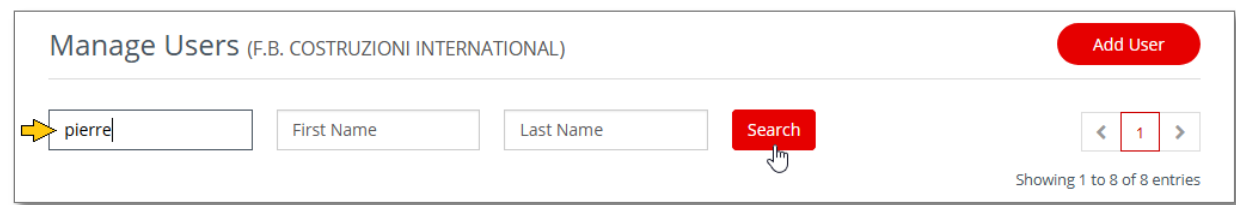

Figure 43: Opening Edit User

In the Edit User dialogue box, you may edit the user's first, middle and last names, email address, phone number, and enable date. You may also select or deselect the Administrator check box. When you're done editing, click Save User.

Figure 44: Editing a user
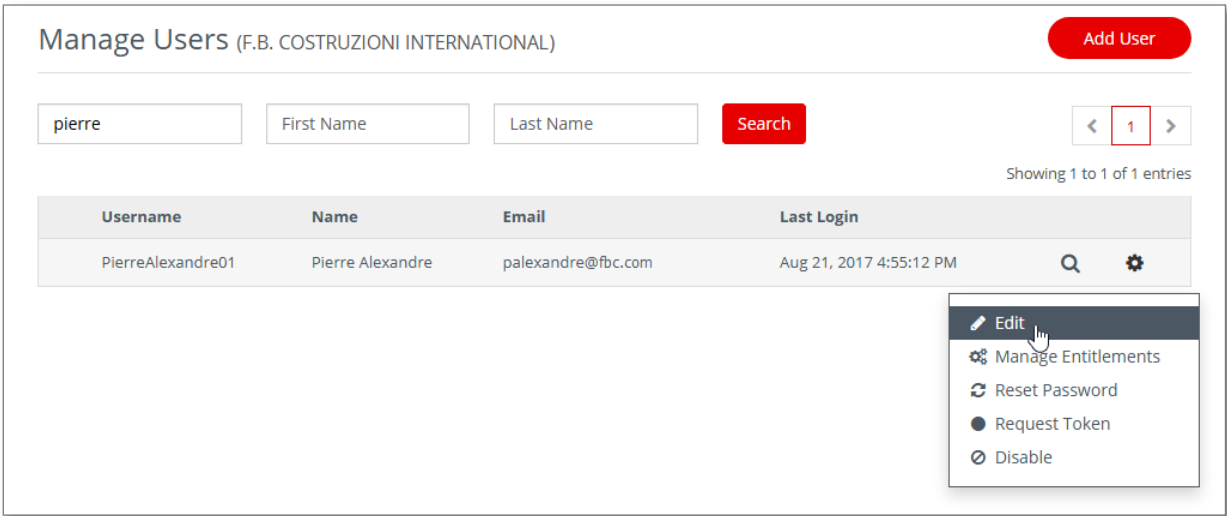
Requesting a token for a user

To request a token for a user, click the gear icon ⚙ at the right end of the user's row on the Manage Users page and select Request Token from the pop-up menu.

Figure 45: Opening Request Token

In the Request Token dialogue box, select the reason for the token request and click Request Token.

Figure 46: Requesting a token for the user

A message will confirm that the token request has been sent.
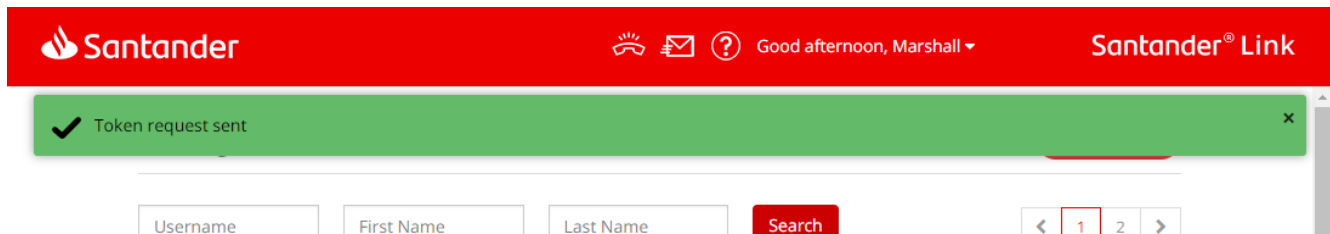
Figure 47: Token request sent

Enabling/disabling a user

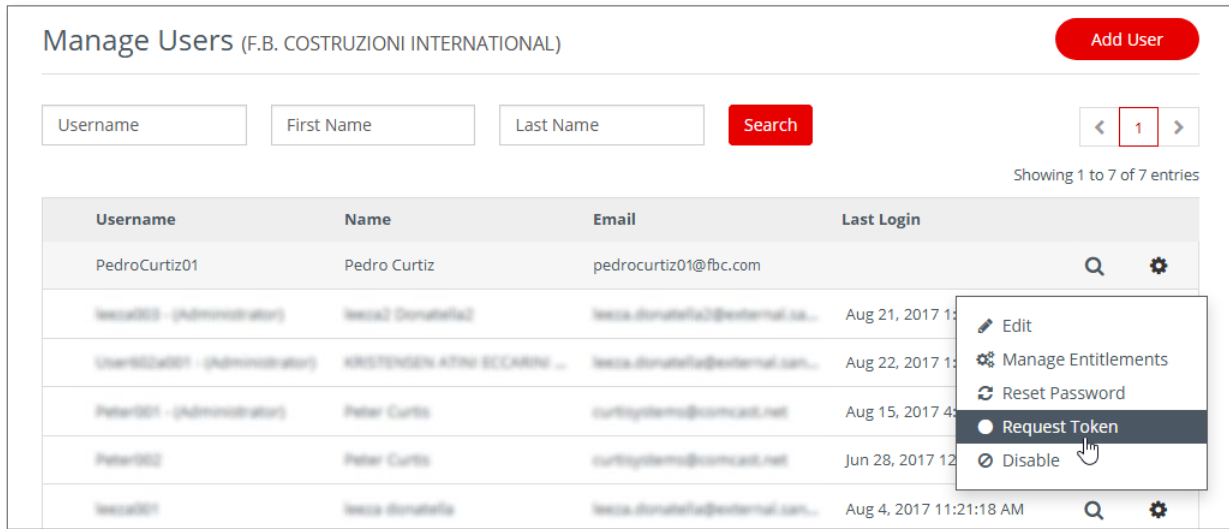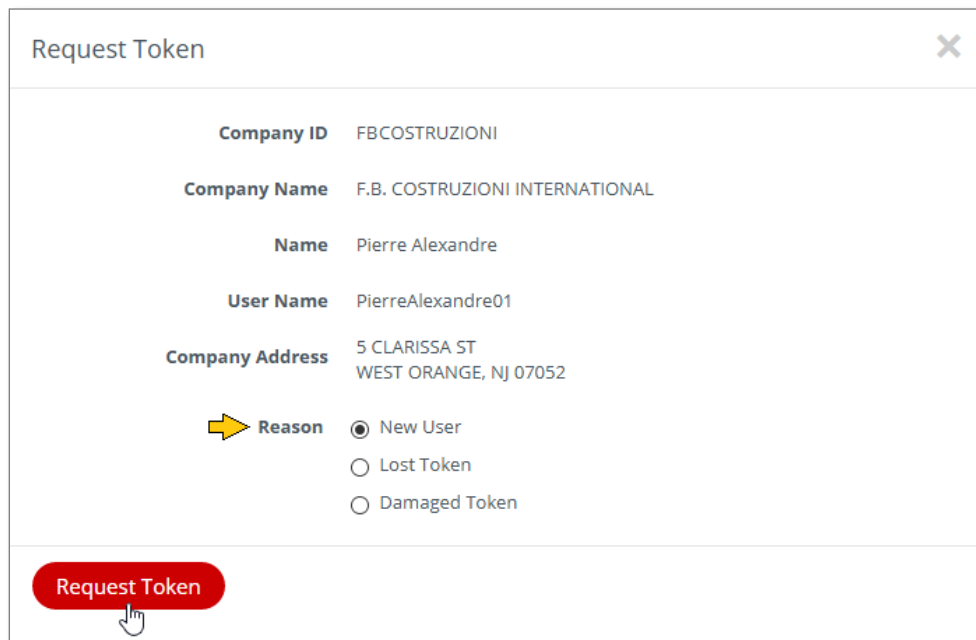This function in Santander Link toggles the enabled/disabled status of the selected user, which in turn controls access to all applications accessible by SSO. To disable a user, click the gear icon ⚙ at the right end of the user's row on the Manage Users page and select Disable from the pop-up menu.

Figure 48: Disabling a user

When a user is disabled, a red ban icon 🚫 appears at the left end of the user's row on the Manage Users page.
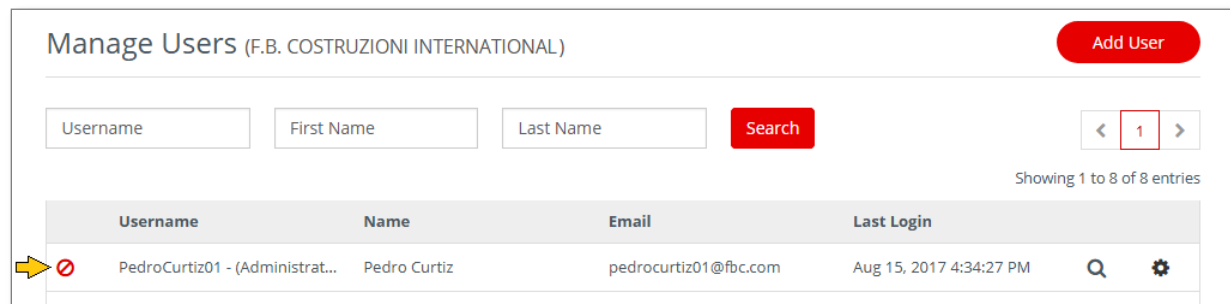
Figure 49: Ban icon indicating the disabled user

To enable a user, click the gear icon ⚙ at the right end of the user's row on the Manage Users page and select Enable from the pop-up menu.

Figure 50: Enabling a user

Resetting a user's password

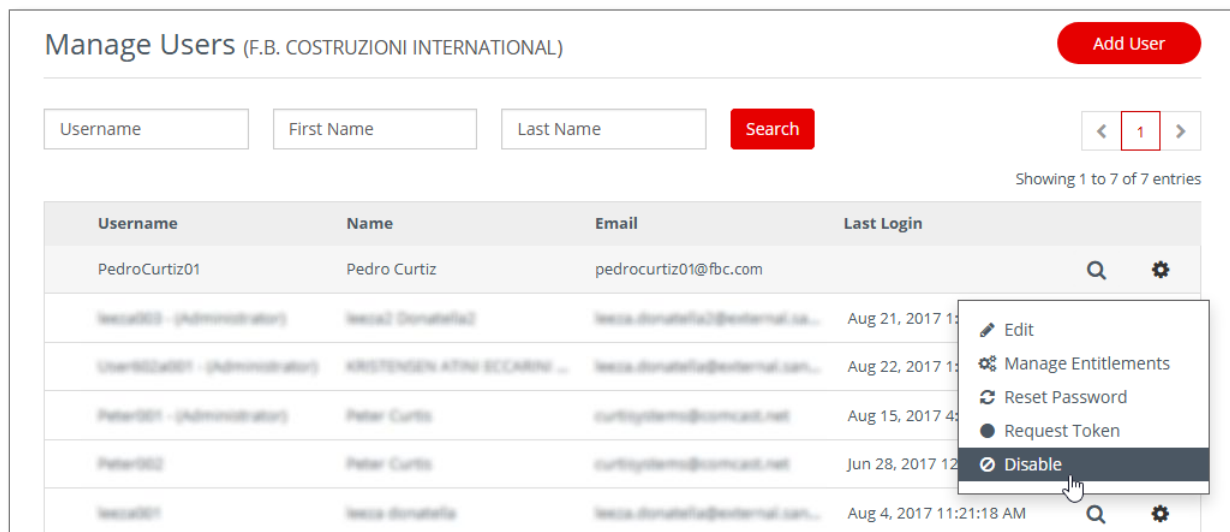To reset a user's password, click the gear icon ⚙ at the right end of the user's row on the Manage Users page and select Reset Password from the pop-up menu.

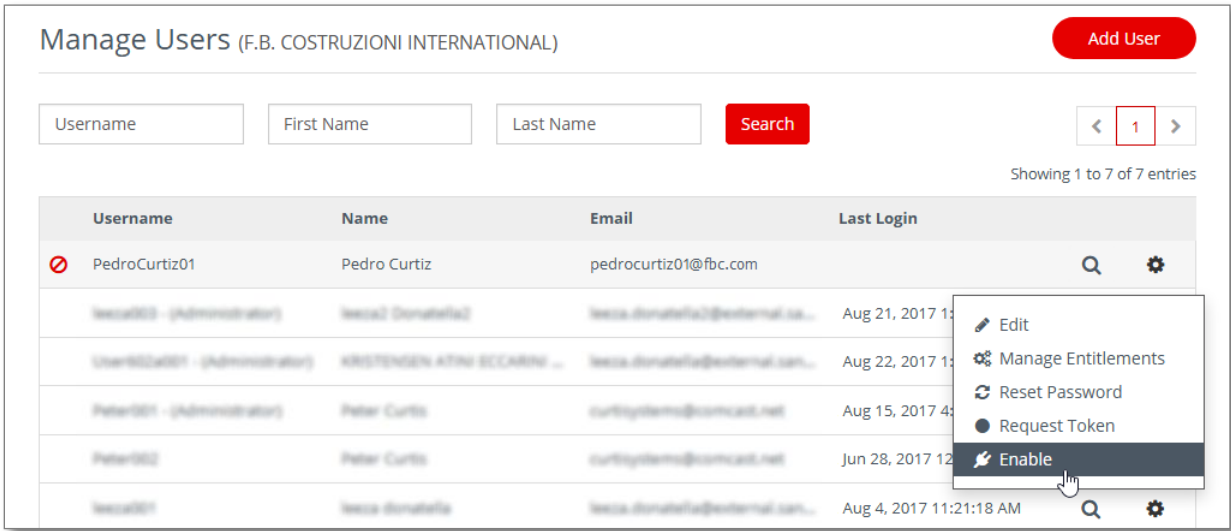*Figure 51: Resetting the user's password*

The user will receive an email with a temporary password. Upon logging in, the user will be requested to change the password.

Unlocking a user

A user can be locked out if they make too many unsuccessful attempts to log in or if they incorrectly answer their security questions.

On the Manage Users page, a padlock icon 🔒 indicates the user has been locked out.
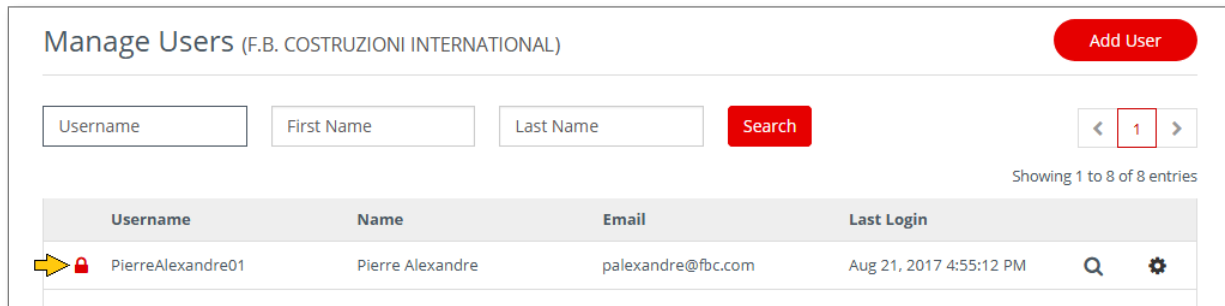
Figure 52: Padlock icon indicating locked-out user

Incorrect password

If the user failed to enter a correct password, the user will be directed to use the Forgot Password? Link.

Note: The user may instead contact the client administrator for a password reset (described above).

Figure 53: User locked out

Upon following the link, the user will be asked to answer one of their security questions.

Figure 54: Security question

After answering the question correctly, the user will be sent a temporary password via email.
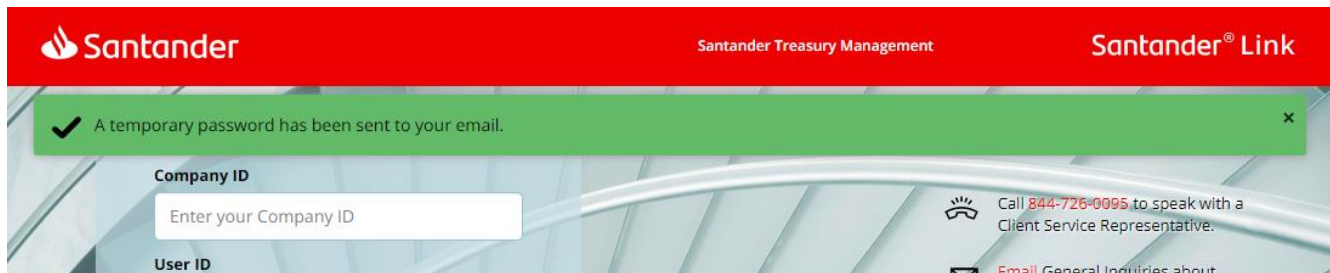
Figure 55: Temporary password sent

The user can then log in using the temporary password. Upon logging in, the user will be requested to change the password.

Incorrect answers to security questions

If the user fails 3 times to answer their security questions correctly, they will receive a message indicating that their credentials cannot be used and that they must contact their administrator or the bank.
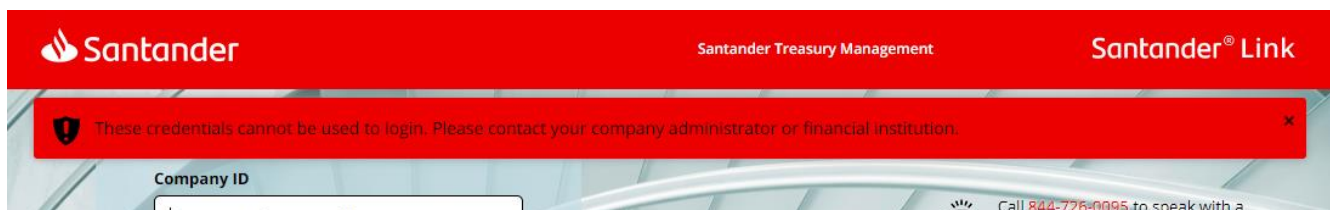
Figure 56: Credentials cannot be used

To unlock the user, click the gear icon ⚙ at the right end of the user's row on the Manage Users page and select Unlock User from the pop-up menu.
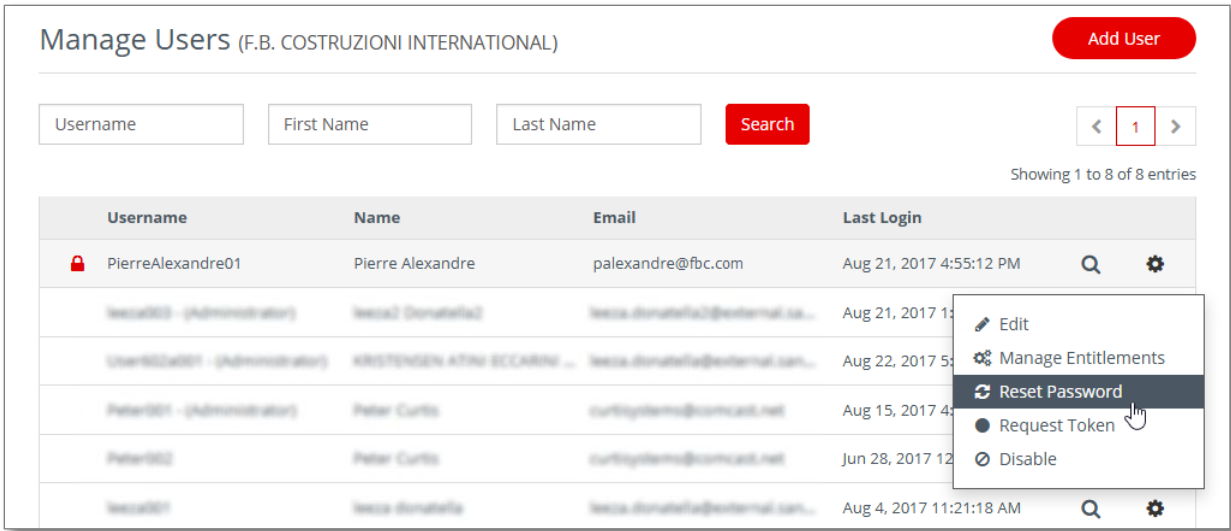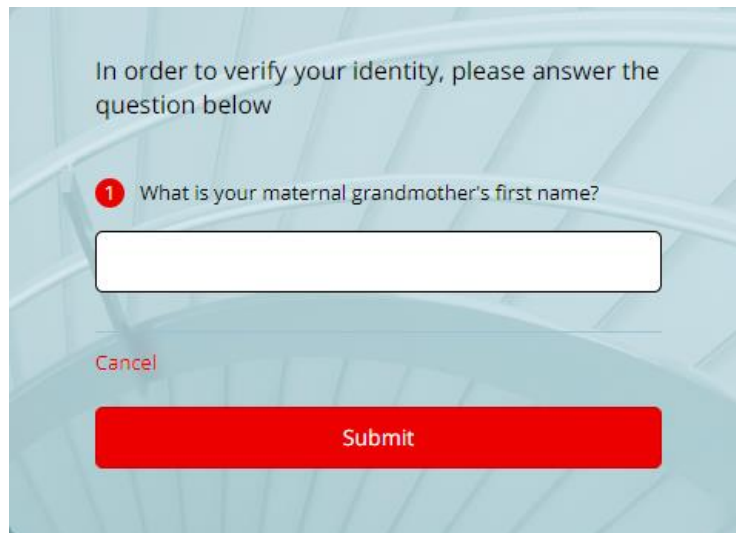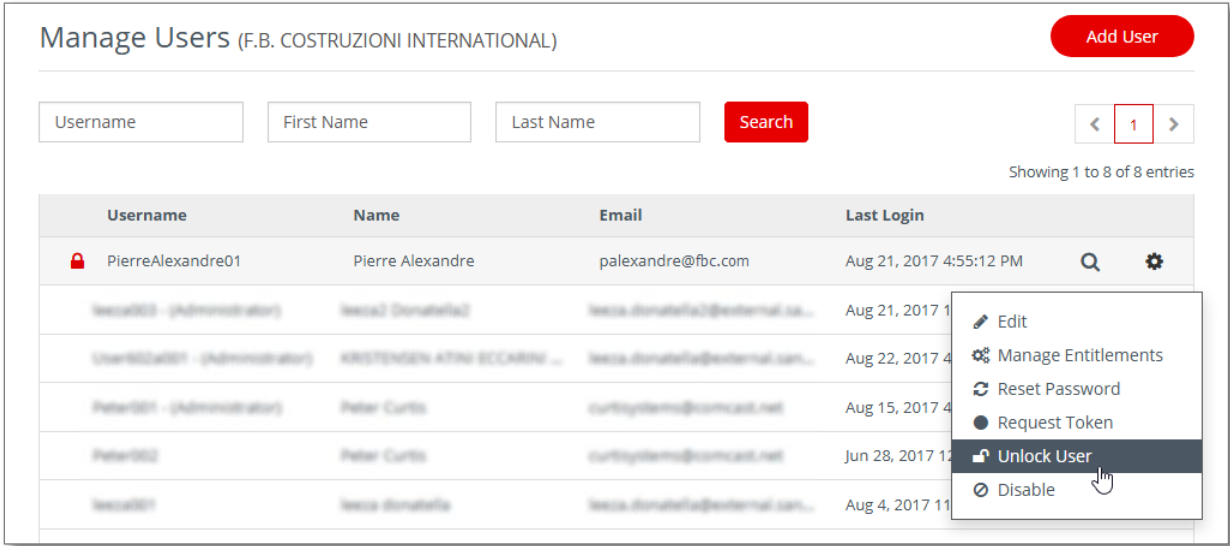
Figure 57: Unlocking the user

The user will then be able to log in and select new security questions.

Using audit history

Audit History provides a record of user actions in Santander Link. To view the actions, click the Audit History link on the landing page.
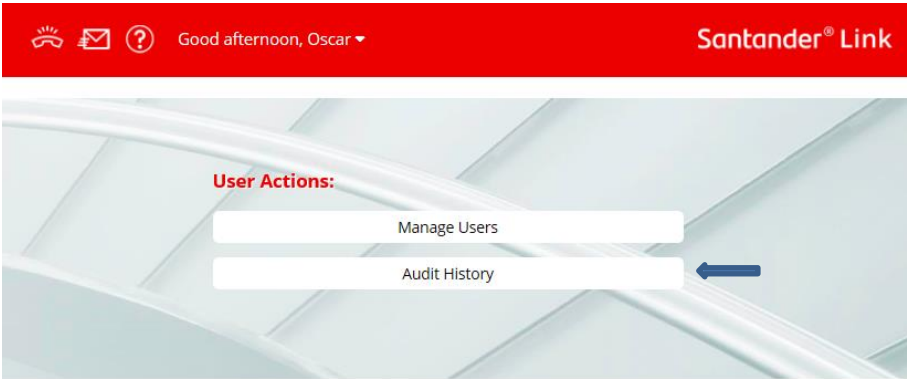
Figure 58: Opening Audit History

By default, the Audit History page shows all actions for the current date since 12:00 AM. If you wish, you can page through the results by using the page buttons.

Figure 59: Audit History default results

To view all actions for a specific time frame, you can do a basic search by date and time.

Figure 60: Selecting date and time

To get more specific results, you can select Advanced Search to enter a User ID and/or a Target User ID.

Figure 61: Using Advanced Search

To view an action, click on the item in the results list.

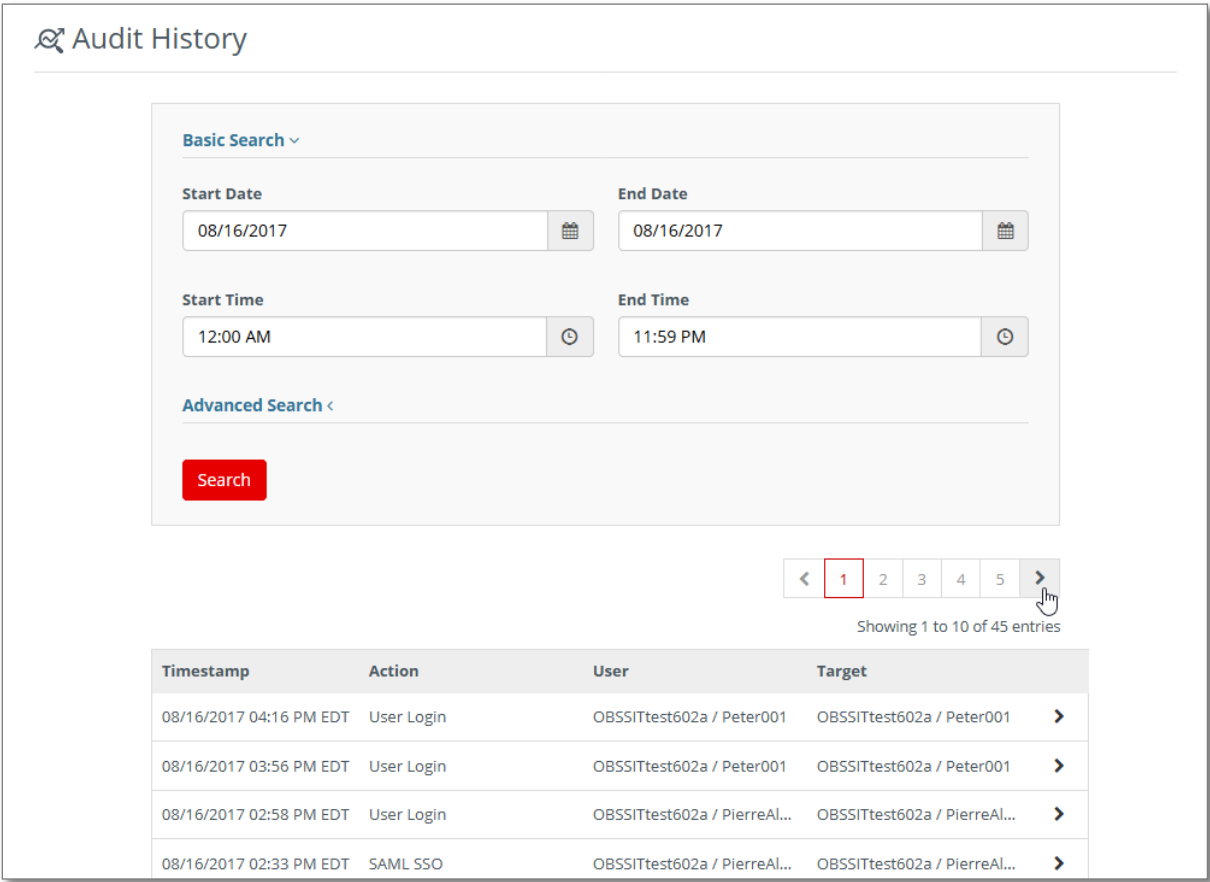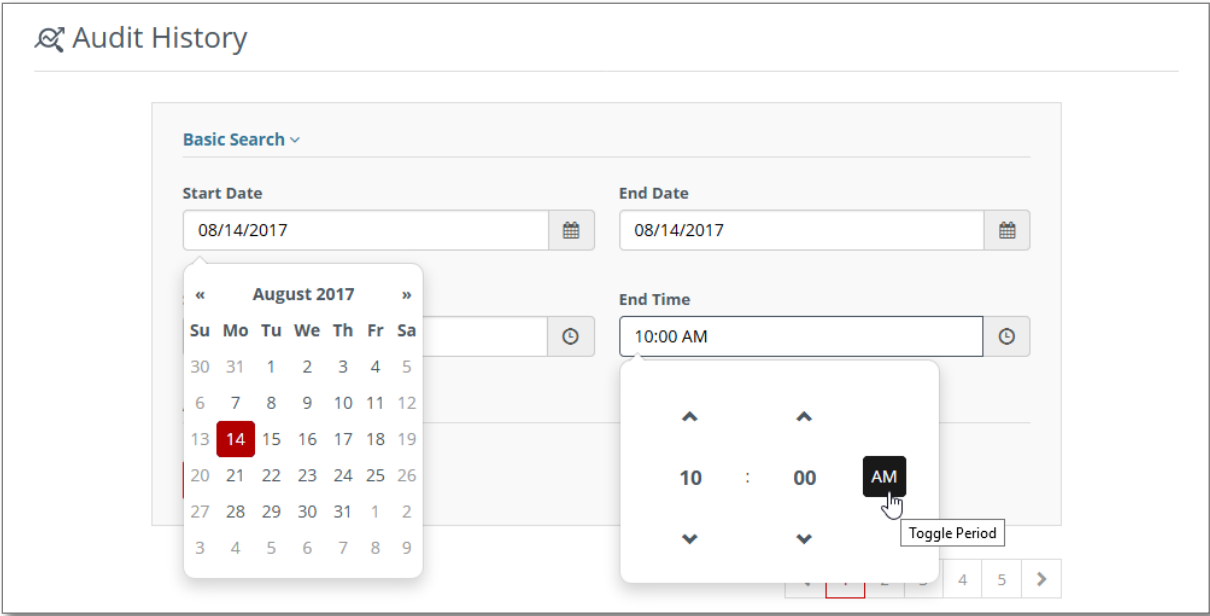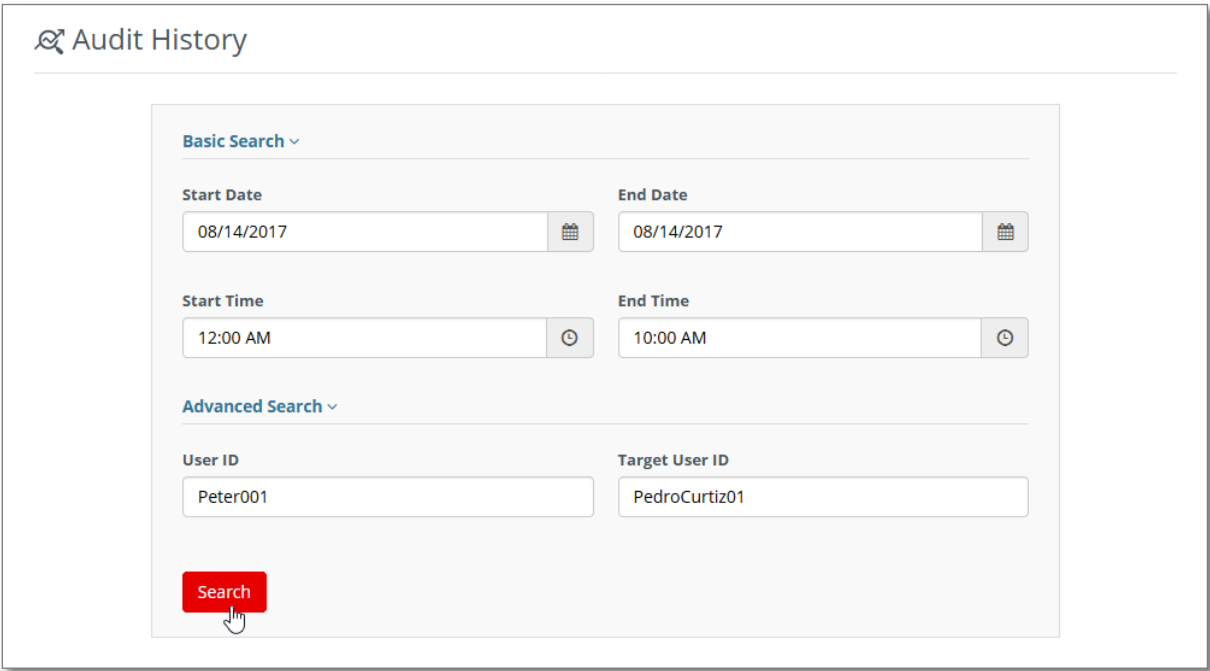| Timestamp	Action	User	Target	
08/16/2017 01:37 PM EDT	Saved User Credentials	OBSSITtest602a / Peter001	OBSSITtest602a / PedroCu...	>
08/16/2017 01:37 PM EDT	Administration For Secure...	OBSSITtest602a / Peter001	OBSSITtest602a / PedroCu...	>
08/16/2017 01:37 PM EDT	Secure Browser Destinati...	OBSSITtest602a / Peter001	OBSSITtest602a / PedroCu...	>
08/16/2017 01:37 PM EDT	Service Updated for User	OBSSITtest602a / Peter001	OBSSITtest602a / PedroCu...	>
08/16/2017 01:37 PM EDT	Service Updated for User	OBSSITtest602a / Peter001	OBSSITtest602a / PedroCu...	>

Figure 62: Results list

The View Audit dialogue box will show the details of the item. Click ✕ or OK to close it.

View Audit

Audit Information

Timestamp	08/16/2017 01:37 PM EDT
Action	Saved User Credentials
User	OBSSITtest602a / Peter001
Target	OBSSITtest602a / PedroCurtiz01

User Credentials

Destination	OBS_UOB_Access
Last Accessed	

OK

Figure 63: View Audit dialogue box