

Online Banking View-Only Access

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What is View-Only access?

When using our services here at Salt & Main Accounting Co., we typically ask for you to supply us with some type of access to your checking, savings, credit card, and loan accounts. Most banks will have a view-only account feature built right into your online business banking portal. This feature allows you to add us as a user to your online banking portal **limiting us to only being able to view statements and check images.**

Why does Salt & Main Accounting Co. need access to statements and check images?

There is no need for us to be able to process transactions within your online accounts. We only need the ability to view historical transactions, retrieve statements, and occasionally take a look at a check image for more detail. But why would we need to do that? View-only access allows us to quickly reconcile your accounts and see statements every month **without having to ask you to provide these details regularly.**

Is this secure?

While being able to view your account statements and check images is a huge time saver for both of us, we also recognize the need to keep your accounts secure and safe. While we take extreme measures to ensure our connection is secure, we also understand the potential for fraudulent activities. By limiting our ability to make transactions on your behalf, we ensure that your assets will remain secure in the unfortunate event that we are victims of fraud.

How do I setup View-Only access for my account manager?

Every bank is different, and the best solution is to call your local branch for assistance and they will walk you through the process. They will most likely ask you to provide a username and password for your account manager to use, so **please reach out to us directly before contacting your bank as we will be able to provide these details in advance.**
