

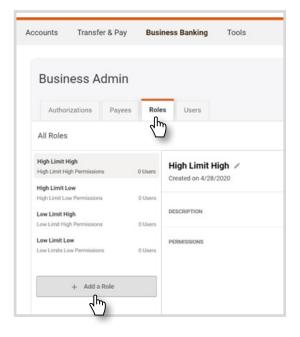
## **User Management**

If you are the Master User for your business within online banking, you have rights to create and manage additional users, or sub-users. This is extremely helpful if you have other individuals within your organization that help you manage the company finances, such as an accountant or payroll clerk.

# **Creating a User Role**

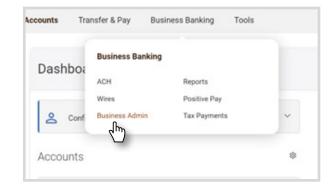
#### STEP 01/07

From the top menu, click or tap Business Admin.



#### STEP 03/07

Enter a Role Name and a brief Description. Then click or tap **Create Role**.



#### STEP 02/07

Click or tap the **Roles** tab. Then choose **Add a Role**.

	Add a new role $\qquad \qquad \qquad$
Role Name *	Name this role
Description *	Describe the role
	200 character max limit
	Cancel Create Role





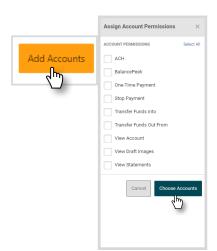
PERMISSIONS		:= ::	
		ADMINISTRATION	Select All
	Ŧ	Manage Users and Roles Manage Payees	5
		ALLOWED TO AUTHORIZE	Select All
		Allowed to Authorize Transfers	
		TRANSFERS	Select All
		Add External Transfer Account Add Customer To Customer Transfer	Account
		MISCELLANEOUS	Select All
		View eDocuments	
		Remote Deposit Capture	
		Edit Business Contact Information	
		Save Changes Cancel	

## STEP 04/07

Add the Permissions that will be assigned to all users assigned to this Role.

You can choose **Select All** to select all Permissions within a certain category, or select Permissions individually.

Click or tap Save Changes.



#### STEP 05/07

Click or tap the **Add Accounts** button. Select the desired Permissions and click or tab on **Choose Accounts**.

To add account-specific permissions, complete these steps separately for each account.

nternal	External	Selected (2)	Search Accounts
		_	

#### STEP 06/07

Select the Internal and External Accounts to provide access to Users assigned this Role then click or tap the **Assign Accounts** button.

	DESCRIPTION	DAILY	WEEKLY	MONTHU
ACH Collections				
ACH Payments				
External Transfers				
Internal Transfers				
Wire Transfers				

### STEP 07/07

Scroll to the limits section and select **Edit Limits** and select the payment/transfer methods enabled for this Role. Then, enter limits to these methods and select **Save Changes** to save the permissions.

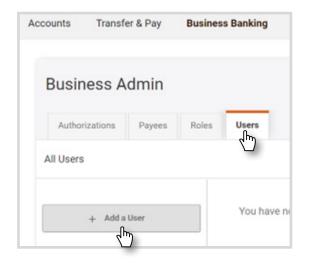
Follow these steps to Manage exisiting Roles as well.



## **Creating a New User**

### STEP 01/03

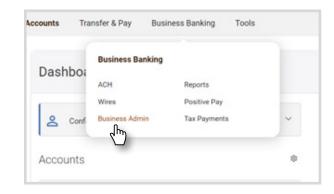
From the top menu option Business Banking, Select **Business Admin**.



#### STEP 03/03

Fill in the sub-users information on the Add a new user page. Assign the sub-user a Role. Then, click or tap **Create User**.

Visit the Users tab in the Business Admin widget to edit or remove sub-users as well.



#### STEP 02/03

Click or tap the **Users** tab. Then select **Add a User**.

	Add a new user
Username *	Username  Please enter at least 1 characters.
First Name *	First name
Last Name *	Last name
Email *	Email A temporary password will be sent to the above email address.
Role *	Subuser-ViewOnly v
	Cancel Create User

