

Create and Manage Users

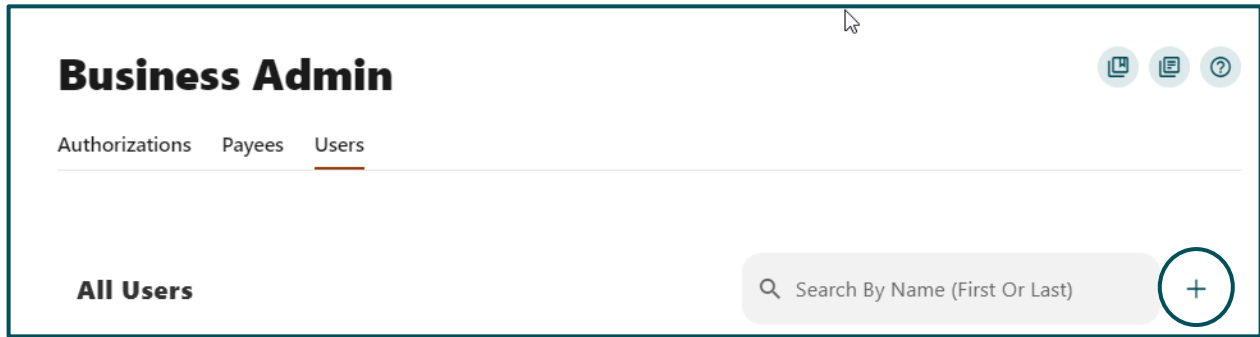
CREATE A NEW USER

STEP 01/08

Navigate to **Business Banking** → **Business Admin** → **Users**.

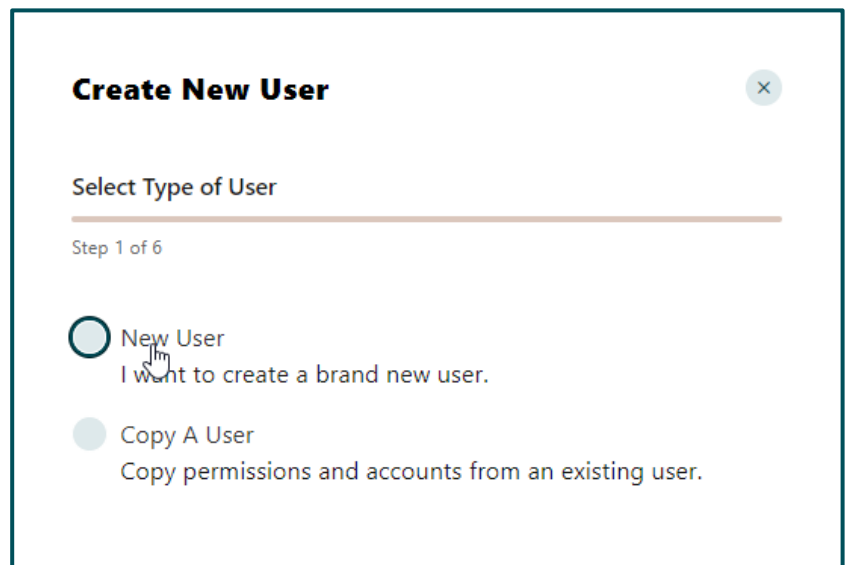
STEP 02/08

Click on the “+” symbol on the right-hand side or click on “add user”.



STEP 03/08

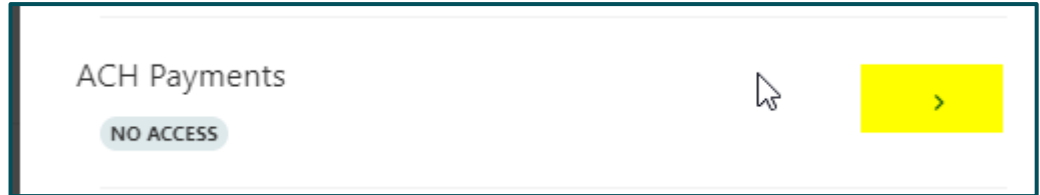
Select “New User” if you want to create a brand-new user with customized access or “Copy A User” if you want them to have similar rights to an existing user.



STEP 04/08

Fill out the new user's personal information and assign **Permissions** and **Limits** for that user.

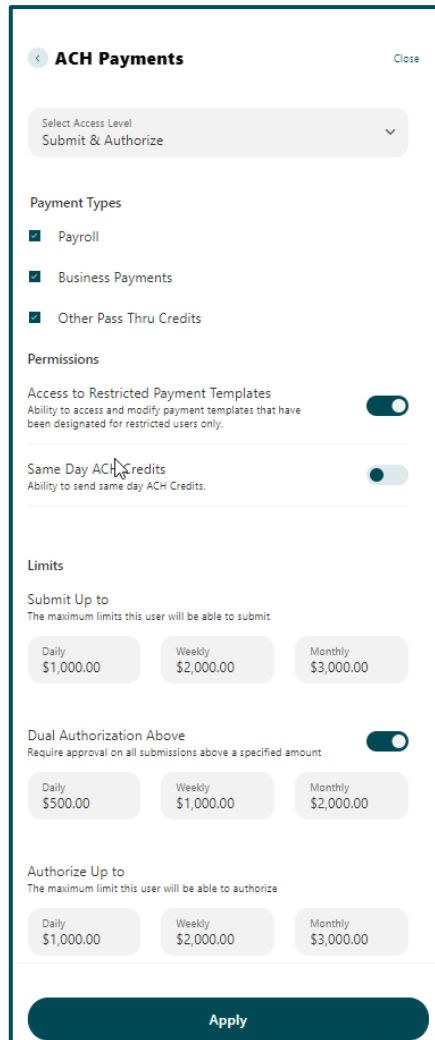
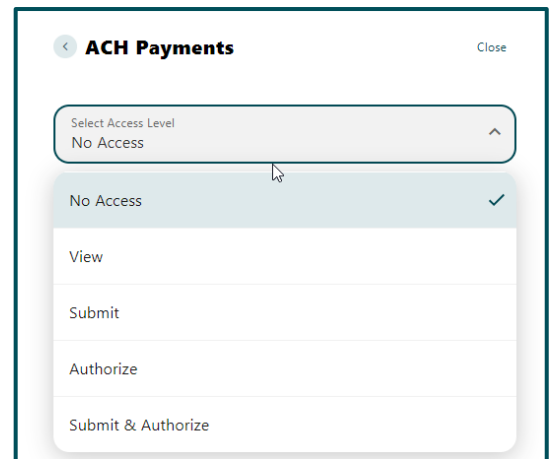
When setting limits, click on the ">" on the payment type you'd like to give access to.



Select the type of access you'd like to assign to the new user.

Note: Authorize would be in cases of dual control.

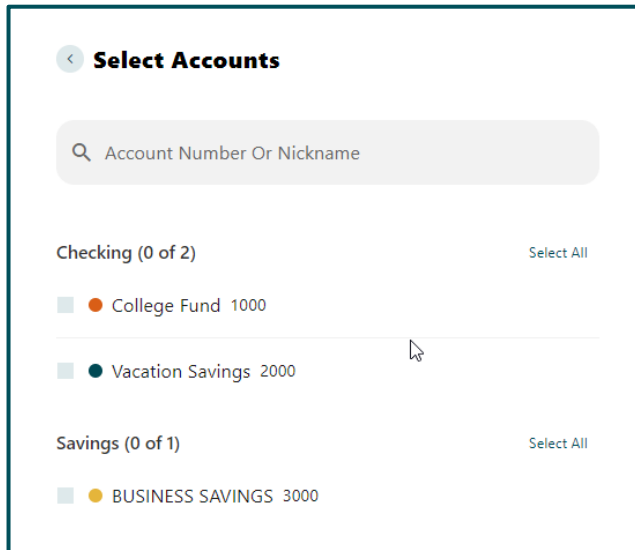
Complete the remaining fields and assign **payment types**, **permissions**, and **limits**.



STEP 05/08 – SELECT ACCOUNTS

Select the accounts you'd like the new user to have access to. These will be separated by category (Checking, Savings, Loans, etc.).

Click on "select all" if you wish to grant access to all accounts.

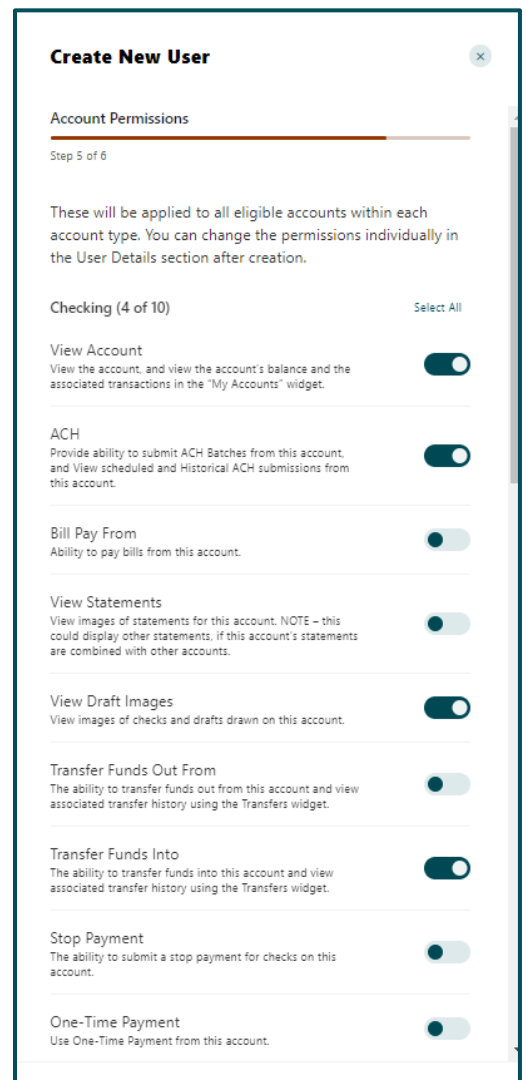


STEP 06/08 – GRANT ACCOUNT PERMISSIONS

Select the type of access you'd like to grant to each account.

Click on "select all" if you wish to grant access to all.

Note: If accounts within the same category need different permissions, you can edit after the initial setup of the user.



STEP 07/08

Review the information and ensure permissions are set up accurately.

Then, hit "submit".

STEP 08/08

Provide the new user with the username you've selected for them.

Their first temporary password will be sent to the email address selected.

EDIT AN EXISTING USER

STEP 01/03

Navigate to **Business Admin** → **Users**.

STEP 02/03

Click on the **name of the user you want to edit**.

STEP 03/03

Navigate to the tab you'd like to edit.

General Permissions – Administration Rights, Template Management, Payment Permissions

Payment Permissions – Payment Limits

Account Access – Access to each account

