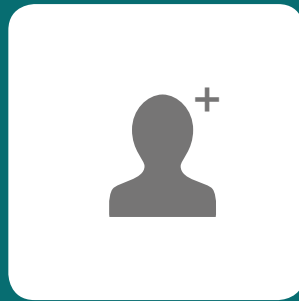


Business Administration

Online Banking User Guide

Get started with



Additional Users

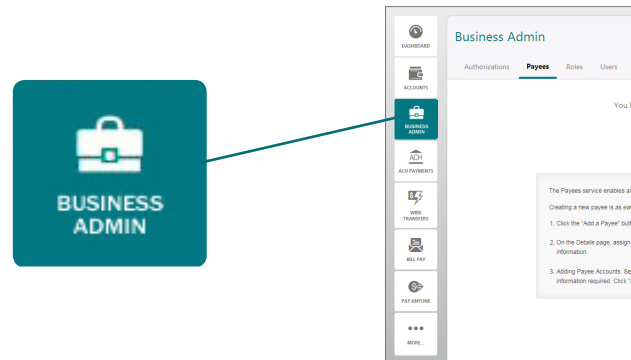
Need to give access to
another user?

Follow the steps on
pages 1 - 4

Additional User Setup

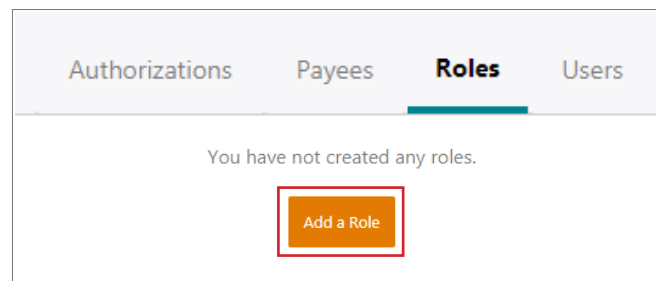
Step 1

Select the **Business Admin** widget from the left menu. (If you do not see the widget, select **More**, then select **Business Admin**)



Step 2

Click the **Roles** tab, and then click **Add a Role**.



Step 3


Enter the Role Name & Description, then click the **Create Role** button. You may be required to provide additional verification.

A screenshot of a dialog box titled 'Add a new role'. It has a close button (X) in the top right corner. There are two input fields: 'Role Name *' with the placeholder text 'Name this role' and 'Description *' with the placeholder text 'Describe the role'. Below the description field, it says '200 character max limit'. At the bottom of the dialog are two buttons: 'Cancel' and 'Create Role', with the 'Create Role' button highlighted with a red border.A screenshot of a dialog box titled 'Verification Needed' with a close button (X) in the top right corner. The text inside reads 'Please verify your identity before completing this action.' At the bottom, there are two buttons: 'Questions' with a question mark icon and 'Email' with an '@' icon.

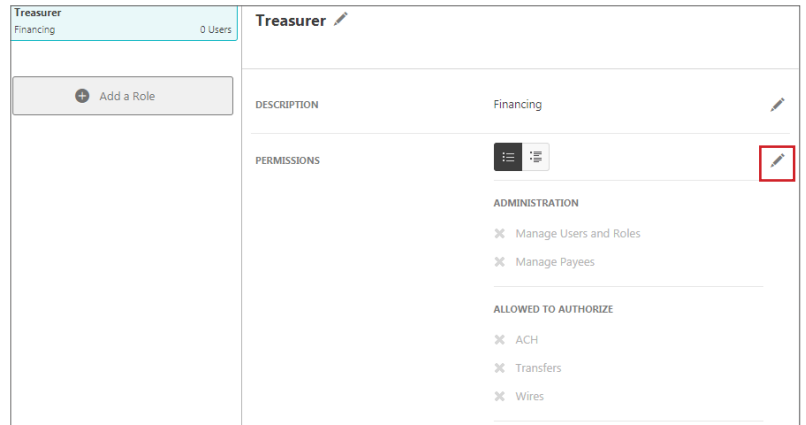
Additional User Setup

Steps 4 - 7 will explain how to setup roles, assign permissions, link accounts and assign dollar limits. Note: To create additional roles, repeat steps 1 - 3.

Step 4

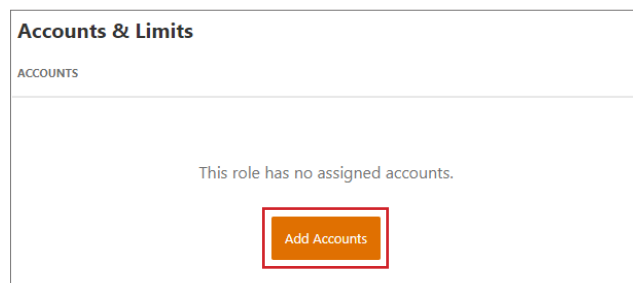
With your role saved, you can now customize the permissions for this new role. Click the **Pencil Icon**  so you can enable authorizations needed for this specific role.

Note: The pencil icon can be selected to make future changes.



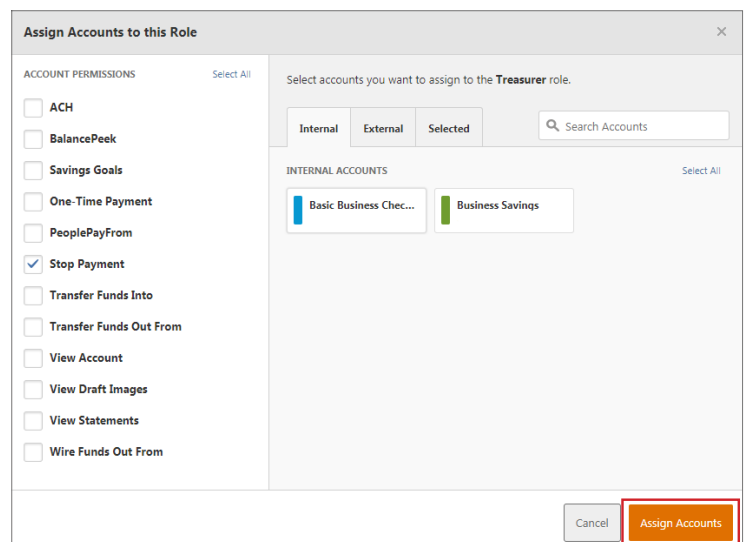
Step 5

Next, scroll down and click **Add Accounts**.



Step 6

Select the account permissions for this role, and which accounts to assign to this role. Then click **Assign Account(s)**.

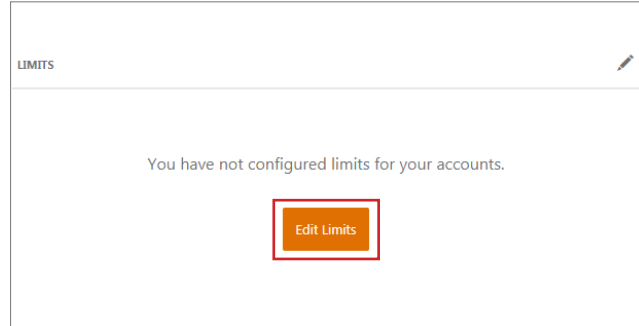


Additional User Setup

Step 7

Next, click **Edit Limits** to set the dollar limits on each account. Once you have your settings in place, click **Save Changes**.

Note: Permissions must be assigned before editing limits.



METHOD	DESCRIPTION	DAILY	WEEKLY	MONTHLY
<input type="checkbox"/>	ACH Collections			
	Authorized limit	0	0	0
	Max limit	0	0	0
<input type="checkbox"/>	ACH Payments			
	Authorized limit	0	0	0
	Max limit	0	0	0
<input type="checkbox"/>	External Transfers			
	Authorized limit	0	0	0
	Max limit	0	0	0
<input checked="" type="checkbox"/>	Internal Transfers			
	Authorized limit	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	Max limit	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
<input checked="" type="checkbox"/>	Wire Transfers			
	Authorized limit	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
	Max limit	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

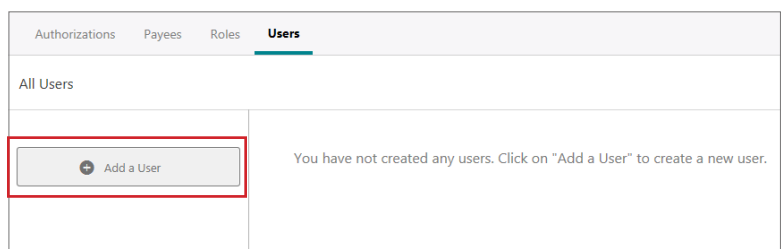
Authorized limit: Max amount that can be submitted without additional authorization or approval.
Max limit: Max amount users with this role are able to submit.
Can authorize: Max amount users with this role can authorize for other users.

Save Changes

Steps 8 - 10 will explain how to create a user. Note: To create additional roles, repeat steps 2 - 7.

Step 8

Click on **Users** tab, then click **Add a User**.



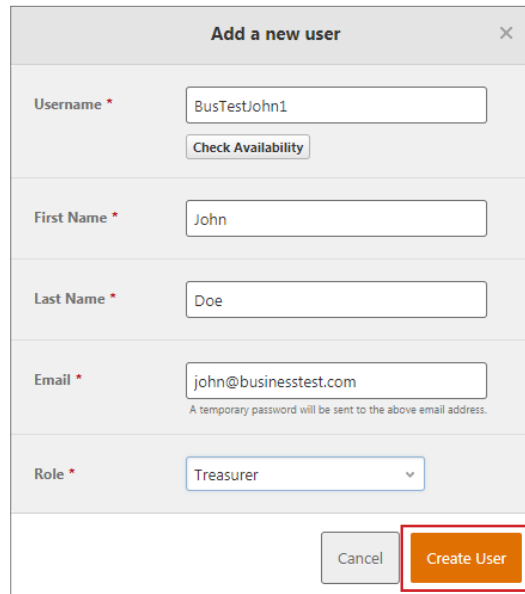
Additional User Setup

Step 9

Enter the following information:

- Username
- First Name
- Last Name
- Email
- Assign the role you wish this user to have, that you created in steps 1-7

Then click **Create User**.



The screenshot shows a form titled "Add a new user" with a close button (X) in the top right corner. The form contains the following fields:

- Username ***: A text input field containing "BusTestJohn1" and a "Check Availability" button below it.
- First Name ***: A text input field containing "John".
- Last Name ***: A text input field containing "Doe".
- Email ***: A text input field containing "john@businesstest.com" with a note below it: "A temporary password will be sent to the above email address."
- Role ***: A dropdown menu with "Treasurer" selected.

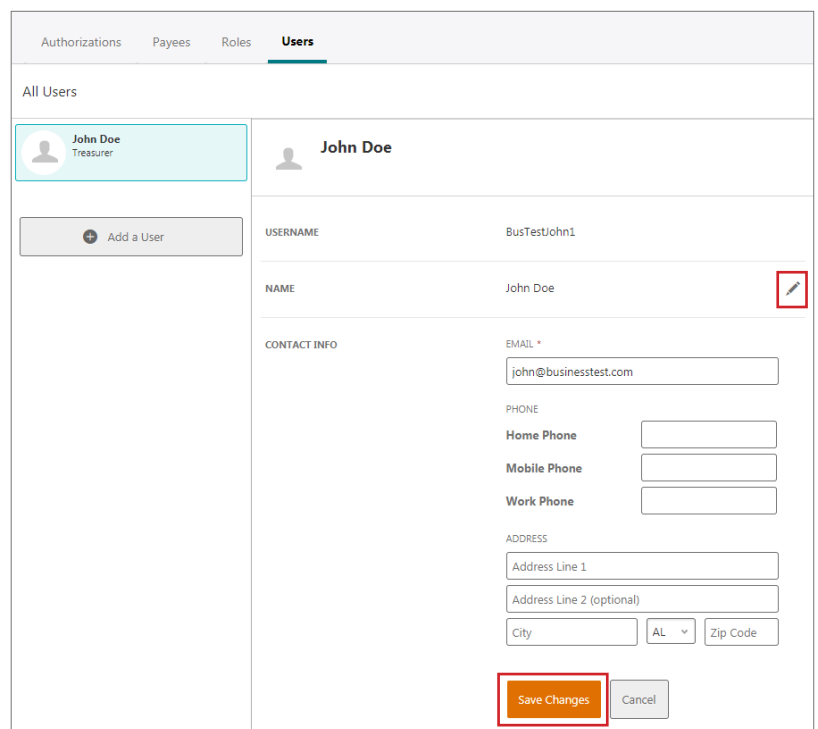
At the bottom right of the form are two buttons: "Cancel" and "Create User". The "Create User" button is highlighted with a red box.

Step 10

Enter as much information about your authorized user as possible including phone number and address:

- Name
- Contact Info (optional)

Then click the **Save Changes** button.



The screenshot shows the "Users" management page. At the top, there are tabs for "Authorizations", "Payees", "Roles", and "Users". Below the tabs, there is a section for "All Users" with a list of users. One user, "John Doe" (Treasurer), is selected and highlighted in blue. Below the list is an "Add a User" button.

The main content area shows the details for "John Doe":

- USERNAME**: BusTestJohn1
- NAME**: John Doe (with an edit icon in a red box)
- CONTACT INFO**:
 - EMAIL ***: john@businesstest.com
 - PHONE**:
 - Home Phone: [input field]
 - Mobile Phone: [input field]
 - Work Phone: [input field]
 - ADDRESS**:
 - Address Line 1: [input field]
 - Address Line 2 (optional): [input field]
 - City: [input field] | AL | Zip Code: [input field]

At the bottom right of the details section are two buttons: "Save Changes" (highlighted with a red box) and "Cancel".