Bethpage™
Federal Credit Union
We care about what you care about.℠

Business Administration

Online Banking User Guide

Get started with

Additional Users

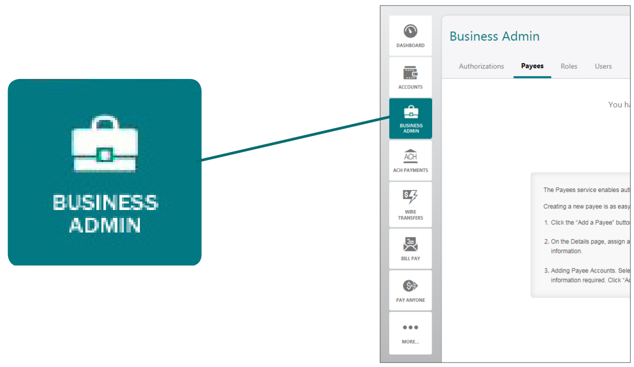
Need to give access to
another user?

Follow the steps on
pages 1 - 4

Additional User Setup

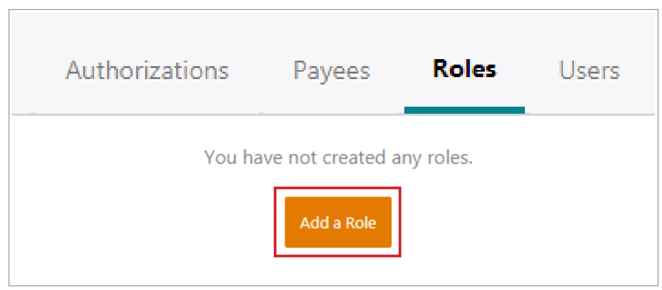
Step 1

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



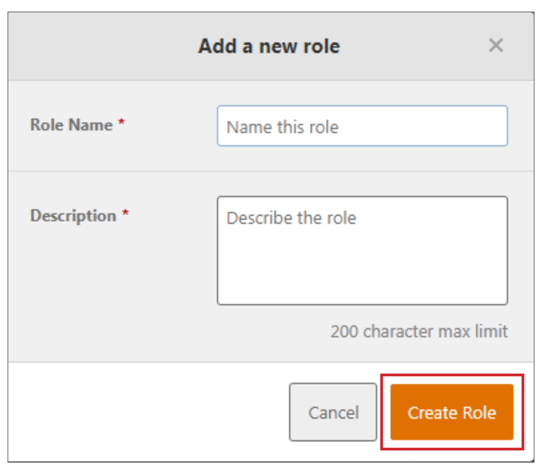
Step 2

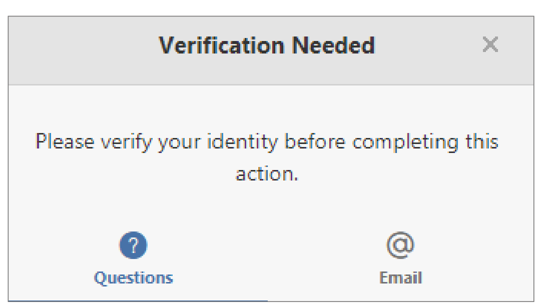
Click the **Roles** tab, and then click **Add a Role**.



Step 3

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





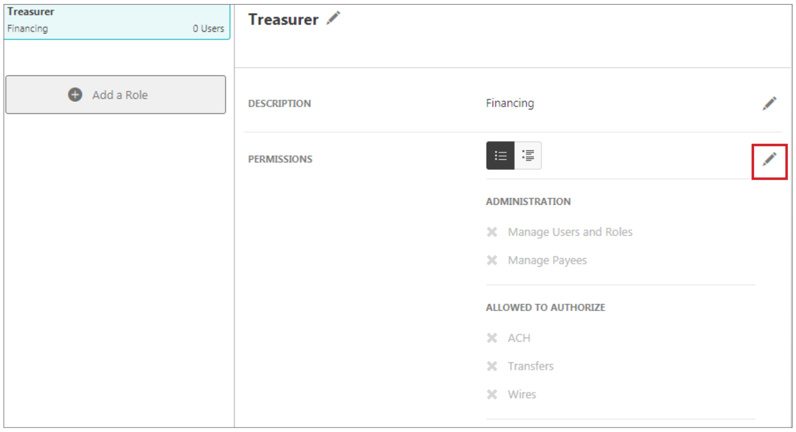
Additional User Setup

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

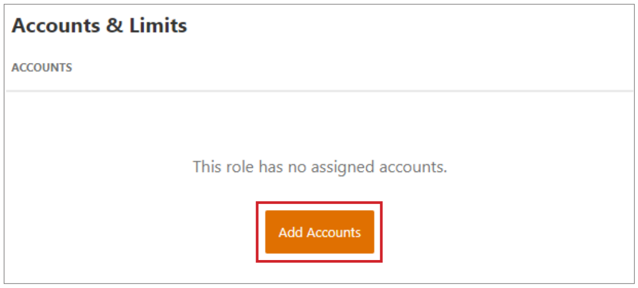
With your role saved, you can now customize the permissions for this new role. Click the **Pencil Icon** so you can enable authorizations needed for this specific role.

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



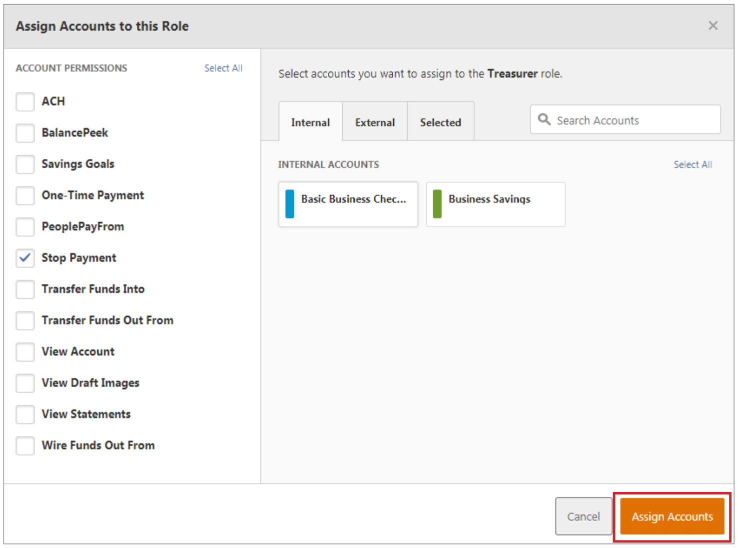
Step 5

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).

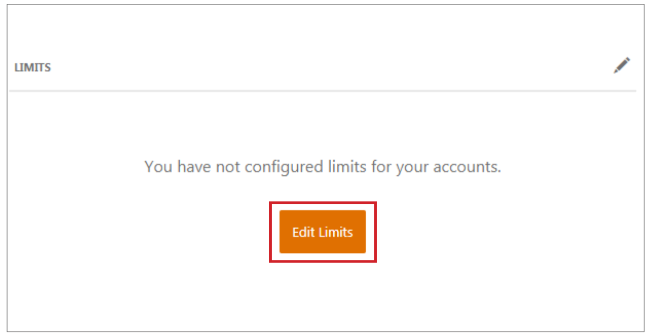


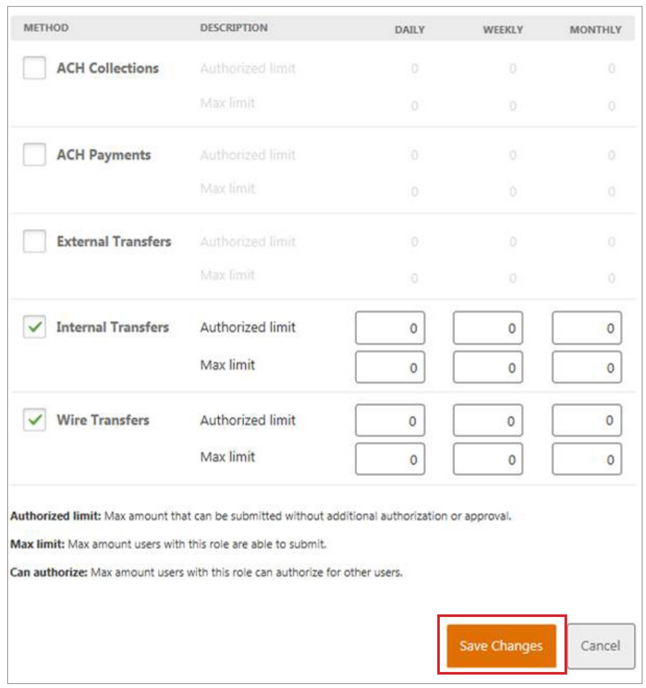
Additional User Setup

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.

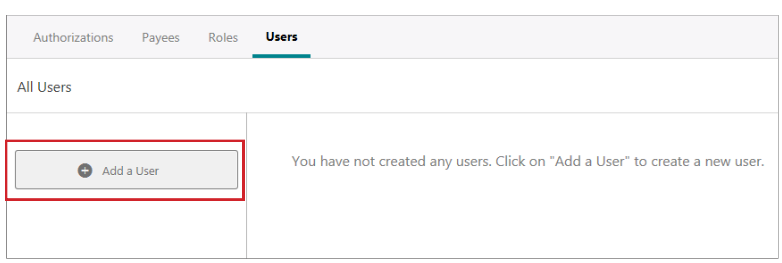




Steps 8 - 10 will explain how to create a user. Note: To create additional roles, repeat steps 2 - 7.

Step 8

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

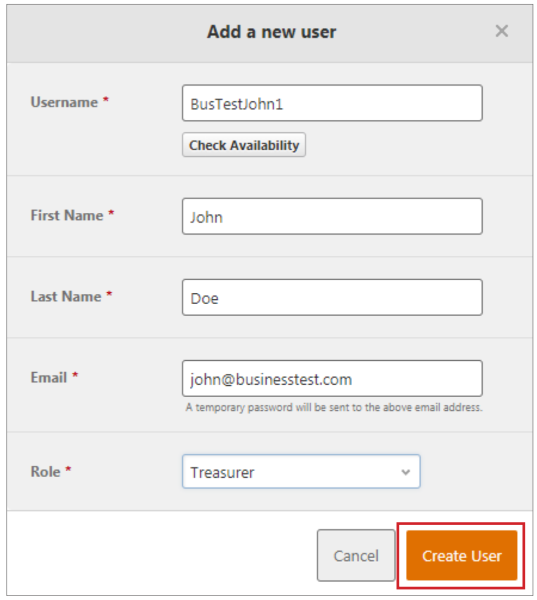


Additional User Setup

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**.



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.