

Creating a New Business Online Banking User

Only Company Administrators and/or Users who have been granted Administrator permissions will have the ability to create a new User profile in Business Online Banking. Instructions for how to create a new User in Business Online Banking are outlined below.

Step 1:

From the **Dashboard** homepage, click the **Administration** tab and select **User Admin** from the dropdown menu.



Step 2:



For security purposes, you will have to enter a One-Time passcode before you're able to proceed with creating the new User. From the screen below, select the method in which you want to receive your One-Time passcode by clicking the Send to link under either Text Message or Voice Call. Please make sure your phone is on and accessible before you click the link.



One Time Passcode

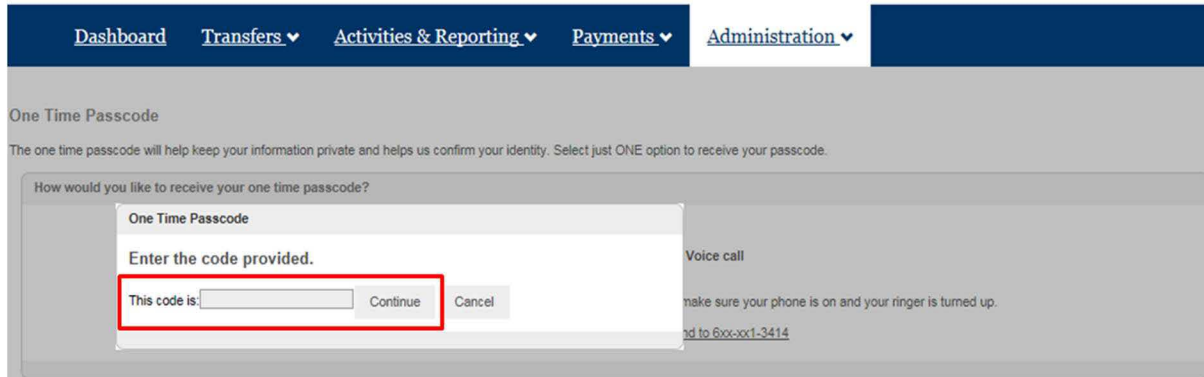
The one time passcode will help keep your information private and helps us confirm your identity. Select just ONE option to receive your passcode.

How would you like to receive your one time passcode?

 Text message Please make sure your phone is on. Message and data rates may apply. Send to 6xx-xx1-3414	or	 Voice call Please make sure your phone is on and your ringer is turned up. Send to 6xx-xx1-3414
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Step 3:

Your One-Time passcode will be sent to you via the method you selected. Enter the code provided into the This code is field and click Continue to proceed.



Step 4:

From the **User Admin** page, click the **Add User** link located on the top right side of the page to get started.



Step 5:

On the **Add New User** page, the Company Administrator will need to:

1. Complete all of the required **User Login Information** fields that are highlighted in red
2. Check off the **Generate Password** box
3. Select all of the appropriate User permissions under the **Service Info** section. Administrators will have the ability to copy permissions from another User by clicking the **Copy permissions from an existing user** drop down box and selecting the User from whom they want to copy permissions.
4. Once all of the User information has been added, scroll to the bottom of the page and click the **Submit** button. A system generated email will be sent to the new User with their password information at this time. The Administrator who set up the new user will need to provide the user with their User name.

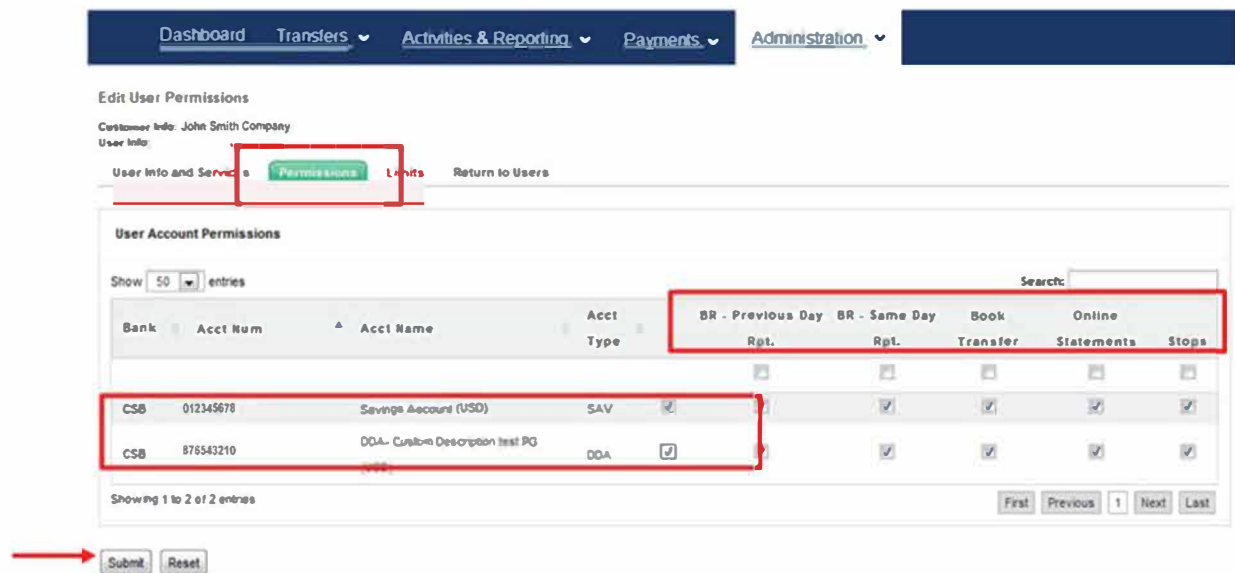
Establishing User Permissions & Limits for non Wire/ACH Users:

The Administrator must set up User Permissions and User Limits for the new user profile by completing the required information on the **Permissions** and **Limits** tabs located at the top of the page.

Permissions Tab

The Administrator must check off which accounts the User has permission to access, as well as the capability within each account. Click the **Submit** button once complete.

Important: If the User’s profile was copied, there may already be checkmarks in some of the capabilities boxes. Please pay special attention to copied profiles to ensure that the appropriate permissions have been set. If copying an Admin profile, be sure to review the “User Type” and select either Admin or User, as appropriate. Please be aware that if you establish Admin profiles, these individuals will be authorized to establish or change other Users.



Limits Tab: Review and set limits for any permitted service where limits are appropriate.

The final step is for the Administrator to set the User’s **Book Transfer Limits** for the accounts permissioned above. Once the limits have been entered for each account, click the **Submit** button to complete the process. The administrator has successfully set up the user after this point.

Note: If the User’s profile was copied, there may already be limits in some of the capabilities boxes. Please pay special attention to copied profiles to ensure that the appropriate permissions have been set.

