Managing Bill Pay Users in Business Online Banking

Only Company Administrators have permission to add and edit Bill Pay Users in Business Online Banking. Cambridge Savings Bank first establishes the Company Administrator’s Bill Pay profile, and then the Administrator is responsible for adding additional Bill Pay Users.

Instructions for how to add and edit Bill Pay Users in Business Online Banking are outlined below.

The Company Administrator must first permission the User to access Bill Pay within Business Online Banking.

1. From the Navigation menu, select User Management. In the User List view, locate the User that you want to grant permission to and use the Action button to select modify.

2. From the Modify User screen, click next to access the Assign Services screen.

3. Under the Assign Services list, click on the + to expand the options under Others.

4. Under Outbound SSO, check off Bill Pay.

5. Click next to advance to the limits screen.

6. Click next again to advance to review the user information screen.
7. At the bottom of the **review user information screen** click save.

![](image)

**Important Note:**
Both the Company ID and User ID are needed when establishing the Bill Pay User on the Bill Pay System. The IDs are case sensitive and must match exactly what is established in the Business Online Banking system. The Company Administrator can capture the User’s ID from the Edit User Information Screen.

8. Once the Bill Pay service is added to the User’s permissions, go to the **Navigation** menu, select **Other Services**, and select **Bill Pay**.

![](image)
9. From the Bill Pay screen, click the Login to Bill Pay button. A pop up will display warning you that you are leaving this site and being directed to a 3rd party site. Click Continue.

![Bill Pay screenshot]

Caution: You are about to leave this site.
By clicking 'Continue' below, you will be directed to our 3rd party vendor site.

CONTINUE  Cancel

10. From the Bill Pay homepage, click on Administration, and then select the Business Users option. From the Business Users page, click add a user to add a new Bill Pay User.

![Business Users screenshot]

Business Users

Here's a list of your current business users. You can edit a user at any time.

Name | User ID | User Type
Sarah A Sullivan | suillivan | Administrator

11. On the Add a User page, complete the User Information, Login Information, and Privileges (including account numbers, approval limits, authorizations, and reports) sections.

![Add a User screenshot]
12. Once all fields are complete, click the **Add user** button at the bottom of the page to continue.
13. Once the Company Administrator clicks **Add user**, an **Add User Confirmation** message will appear at the top of the screen confirming that the User was successfully added.

Please review the User’s Bill Pay confirmation details and ensure all the information is accurate. If edits need to be made, the Company Administrator can click **Edit this user** at the bottom of the page.