


## Incoming Wire Detail Report – Permissions Guide

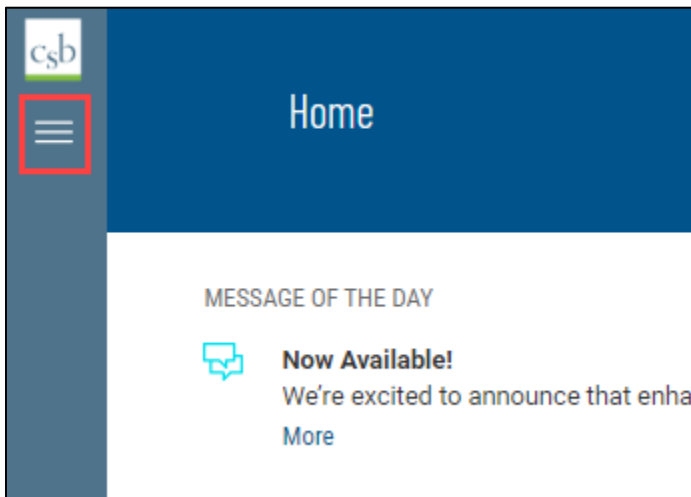
This guide shows the steps needed to grant permissions for the **Incoming Wire Detail Report**.

1. Log in to Business Online Banking by navigating to URL:  
<https://businessonlinebanking.cambridgesavings.com/dbiwp>.
2. Enter your Customer ID, User ID, and password. Click **“Sign In”**.

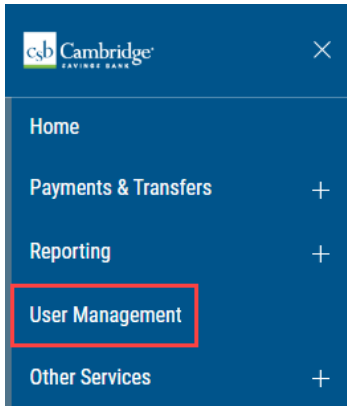


The login form displays the CSB Cambridge SAVINGS BANK logo at the top. Below the logo are three input fields labeled "CUSTOMER ID", "USER ID", and "PASSWORD". At the bottom left is a blue "SIGN IN" button, and at the bottom right is a link that says "Forgot Password?".

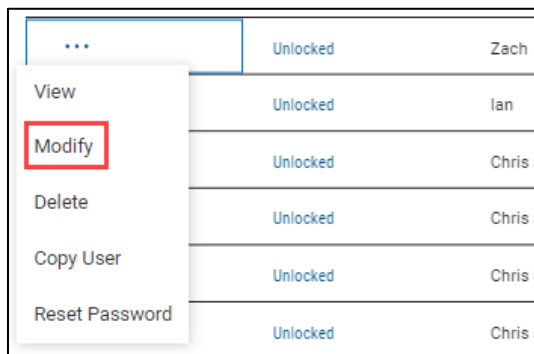
3. Navigate to the slide out menu on the left side of the screen.



- Click **"User Management"**.



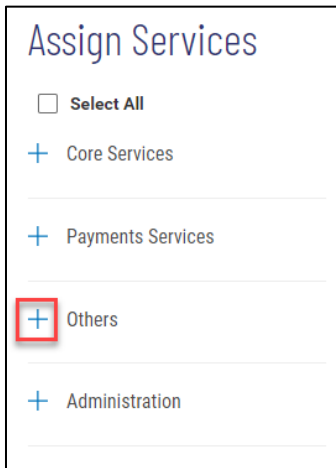
- Locate the user requiring changes, click the (...) menu and select **"Modify"**.



- Click **"Next"**.

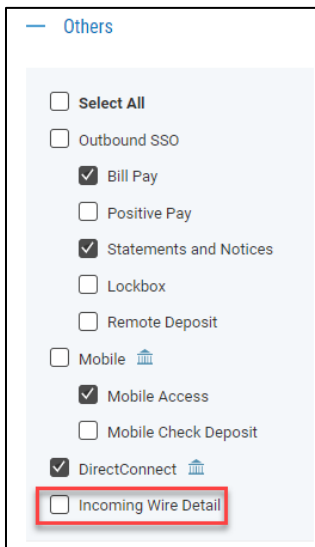
A screenshot of the 'Modify User' form. The form is titled 'Modify User' and has a blue header bar. It is divided into two main sections: 'DEFINE USER' and 'CONTACT INFORMATION'. The 'DEFINE USER' section contains fields for 'USER ID' (bttest2), 'USER NAME' (Ryan), 'CONTACT NAME' (Test Name), 'DIRECTCONNECT ID' (bwbtestcobttest2), and 'PASSWORD' (System Generated Password). The 'CONTACT INFORMATION' section contains fields for 'EMAIL' (RyanTest@gmail.com), 'PHONE' ((617) 441-4398), and 'USER SETTINGS' (ENABLE DATE: 06/06/2022, USER TYPE: Admin). At the bottom right, there is a 'Cancel' button and a 'NEXT' button. The 'NEXT' button is highlighted with a red rectangular border.

7. Expand the **Others** menu.



The screenshot shows a web interface titled "Assign Services". It contains a list of service categories, each with a plus icon to its left. The categories are: "Select All", "Core Services", "Payments Services", "Others", and "Administration". The "Others" category is highlighted with a red rectangular box around its plus icon.

8. Check the box for Incoming Wire Detail.



The screenshot shows the expanded "Others" menu. It contains a list of service options, each with a checkbox to its left. The options are: "Select All", "Outbound SSO", "Bill Pay", "Positive Pay", "Statements and Notices", "Lockbox", "Remote Deposit", "Mobile" (with a mobile phone icon), "Mobile Access", "Mobile Check Deposit", "DirectConnect" (with a building icon), and "Incoming Wire Detail". The "Incoming Wire Detail" option is highlighted with a red rectangular box around its checkbox.

**Note:** The Incoming Wire Report will be available to the user for each account permitted for **Bank Account Info Reporting**. You can review the users access for reporting under **Accounts** and make any changes as needed.

**Assign Services**

☐ Select All      Apply selection to ☐ All Accounts ☒ Select Accounts

**Core Services**

**Payments Services**

**Others**

- ☐ Select All
- ☐ Outbound SSO
- ☒ Bill Pay
- ☐ Positive Pay
- ☒ Statements and Notices
- ☐ Lockbox
- ☐ Remote Deposit
- ☐ Mobile
- ☒ Mobile Access
- ☐ Mobile Check Deposit
- ☒ DirectConnect
- ☒ Incoming Wire Detail

**Administration**

ACCOUNTS	PERMISSIONS NAME	TRANSFERS	TRANSFER ABILITY	BANK ACCOUNT INFO REPORTING	STOP PAYMENTS
<input type="checkbox"/> [Redacted]		<input type="checkbox"/>	Select ▾	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> [Redacted]		<input type="checkbox"/>	From/... ▾	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Analyzed Business Checking - ...		<input checked="" type="checkbox"/>	From/... ▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Cambridge 1 - ****2555		<input type="checkbox"/>	From/... ▾	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Chris - ****1623		<input type="checkbox"/>	From/... ▾	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> [Redacted]		<input type="checkbox"/>	From/... ▾	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Small Business Checking - ***...		<input type="checkbox"/>	From/... ▾	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> [Redacted]		<input type="checkbox"/>	From/... ▾	<input type="checkbox"/>	<input type="checkbox"/>

9. Click **“Continue to Summary”** in the bottom right corner of the screen.

DISPLAY 10 ▾      1 2 >

Cancel    BACK    NEXT

[Continue to Summary](#)

10. Review the user permissions, if correct then click **“Save”** at the bottom of the screen.