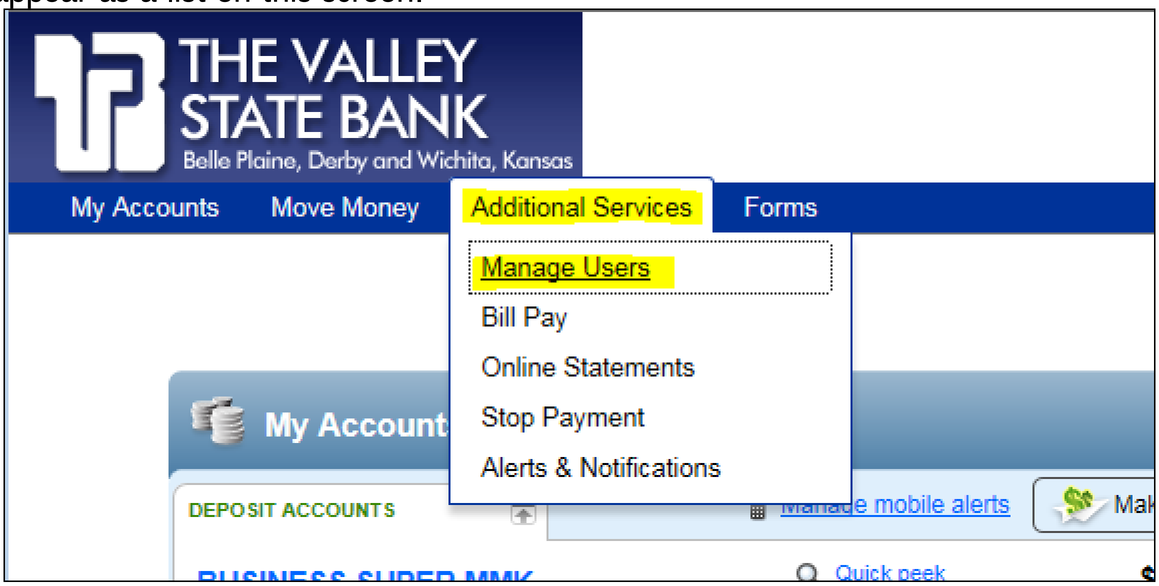
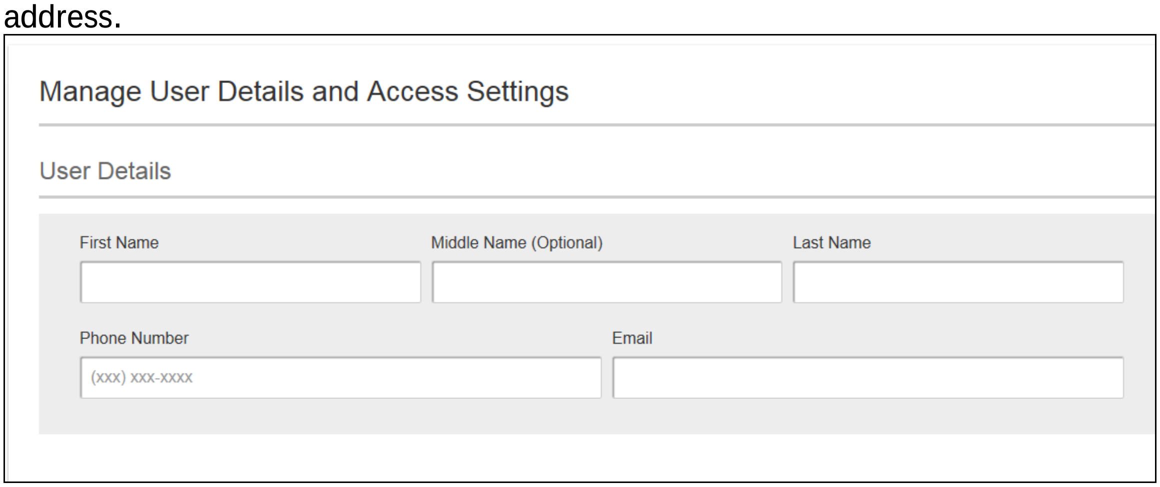
Business Online Banking
How To: Add a new user

1. Log in to Business Online Banking as Admin User.
2. Hover over "Additional Services" on the top navigation then click on "Manage Users". If this is the first time adding a user, it will just display the Add a User button. If you already have users set up then they will appear as a list on this screen.

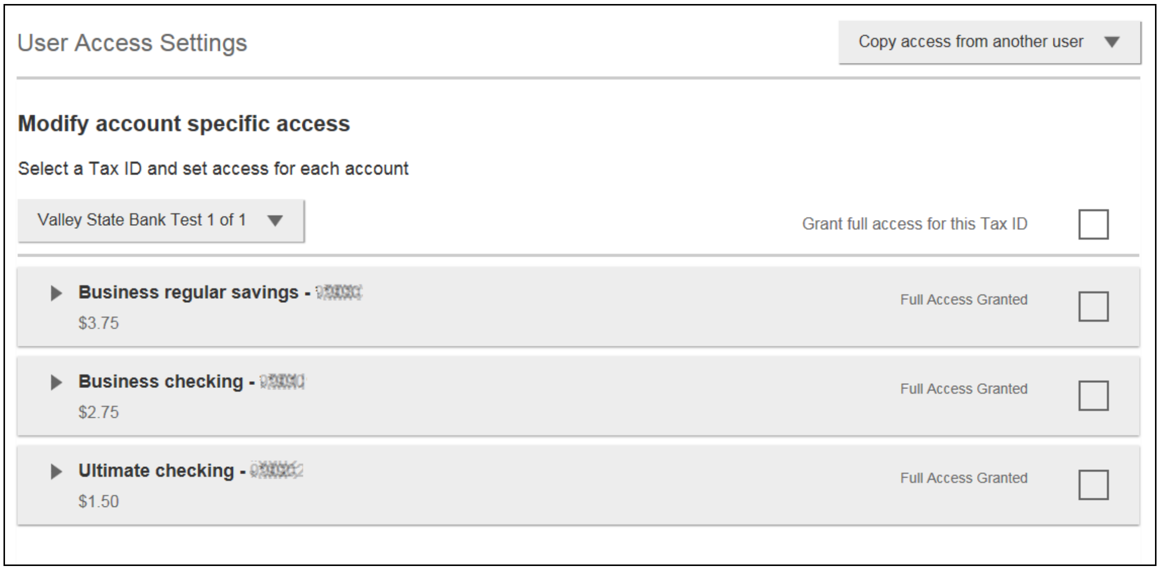


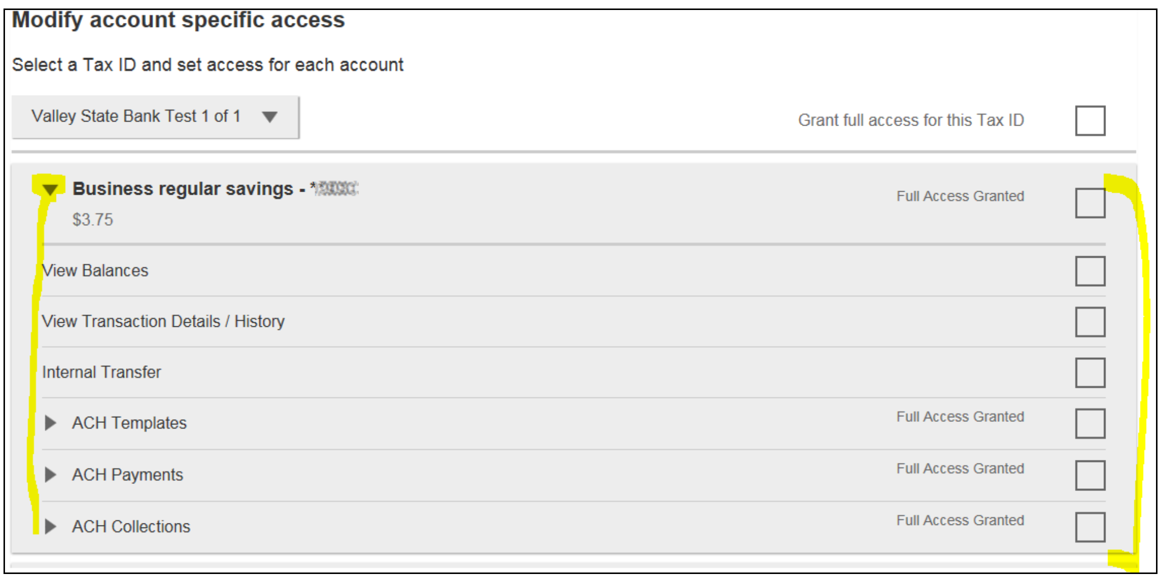
3. On this screen start by entering the basic information about the user you want to add. Their name, phone number (Cell Preferred), and e-mail address.



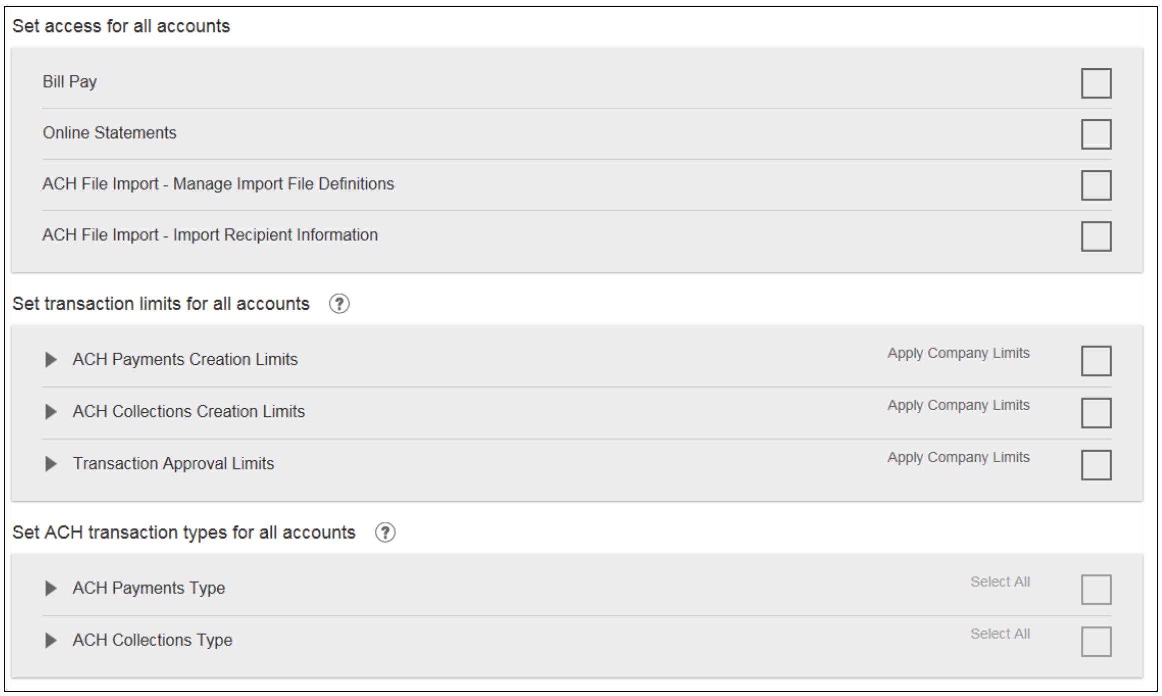
4. The next section is the User Access Settings. This is where you grant the user access to accounts or services you are setting them up for. You can

select to grant full access for the accounts or select specific access rights per account.





5. The next section is to grant specific services and set ACH limits. You can apply company level limits for ACH or if you want to get granular you can set specific creation and/or approval limits for per transaction, per day or per month on a per user basis. *(Tip: ACH "Payments" is for something like payroll where you PAY your employee's. ACH "Collections" is for collecting payments from customers if you were a Gym and collecting monthly gym membership dues from customers for example.)*



6. When you are satisfied with your account access you have granted to the user. Click “Save” at the bottom of the page. If there are any errors or omissions you will be prompted to fix those before continuing. The user you set up will be e-mailed a random generated USER ID and random generated Temporary Password. You can distribute the First Time Login tutorial to them for assistance in logging in for the first time.