

SECTION 1 OF 5 · GETTING STARTED

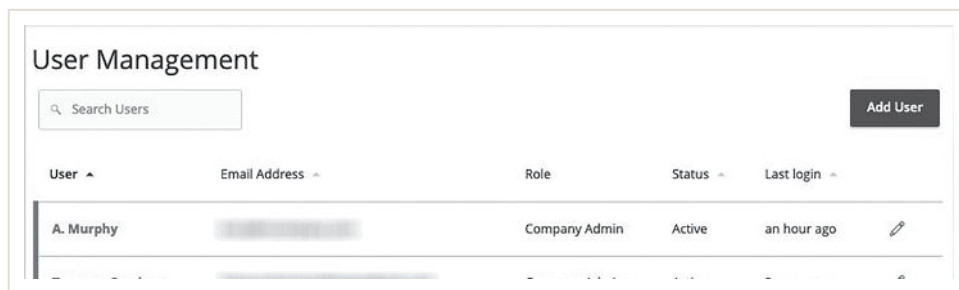
Adding a New User

Each employee needs their own login ID and password to access your business's online banking. Setting up individual logins lets you manage access and rights at the level that fits each person's role.

Before You Begin: What a User Role Controls

Every user is assigned a role that permits or restricts what they can do inside Business Online Banking, including:

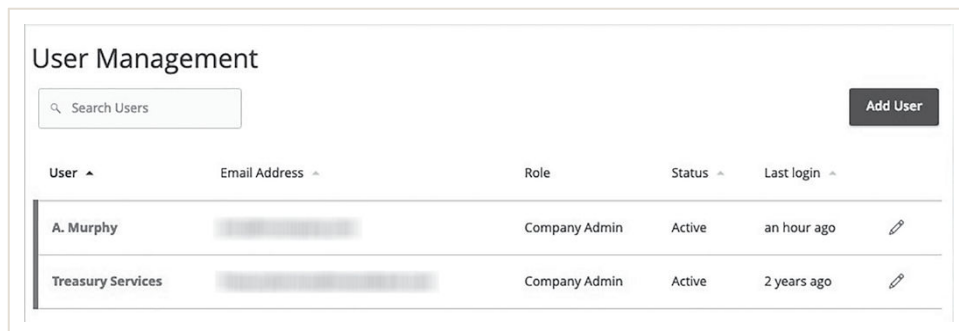
- Sending or drafting payments, and creating templates for certain transaction types
- The number of approvals allowed per day, or the dollar amount on a specific transaction
- Which accounts the user can access
- Whether the user can manage recipients, other users, subsidiaries, or templates



The User Management page: view every user, their role, and status in one place.

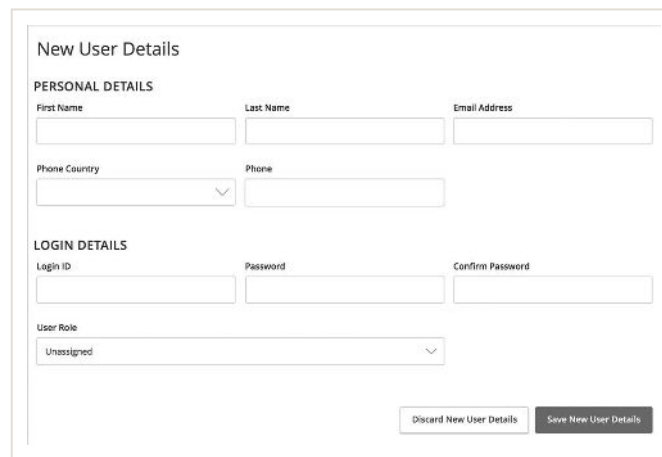
Steps: Adding a New User

In the Business Banking tab, click **User Management**.



Click Add User in the top right corner.

- 1 Click the **Add User** button in the top right corner.
- 2 Enter the user's first name, last name, and email address.
- 3 Select the user's country from the **Phone Country** drop-down and enter their phone number.
- 4 Create a unique login ID for the new user.
- 5 Enter a password that follows your institution's guidelines, and confirm it in the field provided.
- 6 Select the appropriate user role from the drop-down.
- 7 Click **Save New User Details** when finished.



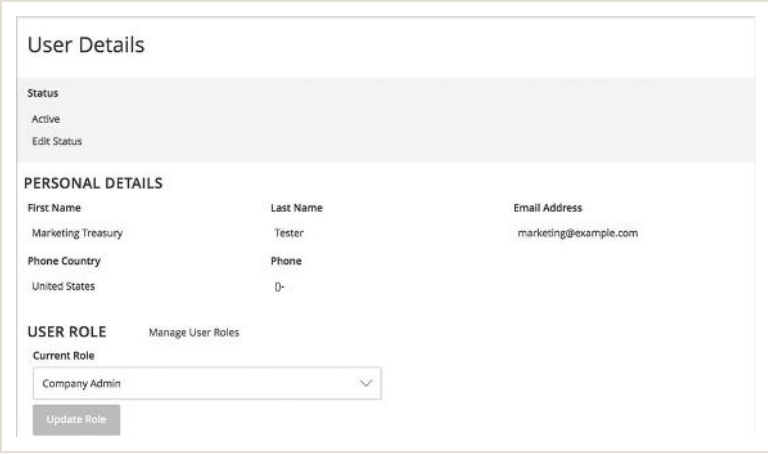
The New User Details form: personal details, login details, and user role.

Full guide reference: pp. 24-26.

Editing a User

Authorized users with the Manage Users right can update an existing user at any time, which is useful when a job changes and approval limits or responsibilities need to shift with it.

- 1 In the Business Banking tab, click **User Management**, find the user, and click the edit icon.
- 2 Activate or deactivate the user by clicking the **Edit Status** link.
- 3 Select a different role from the **Current Role** drop-down, then click **Update Role** when finished.

The screenshot shows the 'User Details' page. At the top, there's a 'Status' section with 'Active' and an 'Edit Status' link. Below that is the 'PERSONAL DETAILS' section with fields for 'First Name' (Marketing Treasury), 'Last Name' (Tester), 'Email Address' (marketing@example.com), 'Phone Country' (United States), and 'Phone' (0-). The 'USER ROLE' section shows 'Current Role' as 'Company Admin' with a dropdown arrow and an 'Update Role' button. A 'Manage User Roles' link is also present.

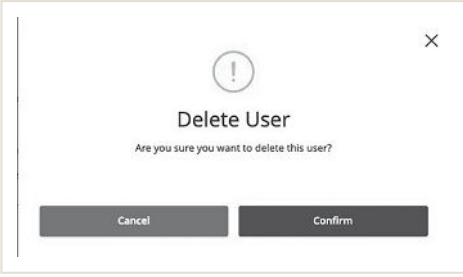
The User Details page: update status, personal details, or user role.

Full guide reference: p. 27.

Deleting a User

Users with the Manage Users right can permanently delete a user who is no longer needed. This removes their contact information from User Management and deactivates their login, but it does not erase data tied to payments they already processed.

- 1 Find the user you want to remove and click the delete icon.
- 2 Click the **Delete** button.
- 3 Click **Confirm** to permanently remove the user.

The screenshot shows a 'Delete User' confirmation dialog box. It has a title bar with a close button (X). Inside, there's a warning icon (exclamation mark in a circle) and the text 'Delete User'. Below that, it asks 'Are you sure you want to delete this user?'. At the bottom, there are two buttons: 'Cancel' and 'Confirm'.

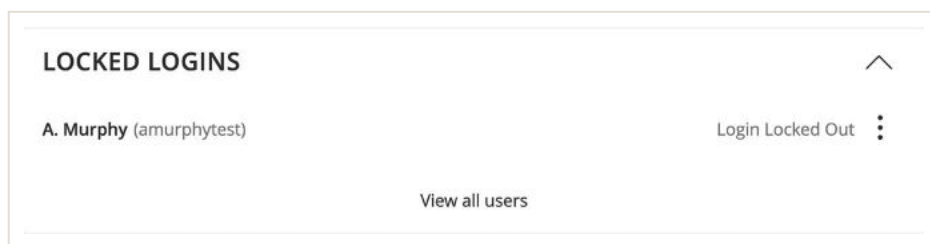
Confirm permanently removing the user.

Full guide reference: p. 28.

Unlocking a Login

A login can become locked after too many failed attempts. Locked logins appear at the bottom of the Home page, where they are easy to find and unlock.

- 1 Click the **Home** tab.
- 2 Click the icon next to the locked login and select **Unlock login**.



Locked logins appear at the bottom of the Home page.

Full guide reference: p. 29.