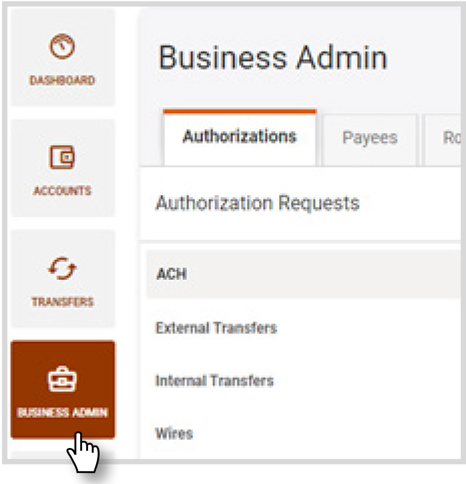
User Management

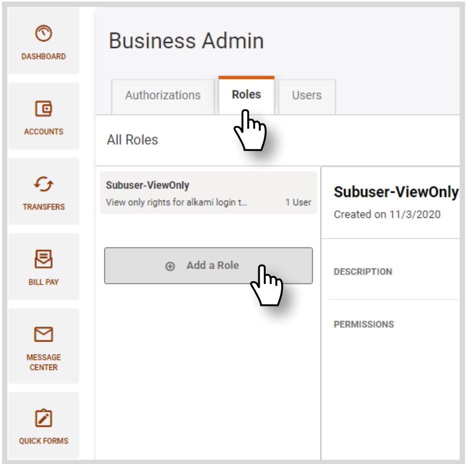
If you are the Master User for your business within online banking, you have rights to create and manage additional users, or sub-users. This is extremely helpful if you have other individuals within your organization that help you manage the company finances, such as an accountant or payroll clerk.

Creating a User Role

STEP 01/07

From the side bar menu, click or tap **Business Admin**.



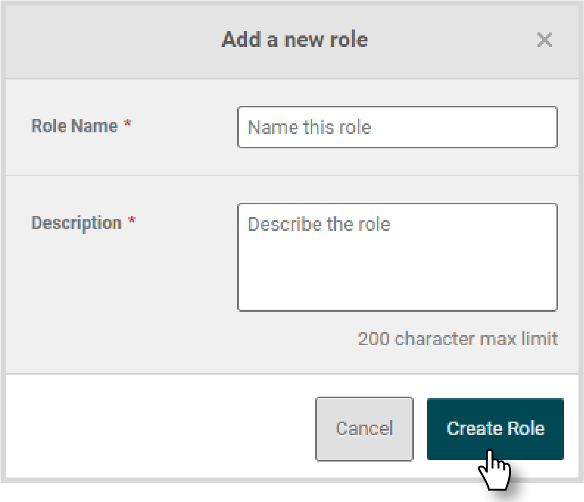


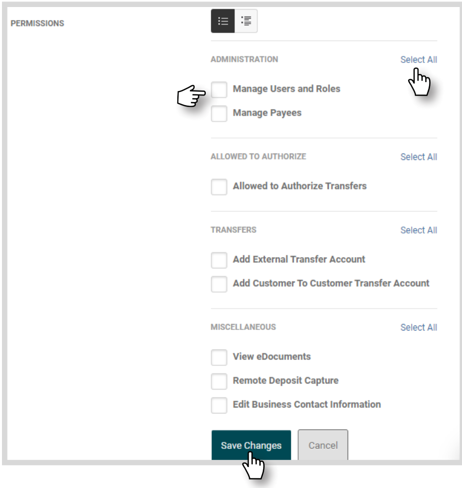
STEP 02/07

Click or tap the **Roles** tab. Then choose **Add a Role**.

STEP 03/07

Enter a Role Name and a brief Description. Then click or tap **Create Role**.



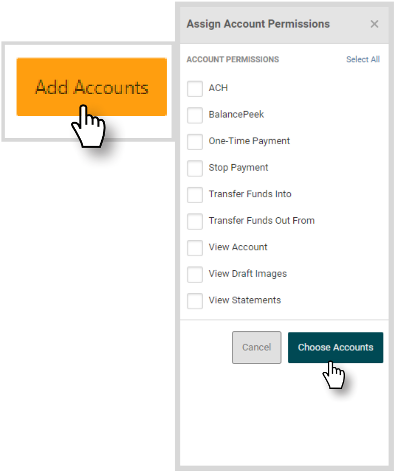


STEP 04/07

Add the Permissions that will be assigned to all users assigned to this Role.

You can choose **Select All** to select all Permissions within a certain category, or select Permissions individually.

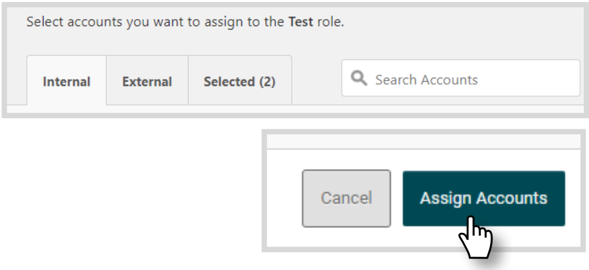
Click or tap **Save Changes**.



STEP 05/07

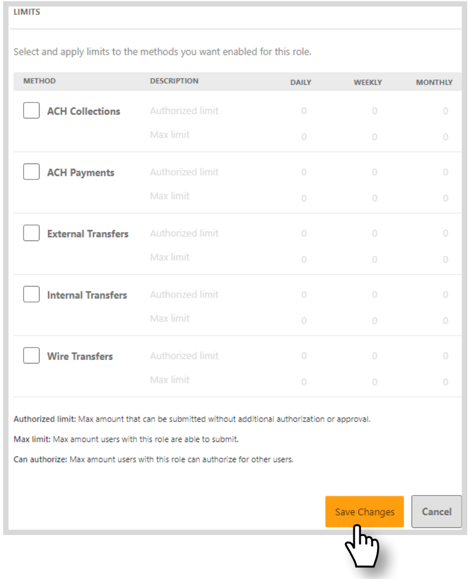
Click or tap the **Add Accounts** button. Select the desired Permissions and click or tab on **Choose Accounts**.

To add account-specific permissions, complete these steps separately for each account.



STEP 06/07

Select the Internal and External Accounts to provide access to Users assigned this Role then click or tap the **Assign Accounts** button.



STEP 07/07

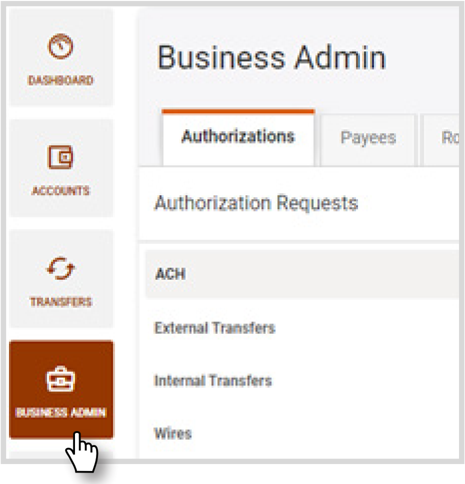
Scroll to the limits section and select **Edit Limits** and select the payment/transfer methods enabled for this Role. Then, enter limits to these methods and select **Save Changes** to save the permissions.

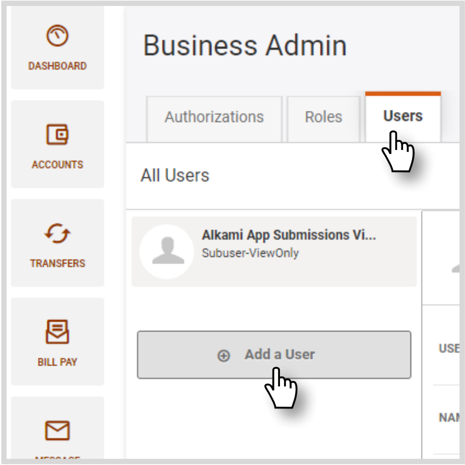
Follow these steps to Manage exisiting Roles as well.

Creating a New User

STEP 01/03

From the side bar menu, click or tap **Business Admin**.





STEP 02/03

Click or tap the **Users** tab. Then select **Add a User**.

STEP 03/03

Fill in the sub-users information on the Add a new user page. Assign the sub-user a Role. Then, click or tap **Create User**.

Visit the Users tab in the Business Admin widget to edit or remove sub-users as well.