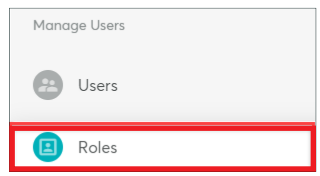
Business banking: roles and sub-users

Follow these instructions to create new roles and sub-users in your business Online Banking. Each role that is created has customizable permissions for your business needs.

How to create a new role with permissions

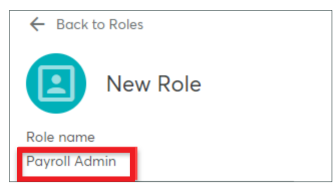
1. Log in to Online Banking and click **Manage Users.**

2. Under "Manage Users", click **Roles.**



3. Click on **Add New Role.**

4. Enter **Role Name** (e.g., Payroll Admin, Office Manager, Accountant, etc.).



5. Assign access for the role by marking the checkboxes next to the permissions you would like the role to have. These include:

- Account access
- View Statements and Documents
- External Accounts
- Transfers
- Business ACH
- Recipients
- ACH Transaction Types
- ACH Limits

6. Click **Create Role.**

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Business banking: roles and sub-users (cont.)

How to set up a sub-user

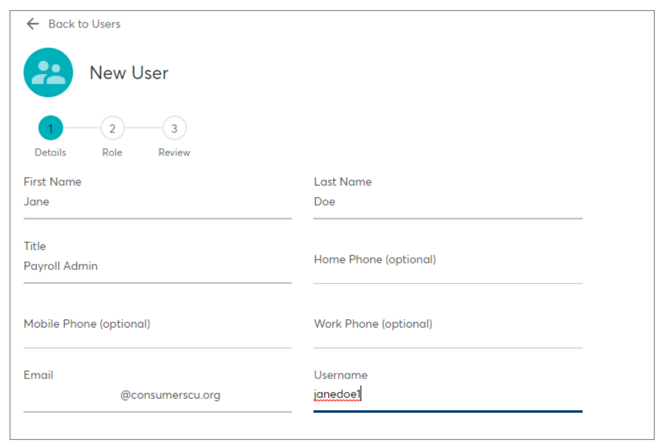
1. Log in to Online Banking and click **Manage Users.**

2. Click **Add a New User.**

3. In the "New User" window:

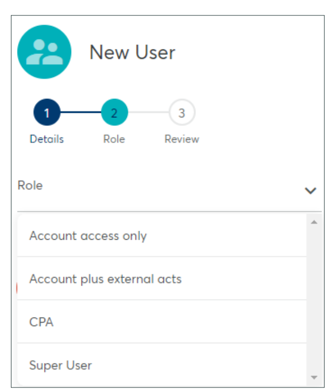
- Enter user's **First Name**
- Enter user's **Last Name**
- Enter user's **Title**
- Enter user's **Phone Numbers** (optional)
- Enter user's **Email Address**
- Create a **Username**

Note: Usernames will need to be verbally shared with the new sub-user for security reasons.



4. Click **Next.**

5. Select the previously created role from the "Role" dropdown menu, and click **Next.**



Business banking: roles and sub-users (cont.)

6. Click **Confirm.**
Note: A temporary password will be sent to the sub-user's email address and will expire within 24 hours. The temporary password will need to be entered in the "Old Password" field when the sub-user is creating their new password.