

CREATE ADDITIONAL USERS IN BUSINESS ONLINE

1. Click on Administration from the top menu bar.



2. Click the Employee profile & permissions box, then choose the New Employee radio button, click Submit.

Administration

ACH template Employee profile & permissions Employee accounts

Employee Profile & Permissions

Select User Criteria

Inquire Employee
Go To...

Change Employee
 New Employee
 New Employee Using Existing Employee
 Delete Employee

Name:
Username:

3. Complete the next screen, fields with asterisks are required. From this page you can grant as much or as little access to the user. Once complete, click Next.

New Employee 1 - Codes

Codes

* Indicates Required Field

* Name:

Tax ID Code: Not Present

Tax ID Number:

Security Level: Employee

Mother's Maiden Name:

Employee Group: None

Transaction Exports: No

(None)
(None)
(None)
(None)
(None)
(None)

Contact Methods

E-mail Address:

Business Phone:

Business Phone Ext.: 0

Mobile Phone:

Client Details

Client Name Client Number Client Tax ID

Security

* Username: * Change Password
PIN:

Terms Acceptance Date:

Multifactor Authentication

Token Status: (None)

Token Type: (None)

Role Assignment

* Role Name: (None)

ACH

Employee is not enabled for ACH Manager access. Check the checkbox to grant ACH Manager access.

Accounts

To grant account access for this Employee check the checkbox associated with the account. To remove account access, uncheck the checkbox.

Checking

Access	Account Number	Account Nickname
<input checked="" type="checkbox"/> Select All	████████████████	████████████████
<input type="checkbox"/>	████████████████	████████████████

Overrides

Cutoff Group Override:

Approval Options

Review Internal Transfers:

Fund Transfer Options

Inquire Transfers:

Initiate Transfers:

Merchant Capture Options

Merchant Capture Option:

Role:

View Client Deposits:

Per Item Limit:

Per Deposit Limit:

Per Day Limit:

Stop Payments

Inquiry:

New:

Interface Specifications

Interface:

User Code:

Password:

Enables employee access to customer alerts for name, address, and phone number changes for the Business.

Electronic Documents

Enable All:

Document:

Document:

Applications Enabled

Select All:

Wires:

4. Click Finish

Employee Profile & Permissions

New Employee

1 - Codes

2 - Account Update

Access Added

Checking

Business Online	Account Number	Account Nickname
<input checked="" type="checkbox"/>	████████████████	████████████████
<input checked="" type="checkbox"/>	████████████████	████████████████
<input checked="" type="checkbox"/>	████████████████	████████████████

5. Once you click Finish, you will see confirmation that the new user was created successfully.

Administration

ACH template

Employee profile & permissions

Employee accounts

Employee Profile & Permissions

Success

Employee Created Successfully

6. Use the Employee Accounts button to change permissions or access on an account level per user. Leave the Access ID and Employee Name fields blank and hit Submit, this will show the list of all users. Click the hyperlink of the employee name you wish to update.

Administration

ACH template

Employee profile & permissions

Employee accounts

Follow the instructions below to Remove an existing user.

1. Click the Employee profile & permissions box, then choose the Delete Employee radio button, leave the Name and Username fields empty, click Submit

Employee Profile & Permissions

Select User Criteria

<input type="radio"/> Inquire Employee <input type="radio"/> Change Employee <input type="radio"/> New Employee <input checked="" type="radio"/> New Employee Using Existing Employee <input checked="" type="radio"/> Delete Employee	Name: <input type="text"/> Username: <input type="text"/>
Go To... <input type="button" value="Codes"/> <input type="button" value="Submit"/> <input type="button" value="Clear"/>	

2. Click the hyperlink of the user.
3. If the employee had ACH access you will see the screen below, click Next. If no ACH Access go to next step.

ACH User

Company			
Company Name	Company ID	Company Entry Description	
<input checked="" type="checkbox"/> [REDACTED]	[REDACTED]	[REDACTED]	

Internal Account Selection

Account Number	Account Type	Routing Number	Nickname
[REDACTED]	Demand Deposit	081906505	[REDACTED]
[REDACTED]	Demand Deposit	081906505	[REDACTED]

4. Click the Delete Icon or Finish button, you will see confirmation that the user was deleted successfully.

Employee Profile & Permissions

Delete Employee

Name:	Chad Test	Username:	chadtest
Contact Methods			
E-mail Address:			
Business Phone:			
Business Phone Ext.:	0		
Mobile Phone:			

Employee Profile & Permissions

Success
Employee Deleted Successfully