HOW TO ADD A NEW USER

The following steps show how an Admin User can add a new user to a company's Business eBanking profile. Should you have any questions, please do not hesitate to contact the Business Services Group for additional assistance.

1. Hover over the **Administration** tab, then click **Company Administration**

2. This will bring you to **Manage Users**

3. Click **Create New User**

4. Complete the following User Information and User Telephone Number fields and then click **Continue**:
   - User ID- A unique user ID that is at least four alphanumeric characters but no more than 26. Spaces and special characters are not supported.
   - Password- A temporary password the user only uses once at their first sign-on. The password must be at least eight characters but no more than 12 and include two of the following character types: letters (a-z or A-Z), numbers (0-9), or special characters (# $ @).
   - Confirm Password- Enter the password typed into the Password field
   - First Name- The user's first name
   - Last Name- The user's last name
   - Primary E-mail Address- The user's main e-mail address
   - Secondary E-mail Address-The user's back-up e-mail address
   - Additional Information-Optional description of user
   - Label- Work, Work 1, Mobile, Mobile 1, Home, or Other. Each label can be used once, for a maximum of six phone numbers
   - Country/Region- use the numeric country code associated with the telephone number and select from a listing of country names
   - Area/City code and Local Number- The telephone number separated by the one of the following characters: left and right parentheses, hyphen, period, or spaces
   - Extension- Required when an extension is needed to reach the user within an office phone system

5. Select one or more of the User Role options and click **Continue**

6. Enable services and assign accounts to the user and click **Continue**

7. If applicable, change the ACH, wire, and/or bill payment limits

   - For ACH limits, change the following and then click **Continue**:
     - User Daily Limit- the maximum allowable amount for all transactions in a given day for a group of ACH services
     - User Daily Service Limit- the maximum allowable amount for all successful transactions in a given day for a particular ACH service
     - User Daily Account Limit- The maximum allowable amount of all successful ACH transactions on a per account basis in a given day

   - For Wire limits, change the following and click **Continue**:
     - User Daily Limit- the maximum allowable amount of all successful transactions in a given day for a group of wire services

- o User Daily Service Limit- the maximum allowable amount of all successful transactions in a given day for a particular wire service
- o User Daily Account Limit- the maximum allowable amount of all successful transactions on a per account basis in a given day
- o User Individual Transaction Limit- the maximum allowable amount for each transaction for a particular account.

- For Bill Payment limits, change the following and click **Continue**:
  - o User Transaction Limit- the maximum allowable amount a company user can enter for a bill payment transaction
  - o User Transaction Approval Limit- the maximum allowable amount a company user can approve for a bill payment transaction entered by another user

8. If the enabled services do not require limits, click **Continue**

9. Verify the user's profile as needed and click **Create User**

Additional things to note:

For companies that do not require multiple approvals for Administration, clicking Submit creates and activates the user. For companies that require multiple approvals for Administration, clicking Submit requires the user profile be approved by other Administrator in the company.

User profiles are automatically saved after each step in the setup process is completed. Administrators can use the save as draft link to save user profiles at any point in the setup process and complete the setup later if necessary. Saved user profiles remain saved until the setup is complete, or they are deleted.

If Secure Token is enabled, a token device must be requested for the user by contacting the Business Services Group once the setup is completed and saved. The user will not be able to sign on until they receive their token device and enable it with a Business Services Representative.