

# Adding & Editing Users

## Adding a New User (Sub-User)

1. From the Main Menu, select **Service Center**.
2. From the dropdown menu, select **Users**.  
The screen will refresh and display all existing users for the business.
3. At the bottom of the Users box, select **Add User**.  
The User Details screen will then display.

Test 1	Business User (Manager)	test1	Active			Administrator
Test 2	Business User (Manager)	test2	Active			Administrator
Test Mobile Deposit	Business User (Manager)	testmobiledeposit	Active	06/19/2020 1:59:50 PM		Administrator

[Add User](#)

4. Enter all required information about the sub-user.  
**NOTE:**

- Required fields will be noted by an asterisk (\*)
- This user information may be used to identify a sub-user if they need to contact the bank for business online assistance.
- The password will be temporary, and the user will be prompted to change the password upon their first login.

**▼ User Details**

<p><b>* User ID</b> <input type="text"/></p> <p><b>* Temporary Password</b> <input type="password"/></p> <p><b>* Confirm Password</b> <input type="password"/></p> <p>Status  <input checked="" type="radio"/> Active                       <input type="radio"/> Disabled                       <input type="radio"/> Locked</p> <p><b>Personal Information</b></p> <p>Title <input type="text"/></p> <p><b>* First Name</b> <input type="text"/></p> <p>Middle Name <input type="text"/></p> <p><b>* Last Name</b> <input type="text"/></p> <p>Suffix <input type="text"/></p> <p>Birth Date <input type="text"/></p>	<p><b>Contact Information</b></p> <p><b>* Email Address</b> <input type="text"/></p> <p><b>* Home Phone</b> <input type="text"/></p> <p><b>Mobile Phone</b> <input type="text"/></p> <p><b>Work Phone</b> <input type="text"/></p> <p><b>Home Address</b></p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p> <p>ZIP Code <input type="text"/></p>
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5. Review all information for accuracy then click **Save** to continue.
6. You may be prompted to complete a security challenge. Please follow the prompts to complete the challenge prior to completing the secondary user's set up.

- Next select the user’s entitlements.

The Entitlements screen determines which modules the user will be allowed to access as well as set limits for usage within their business online user profile.

**NOTE:** Certain entitlements will default to ON. If you do not want the user to have the entitlement, please set uncheck the box next to the entitlement.

- After you have determined the sub-users entitlements click **Save**.

Provide the new user with their username and initial temporary password. They will then be able to login immediately using their temporary password.

Entitlement	Limit	
<b>Accounts</b>		<input checked="" type="checkbox"/>
BAI2 Export		<input checked="" type="checkbox"/>
Master Line Account Access		<input type="checkbox"/>
Merchant Capture		<input type="checkbox"/>
Positive Pay		<input type="checkbox"/>
Stop Payments		<input type="checkbox"/>
View RDC Images		<input checked="" type="checkbox"/>
View Teller Captured Images		<input checked="" type="checkbox"/>
<b>ACH »</b>		<input type="checkbox"/>
<b>ACH Whitelist »</b>		<input type="checkbox"/>
<b>Bill Pay</b>		<input type="checkbox"/>
<b>eNotices »</b>		<input type="checkbox"/>
<b>Entitlements</b>		
Manage Users		<input checked="" type="checkbox"/>
Primary User		<input type="checkbox"/>
User /Sub-user Activity Report		<input type="checkbox"/>
<b>Mobile Card Services »</b>		<input type="checkbox"/>
<b>Transfers »</b>		<input type="checkbox"/>
<b>Wires »</b>		<input type="checkbox"/>

### To Edit Additional Users’ Entitlements

Admin users or sub-users with Administrative rights can always edit an existing user’s entitlements.

- From the Main Menu, select **Service Center**.
- From the Service Center dropdown, select **Users**.
- On the Users screen, locate the **Sub-User**.
- Select the **Edit Entitlements** button (small keys icon next to the user name).



- Complete any necessary edits, then click **Save**.
- Review the Confirmation screen for accuracy, then click **Save** once completed.