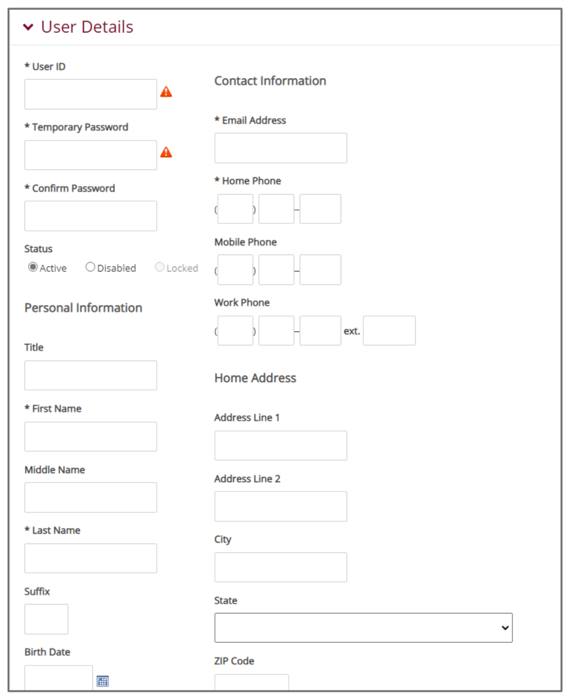
Adding & Editing Users

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.

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.



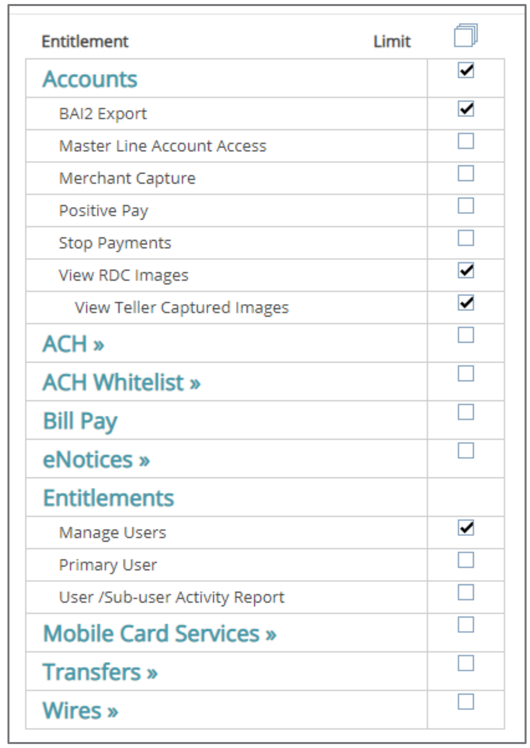
5. Review all information for accuracy then click **Save** to continue.

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.

7. 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.



8. 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.

To Edit Additional Users' Entitlements

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

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

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