

How to Create an Additional User

1. Administration > Add / Change / Remove Users

Add/Change/Remove Users

Select a user from the drop-down list or New to clear fields and add a new user.

Current User OR

User Name	<input type="text" value="Jon Doe"/>
User ID	<input type="text" value="JDOE"/>
User Password	<input type="password" value="•••••"/>
Confirm Password	<input type="password" value="•••••"/>
Email Address	<input type="text" value="jdoe@business.com"/>

Once all fields are completed, click Add.

2. Administration > Add / Change / Remove Users > Bring up user profiles

MFA One-time Passcode Delivery Options

If no MFA delivery options exist, the user's contact email address will be used.

Email Address	Phone Number	Ext.	Ext. Dial Delay	Voice Text
<input type="text" value="jdoe@business.com"/>	<input type="text" value="(401) 233-4700"/>	<input type="text"/>	<input type="text" value="N/A"/> <input type="button" value="v"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="N/A"/> <input type="button" value="v"/>	<input type="checkbox"/> <input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="N/A"/> <input type="button" value="v"/>	<input type="checkbox"/> <input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="N/A"/> <input type="button" value="v"/>	<input type="checkbox"/> <input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="N/A"/> <input type="button" value="v"/>	<input type="checkbox"/> <input type="checkbox"/>

3. Enter the users email and phone number for a one-time passcode delivery

Account Permissions for 4143DEMO													
Account Number	Account Name	Acct Rptg	Acct Transfr Cr	Acct Transfr Dr	NSF Acct Transfr	Wire Transfr	Stop Pmt	ACH	Fed Tax Pmt	Recon Excppts	Recon Issues	Account Stmt	All
01110000	1ST SAVINGS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Assign permissions

Acct Reporting allows viewing the balance & transactions.

Acct Transfer CR & DR allows crediting and debiting the account.

Stop Pmt allows the user to submit stops on checks.

Account Reporting

Allow Account Reporting

Account Transfer

Allow Account Transfer

Stop Payments

Allow Stop Payments

Stop Payments

All these boxes should be checked if the permissions were granted above.

Forms

Allow Forms

Photocopy Request

Account Research

Bill Pay Research

Check Reorder

Cash/Change Order Form

Forms allow the user to send emails to the Business Online Banking Department for research / reordering checks. Select applicable boxes.

Click Update