

## 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      Name:   
Go To... Codes ▾      Username:   
 Change Employee  
 New Employee  
 New Employee Using Existing Employee  
 Delete Employee

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

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**Codes**

\* Indicates Required Field

\* Name:

Tax ID Code:  Not Present ▾      Status:  ▾

Tax ID Number:       Date Created:

Security Level:  ▾      Date Last Accessed:

Mother's Maiden Name:       Date of Birth:

Employee Group:  ▾      Date Last Changed:

Transaction Exports:

<input type="text" value="(None)"/> ▾	<input type="text"/>
<input type="text" value="(None)"/> ▾	<input type="text"/>
<input type="text" value="(None)"/> ▾	<input type="text"/>
<input type="text" value="(None)"/> ▾	<input type="text"/>
<input type="text" value="(None)"/> ▾	<input type="text"/>
<input type="text" value="(None)"/> ▾	<input type="text"/>

▾

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**Contact Methods**

E-mail Address:

Business Phone:

Business Phone Ext.:

Mobile Phone:

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**Client Details**

<input checked="" type="checkbox"/>	Client Name	Client Number	Client Tax ID
	<input type="text"/>	<input type="text"/>	<input type="text"/>

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**Security**

\* Username:  [\\* Change Password](#)

PIN:

Terms Acceptance Date:

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**Multifactor Authentication**

Token Status:  ▾

Token Type:  ▾

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**Role Assignment**

\* Role Name

▾

[Add Role](#)

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**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 type="checkbox"/>	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	[REDACTED]

**Overrides**

Cutoff Group Override: Use Default

**Approval Options**

Review Internal Transfers: No

**Fund Transfer Options**

Inquire Transfers: No  
Initiate Transfers: No

**Merchant Capture Options**

Merchant Capture Option: Direct Merchant Access  
Role: Limited  
View Client Deposits: No

Per Item Limit: 0.00  
Per Deposit Limit: 0.00  
Per Day Limit: 0.00

**Stop Payments**

Inquiry: No  
New: No

**Interface Specifications**

Interface: Noti  
User Code: [REDACTED]  
Password: [REDACTED]

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

**Electronic Documents**

Enable All

Document
<input type="checkbox"/> DDA ON US Debits
<input type="checkbox"/> DDA ON US Credits

**Applications Enabled**

Select All

Wires

Next Cancel

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"/>	[REDACTED]	[REDACTED]
<input checked="" type="checkbox"/>	[REDACTED]	[REDACTED]
<input checked="" type="checkbox"/>	[REDACTED]	[REDACTED]

Finish

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

Inquire Employee  
 Change Employee  
 New Employee  
 New Employee Using Existing Employee  
 Delete Employee

Name:   
Username:

Go To... Codes ▾

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]

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