Online Banking Business User Guide

Create a User

Master Users (indicated with a crown on their profile) are able to create new users for the accounts (indicated with a briefcase). Users that are not Master Users, are called Sub-Users.

Please Note: You will need to log in from a desktop to add, edit, or delete users. **You will also need to create a Role before adding your first sub-users to the system, as they must be assigned an existing role.**

In the Business Admin Widget, go to the **Users Tab** and **click Add a User**. The Add a New User window will display. Enter the user's **Username**, **First Name, Last Name, and Email** in the provided fields. In the Role drop-down menu, select the **Role** you would like to assign to that user. **Click Create User**.

The new user will receive an email to the email address provided with a temporary password. They will then be prompted to change their password before logging in.

Once a User has been created, use the **pencil icon to edit the User's contact information, change roles, and reset their password**. Use the trash can icon to delete the User and remove them from the system.