

Online Banking Business User Guide

Roles

A role defines the permissions and features that are available to sub-users within that role.

Creating a role is required before you can add sub-users to the system. In the Business Admin Widget, the Roles tab will allow you to add, edit, and edit roles as needed. Once a role has been added, use the **Edit icon (pencil) to modify a role** or use the **Delete icon (trash) to remove a role.**

To add a new role – In the Business Admin Widget, go to the **Roles Tab**. Select **Add a Role**, then enter the **name and description** of the role. **Click Create Role.**