Business e-Banking User Entitlements

Admin Guide

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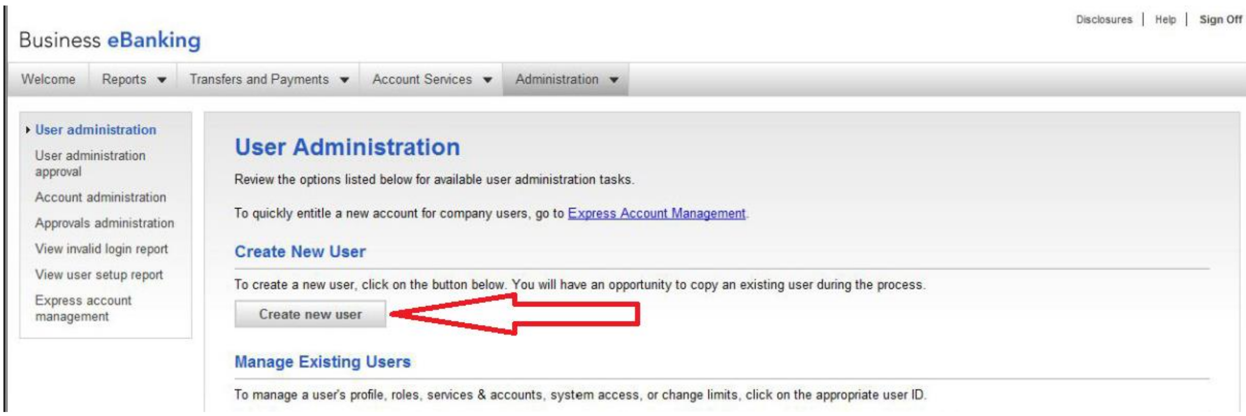
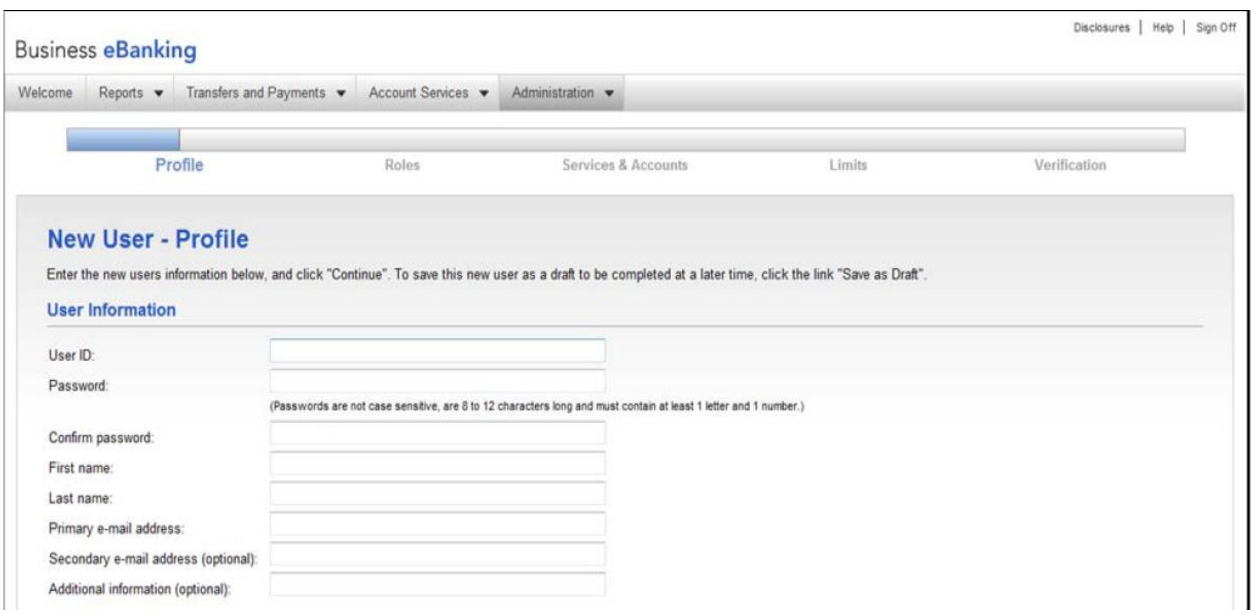
Adding Users and Services

To add new Business eBanking users and the services they will use, complete the following:

1. In the Administration tab, click Manage Users in the Company Administration section. The User Administration page will appear on screen:



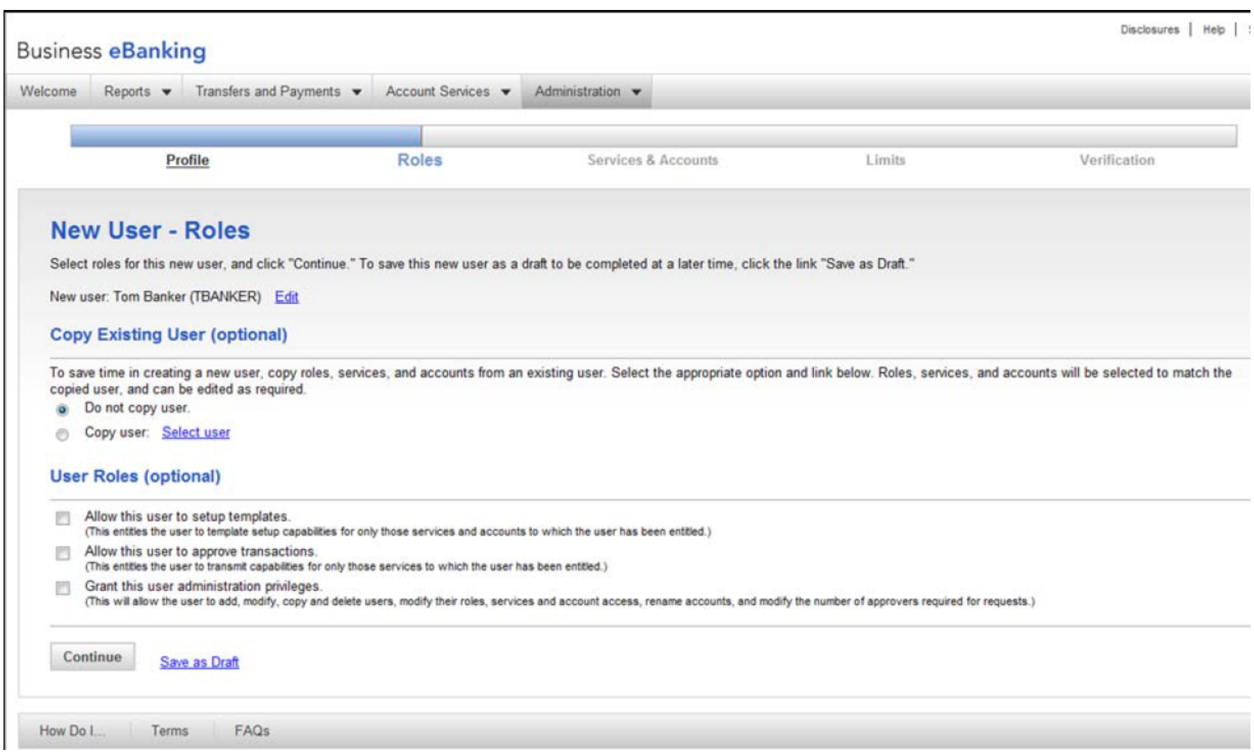
2. Click the Create new user button. The New User – Profile page will appear:



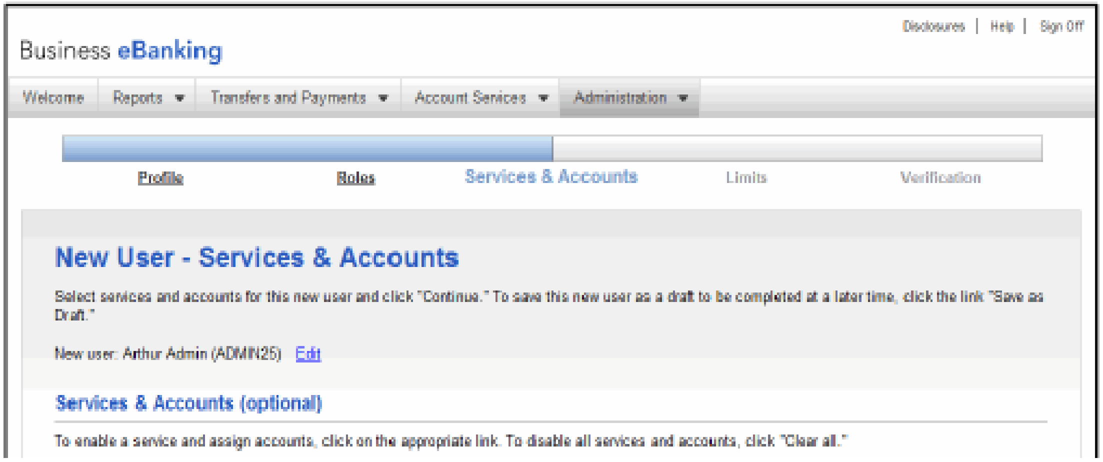
3. Complete the field as required.

Fields	Description
User ID	Enter the ID that the user will use to sign on Business eBanking
Password	Enter a starter password that follow the on screen instruction. (Passwords are not case sensitive, are 8 to 12 characters long and must contain at least 1 letter and 1 number).
Confirm Password	Enter the same starter password again.
First Name	Enter the new user's first name.
Last Name	Enter the new user's last name
Primary e-mail	Enter the email address of the new user.
User Telephone Number	Enter the **DIRECT** telephone number of the new user. If no direct telephone number available, please contact Cash Management Services.

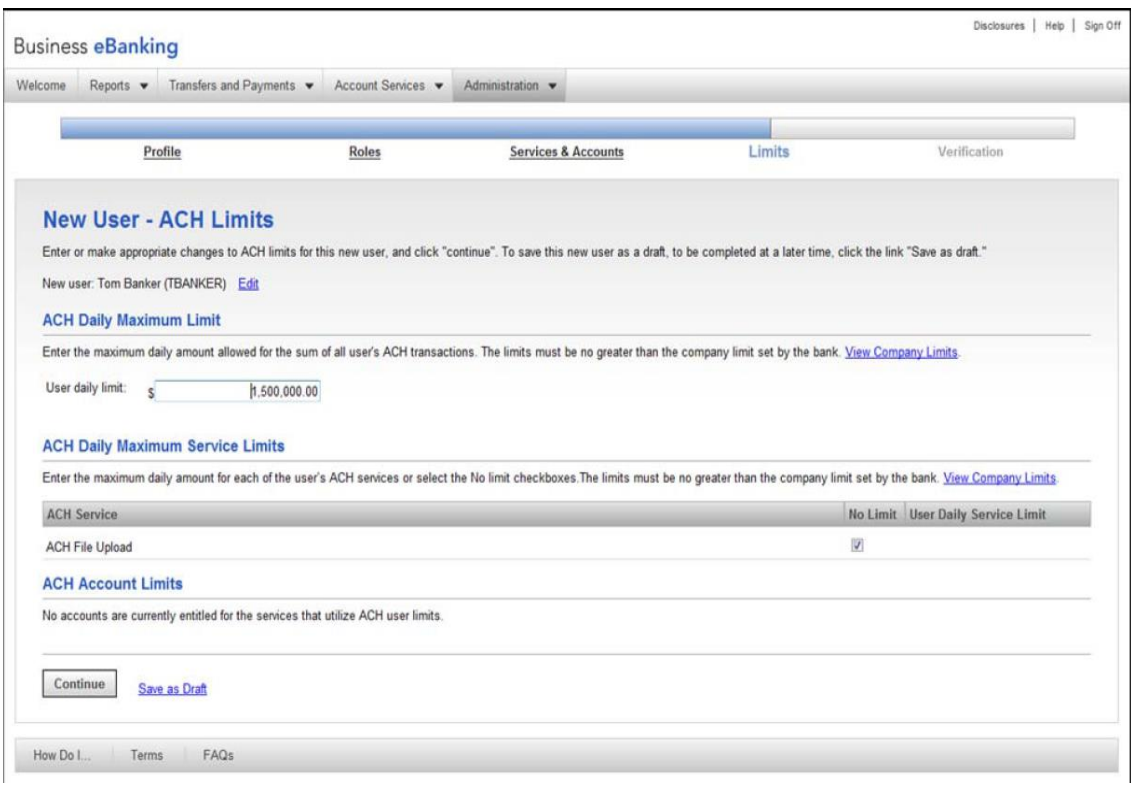
4. Click Continue. The New User – Roles page will appear on screen:



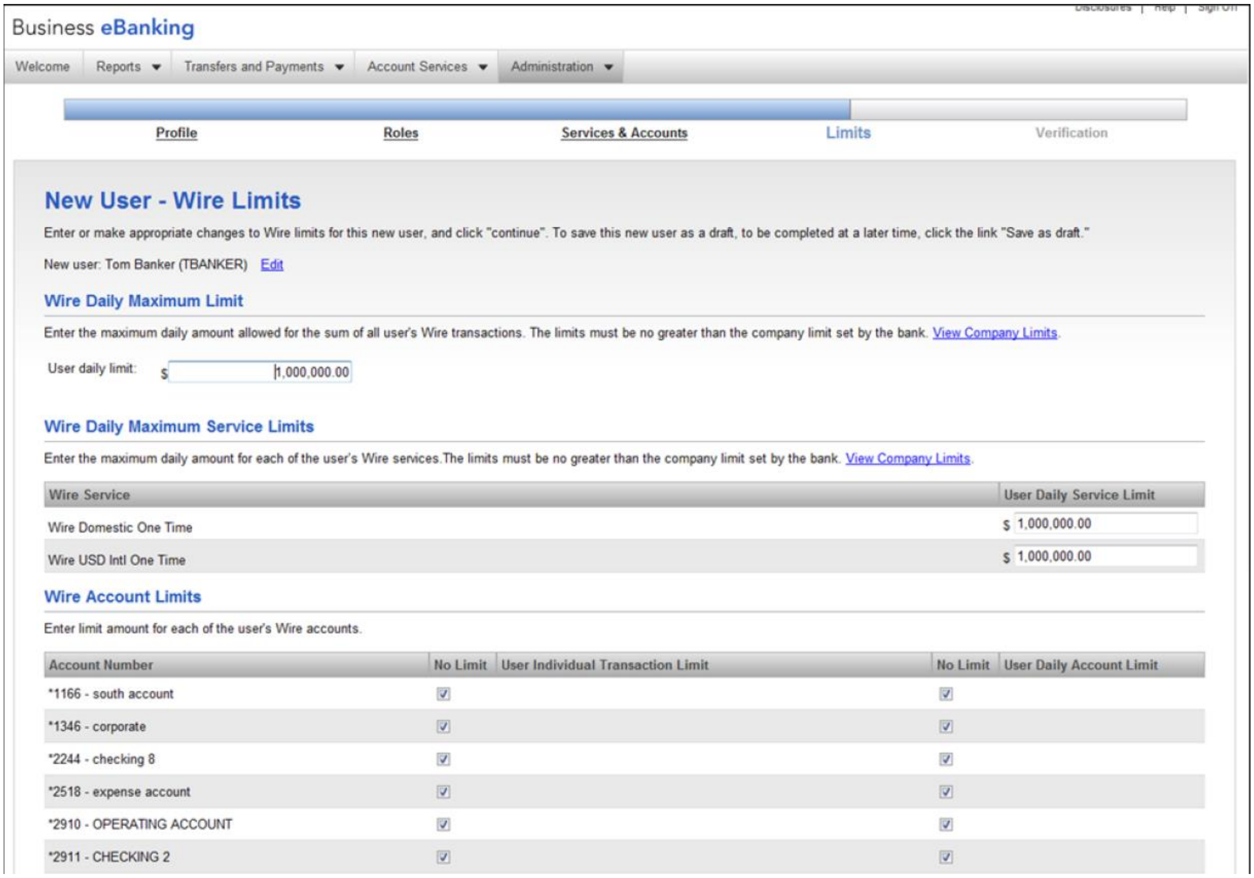
5. Optional – Check the boxes under the User Roles column that you want to assign to the new user.
6. Click Continue.
7. The New User – Services & Accounts page will appear on screen.
8. Select the services you want to enable and accounts you want to entitle to the user.



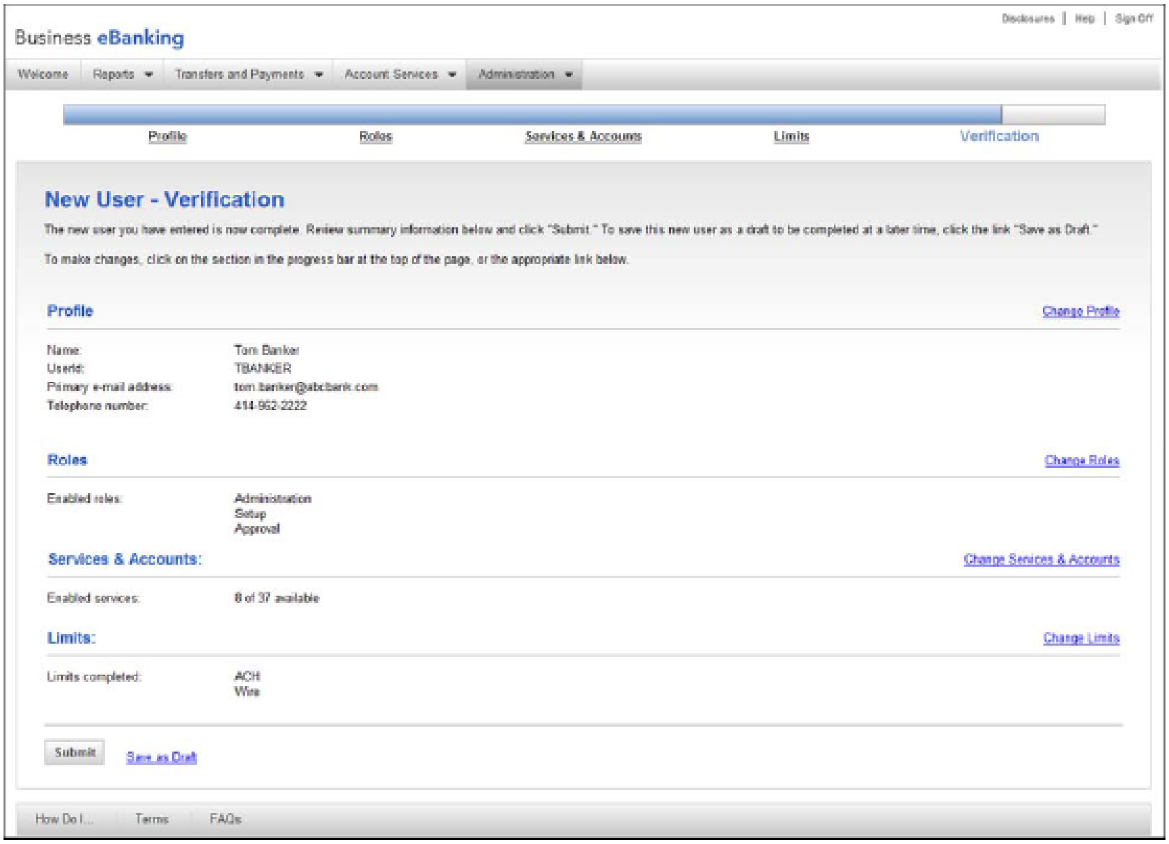
9. Click Continue.
10. The New User – ACH Limits page will appear on screen.



11. Set the ACH Daily Maximum Limit, ACH Daily Maximum Service Limits, and ACH Accounts Limits.
12. Click Continue.
13. The New User – Wire Limits page will appear:
14. Set the Wire Daily Maximum Limit (top left empty box), Wire Daily Maximum Service Limits (two empty boxes, mid right), and Wire Account Limits (bottom section).



15. Click Continue.
16. The New User – Verification page will appear on screen:
17. Review & finalized the information on this page before clicking submit.
18. Click Submit.

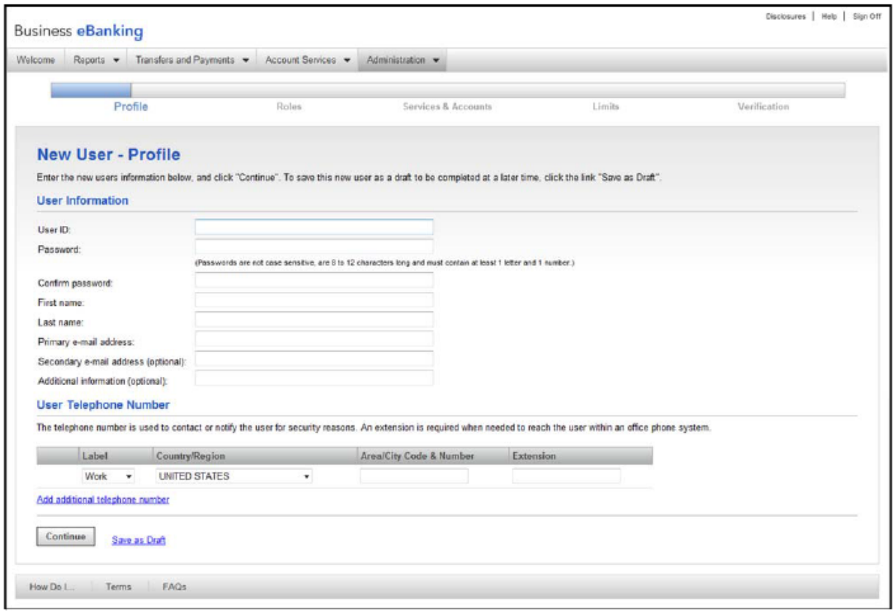


Note: For companies that do not require multiple approvals for Administration, clicking Submit creates and activates the user. For companies that require multiple approvals for Administration, clicking Submit submits the user profile for approval by other Administrators in the company.

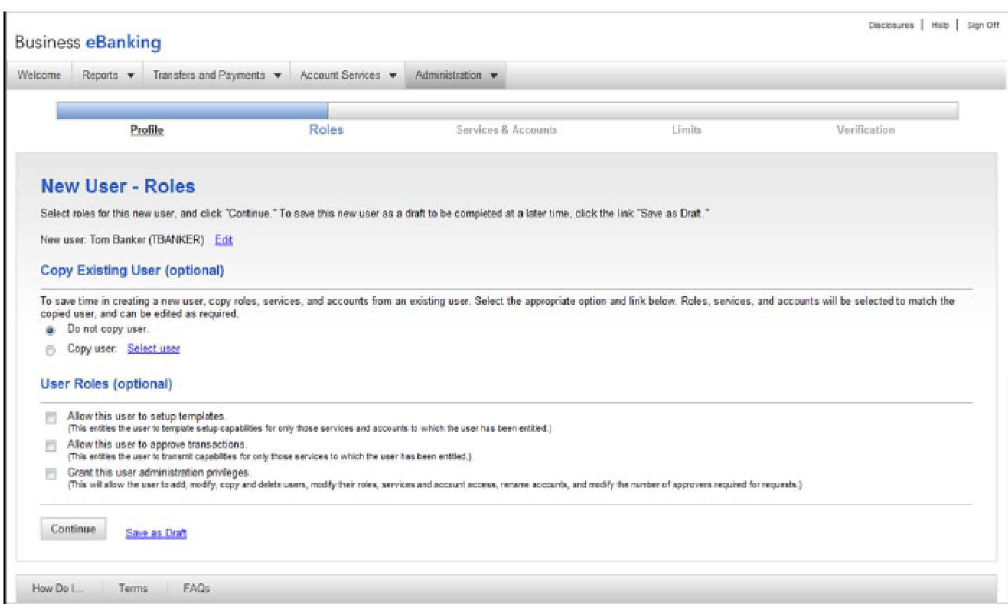
Copying Users

To copy a user's access and create a new user, complete the following:

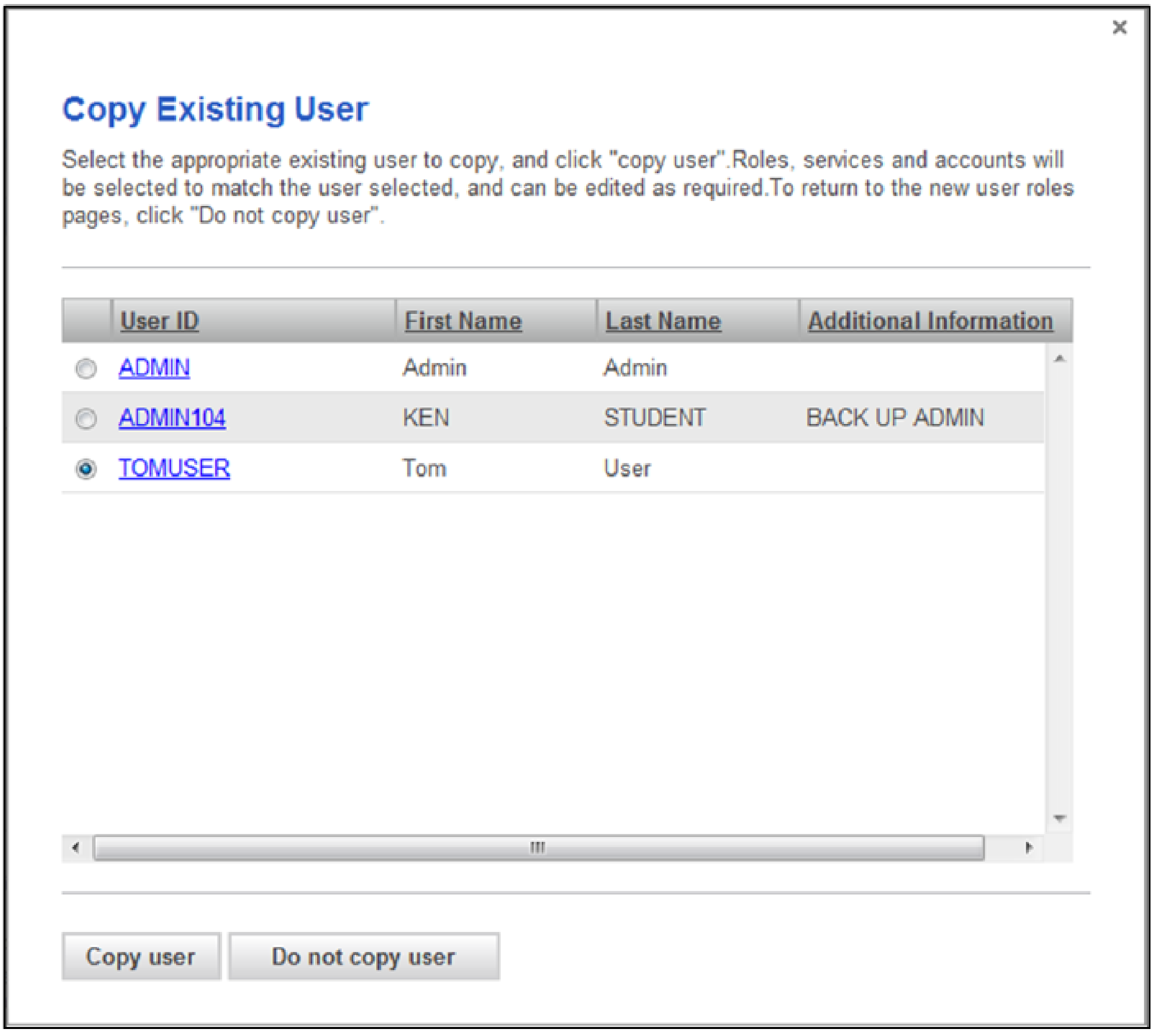
1. From the User Admin page, click the Create new user button. The New User – Profile page appears:



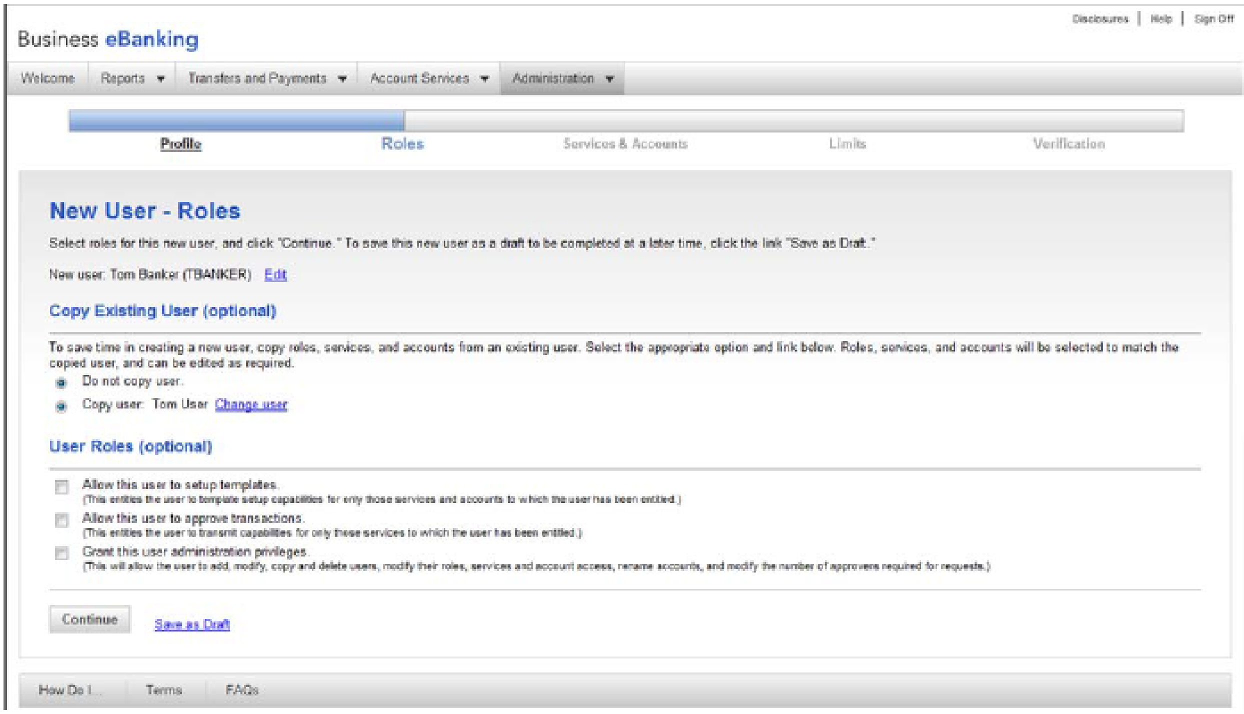
2. Complete all the fields on this page.
3. Click Continue. The New User – Roles page appears.



4. Under the Copy Existing User section, click the remote button next to Copy user.
5. Click the link Select User. A pop up window will appear:



6. Select the existing user that will be copied.
7. Click the Copy user button. The window will close. The User Profile page will appear with the selected user to be copied:



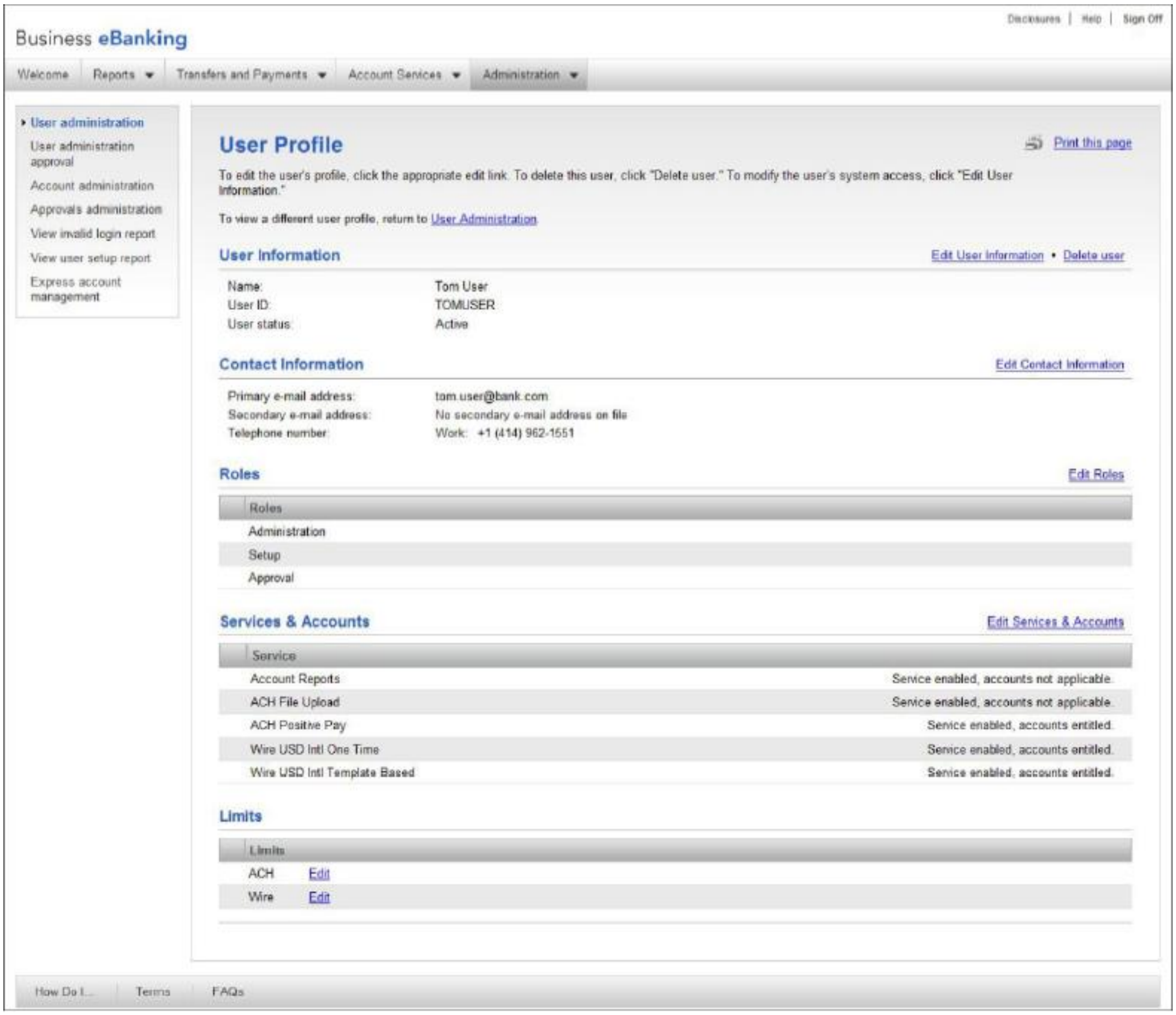
8. Click Continue.
9. The New User- Service & Accounts page will appear.
10. Add, enable, and modify the services and accounts on this page.
11. Click Continue.
12. The New User ACH Limits page will appear.
13. Set the ACH Daily Maximum Limit, ACH Daily Maximum Service Limits, and ACH Account Limits.
14. Click Continue.
15. The New User – Wire Limits page will appear.
16. Set the Wire Daily Maximum Limit, Wire Daily Maximum Service Limits, and ACH Account Limits.
17. Click Continue.
18. The New User – Verification page will appear.
19. Review the information on this page.
20. Click Submit. The New User – Confirmation page will appear.

Note: For companies that do not require multiple approvals for Administration, clicking Submit creates and activates the user. For companies that require multiple approvals for Administration, clicking Submit submits the user profile for approval by other Administrators in the company.

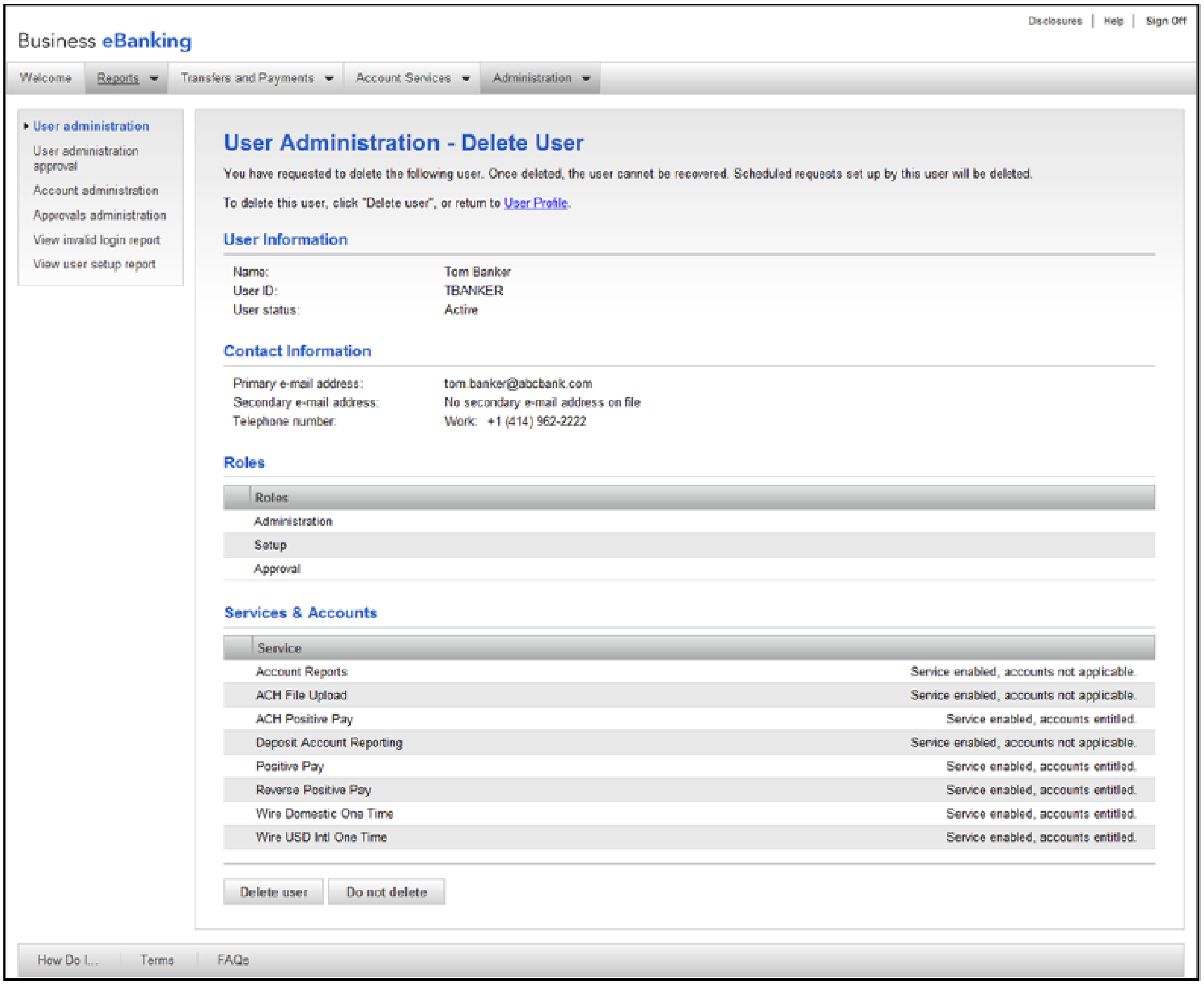
Deleting Users

To delete an existing user, complete the following:

1. From the User Administration page, click the User ID of the user you wish to modify. The User Profile page will appear.



2. Click the Delete user link. The Delete User page appears:



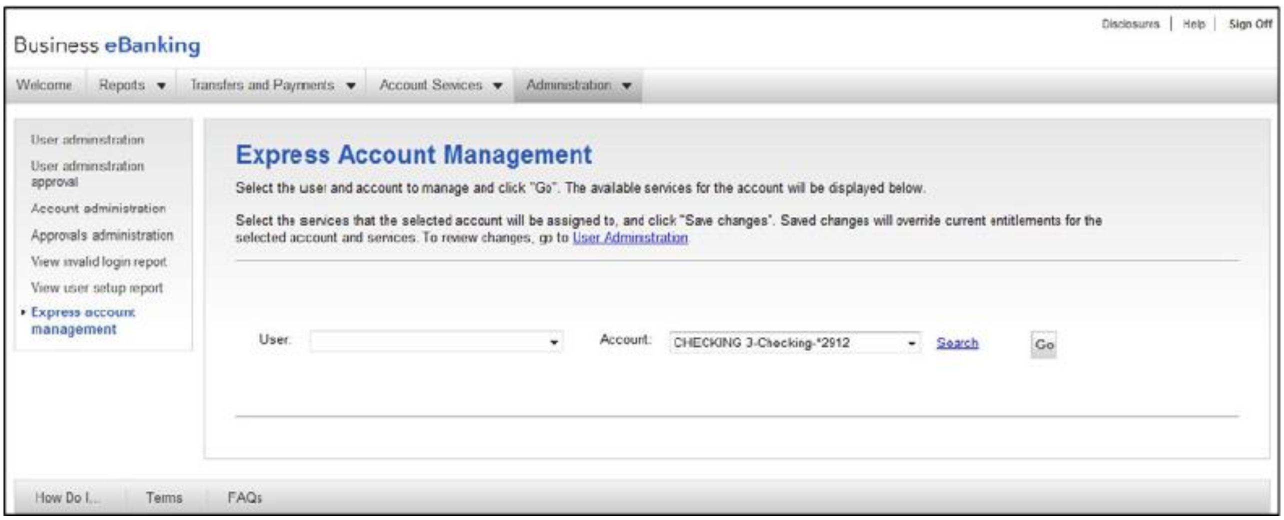
3. Click Delete User. The User Administration page appears, the deleted user is no longer listed.

Express Account Management

Company users with administrator roles also have access to the Express Account Management page. This page allows company users to quickly entitle a new account for multiple company users without having to go through the entire account for multiple company users without having to go through the entire account setup process.

To get to the Express Account Management page:

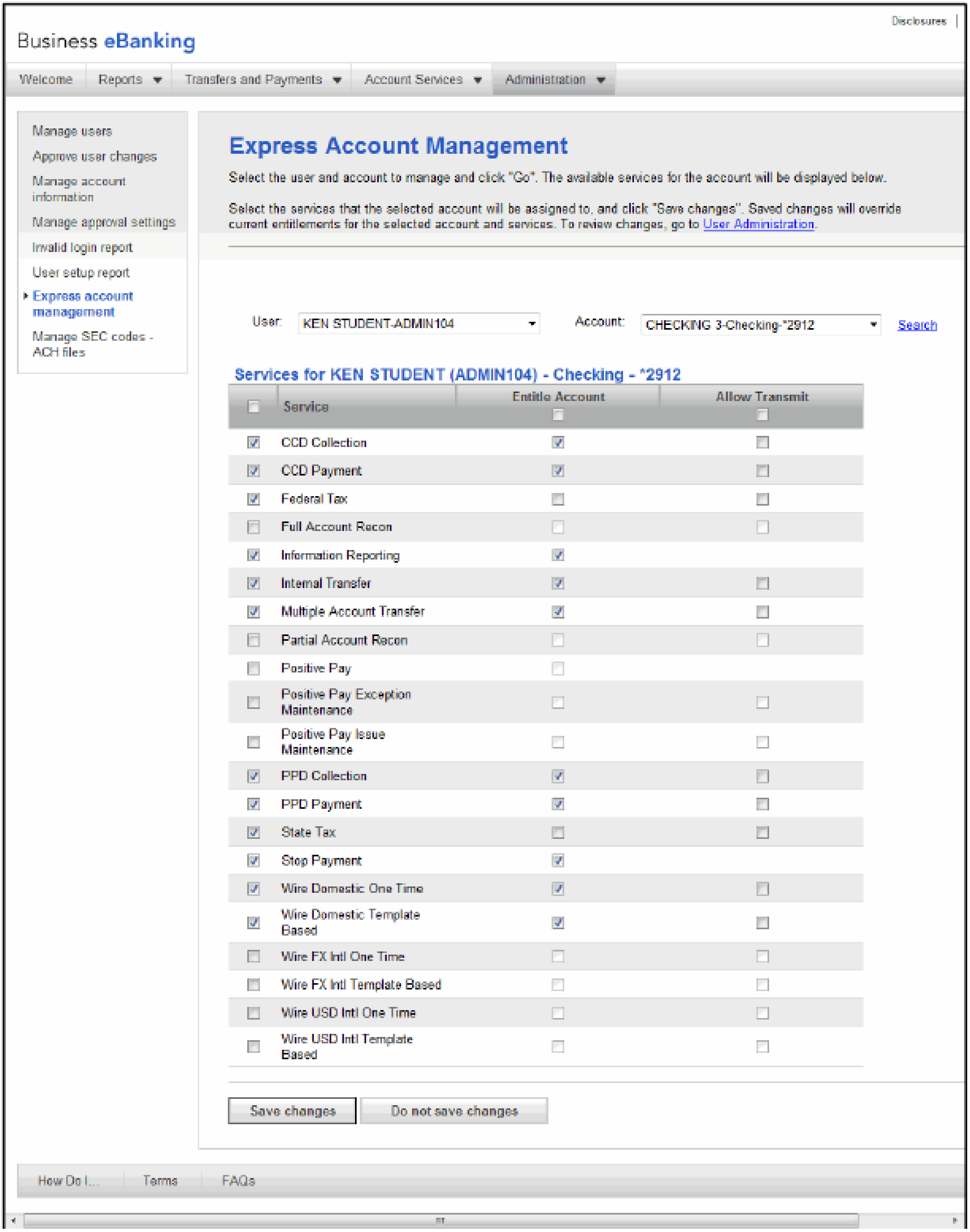
1. In the Administration tab, click Express Account Management in the Company Administration section. The Express Account Management page will appear:



2. Find a user by clicking the User drop-down list and clicking on the name.

   Note: If the company has more than 20 accounts, a Search link appears next to the Account drop-down list.

3. Click Go.
4. The Express Account Management page will appear, showing the service entitled for the user.



Note: The services that are displayed will depend on the services that are enabled for the account by the bank. If the service does not have the Transmit functionality, the check box in that column will not be shown. If the service is not enabled, the entitlement check boxes are disabled. If the user does not have the Approval role, the Allow Transmit column is not shown.

5. Once changes have been made, click Save Changes. A confirmation message will appear on the top of the page.

Note: If multiple approvals are required for Administration, modified user profiles will be submitted to the User Administration Approval queue.