

Your New Business Online Banking User Administration

Business Online Banking **Company Administrators** have greater control over your company's Online Banking services, including user access rights, entitlements, and limits. The information below outlines some of the common tasks a Company Administrator will perform.

Manage User(s)

A user who has **Manage User** assigned can create other company users.

Add a User

From the left-hand menu, select **Commercial** then **User Management**, then select **Add User**.

New User Details

PERSONAL DETAILS

First Name	Last Name	Email Address
<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone Country	Phone	
<input type="text" value="Select Country"/>	<input type="text"/>	

LOGIN DETAILS

Login ID	Password	Confirm Password
<input type="text"/>	<input type="text"/>	<input type="text"/>

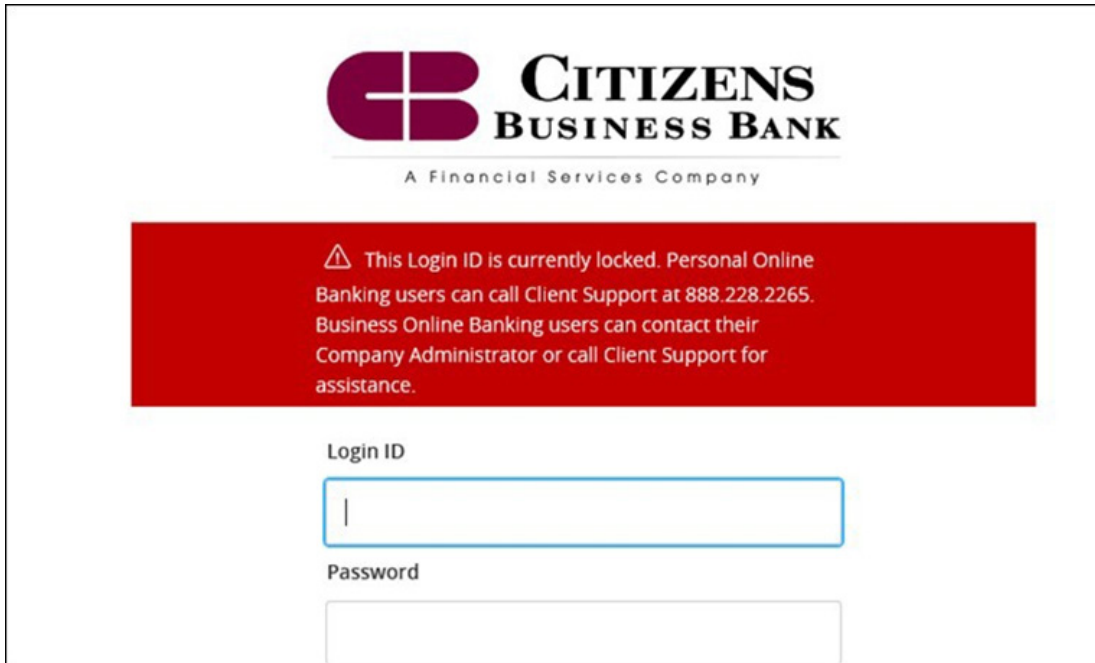
User Role

Enter fields as required:

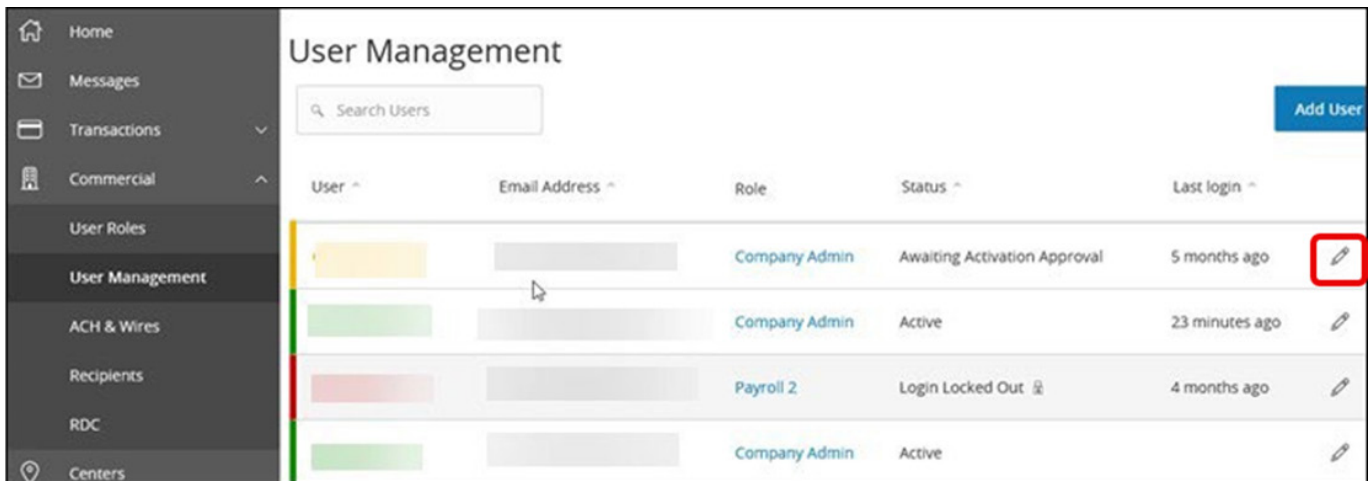
- In the **Login ID** field, enter the preferred login ID for the new user.
- In the **Password** field, enter a default password, and re-enter in the **Confirm Password** field.
- In the **User Role** drop-down list, select a role. If a new role will be created, leave the role **Unassigned** for now.
- Click **Save New User Details** to save.

Unlock User(s)

When a user enters their password incorrectly several times, they will be locked out of Online Banking and receive the notification below.



1. To unlock a user, under **Commercial**, click **User Management**. Identify the locked user and select the **Edit** (pencil) icon to edit.



2. In **User Details**, click the **Actions** ellipsis (three vertical dots), then select **Unlock login**.

User Details

Status

Active

[Edit Status](#)

PERSONAL DETAILS

First Name	Last Name	Email Address
<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone Country	Phone	
United States	<input type="text"/>	

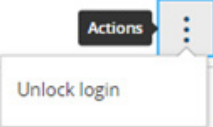
USER ROLE

[Manage User Roles](#)

Current Role

[Update Role](#)

USER LOGINS

Login Name	Channel	Status	Last Logon	Actions
<input type="text"/>	Internet	Login Locked Out	8/5/2021	

[Cancel](#) [Delete](#)

Assign Account(s)

1. Accounts added to Online Banking are added to the Company and entitled to the Company Administrator, which allows the Company Administrator to add the account to other user(s) by enabling the user role to that account.
2. Select **Commercial** then **User Roles**.
3. Identify the user role to add the account to, then select **Edit** (pencil) icon.



4. Click the **Accounts** tab, then select **Show unassigned accounts**.
5. Accounts not currently assigned to the user role will appear at the bottom of the account list. Identify the row with the account to entitle to the user role. Entitlements can be set to any combination of **View**, **Deposit**, and **Withdraw**.
6. Assign the appropriate entitlements to the account for the user.
7. Click **Save** to finish.