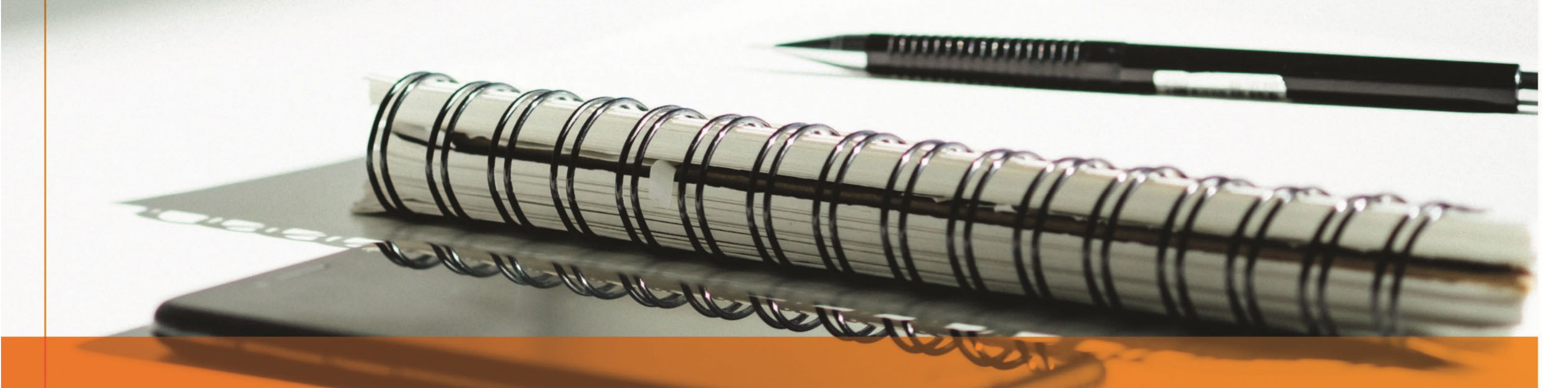


Business Online Banking
Adding a new user

Adding a New User

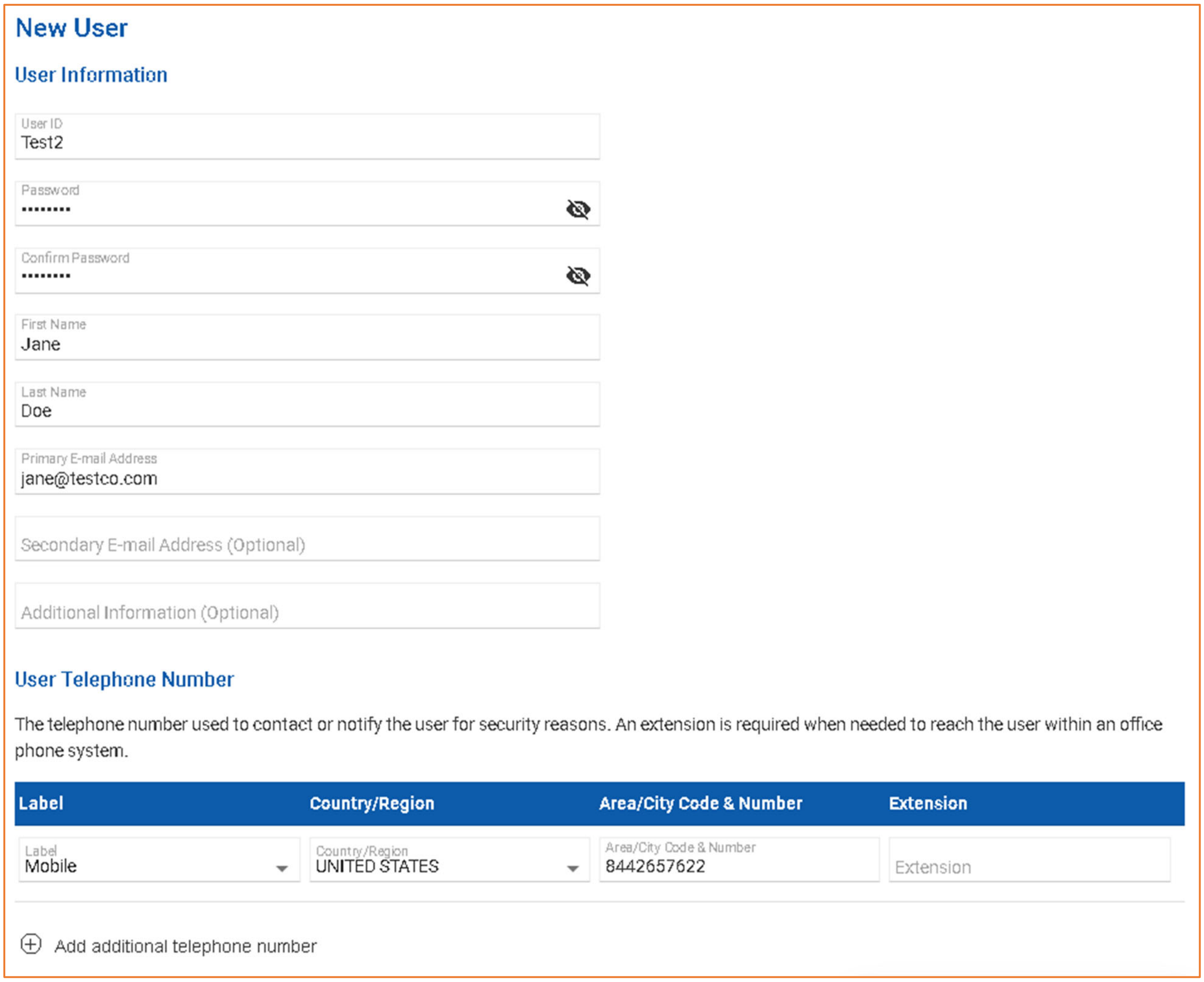
To begin click **Administration** > **Company Administration > Create New User** (Create New User)

Part 1: User Information

1. Enter the User's Information
   a. User ID
      <u>*User ID requirements*</u>
      - Should be at least four (4) characters in length but no more than twenty-six (26) characters.
      - Alpha-numeric: should include a combination of letters and numbers.
      - Cannot be the same User ID as another user in the company.
   b. Password
      ! This will only be a temporary password. The user will need to update the password when logging in for the first time.
      <u>*Temporary Password requirements*</u>
      - Must be at least eight (8) characters in length, but no more than twelve (12) characters long.
      - Must include a combination of two of the following types of characters: letters, numbers (0 - 9), and a special character (# $ @).
      - Cannot include more than three consecutive identical characters. For example, "t@BBBBama" is not allowed, but "t@BBBama" is.
      - Cannot be the same as the associated user ID.
   c. Confirm Password
   d. First Name
   e. Last Name
   f. Primary E-mail Address
   g. Secondary E-mail Address (Optional)
   h. Additional Information (Optional)- We recommend that you input a security code or identifier in this field. The Bank can use this information to authenticate your secondary users when they call the Bank for assistance.
2. Enter the User's Telephone Number(s)
   a. Label: **Work**, **Mobile** or **Home.**
      *If the user plans on utilizing text messages for the One-Time Security code, set the label to **Mobile.***
   b. Country/Region.

c. Area/City Code & Number - enter the phone number without any spaces or special characters; digits only. For instance, “8442657622” instead of “(844) 265-7622.”
d. Extension (if applicable).

3. Click the **Add additional telephone number** if the user has more than one phone number.



4. Once completed, click **Continue**
    a. At any point in the process, you can click on **Save as Draft** to continue working on this at a later time.

Part 2: Roles

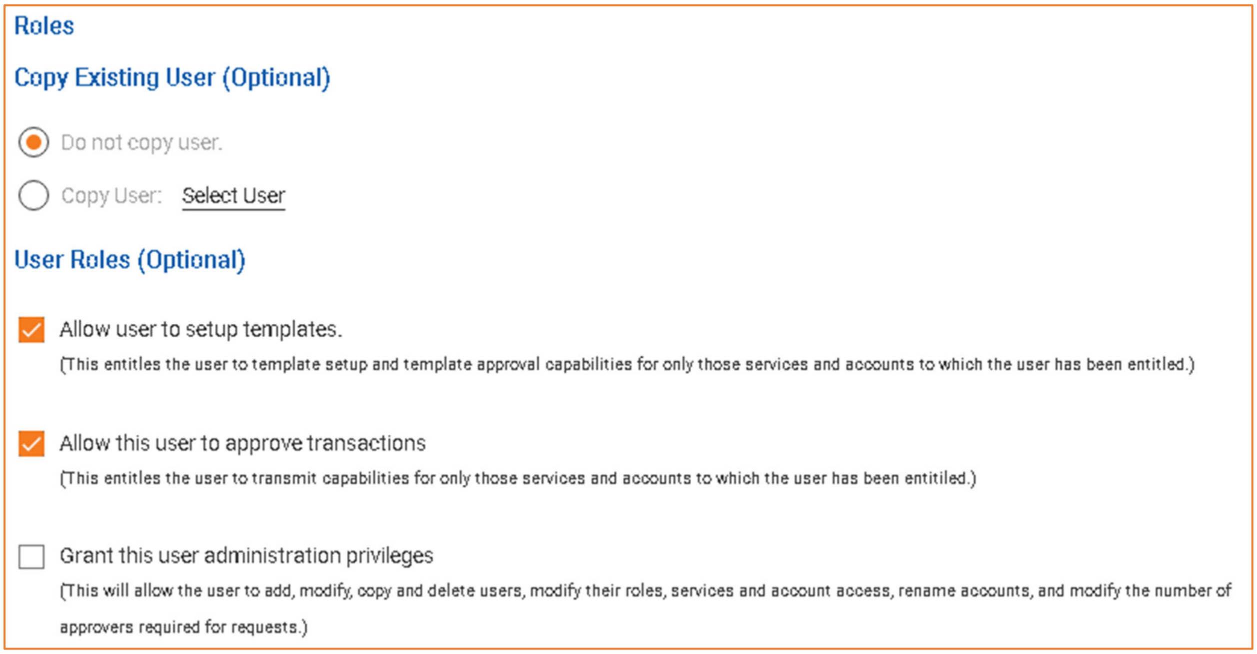
1. Copy Existing User (optional)
    a. Do not copy user – continue creating the user with nothing prefilled. (This is the default selection)
    b. Copy user – You are allowed to select and “copy” a previously existing user. This action will prefill all the options for the rest of this process, to mimic the copied user. Please note that if you “copy” an Administrator, the new user will also have all Administration privileges.
2. Select the appropriate Roles for the user.
    a. **Allow user to setup templates (Setup Role)**– This will allow the user to <u>setup</u> the templates for money movement transactions (e.g. Wires, Internal, etc.).

b. **Allow this user to approve transactions (Approval Role)** – This will give the user the ability to approve money movement transactions. Users must have the Approval Role entitled to successfully transfer funds (e.g. internal transfers, wires, ACH).

c. **Grant this user administration privileges (Admin Role)** – This will give the user access to create and/or manage additional users, rename accounts, or modify company approval settings.

! ***If you are creating a "view-only" user, do not select any of the roles. User Roles are optional and are not required to continue.***

3. Once the user roles have been selected, click **Continue**



Part 3: Services & Accounts

Enable the respective accounts and services for this user. To enable a service and assign accounts, you will click on the ⊕ on the same row of the specific service. If there are multiple accounts for a service, you will need to click the check box (✓) next to each account.

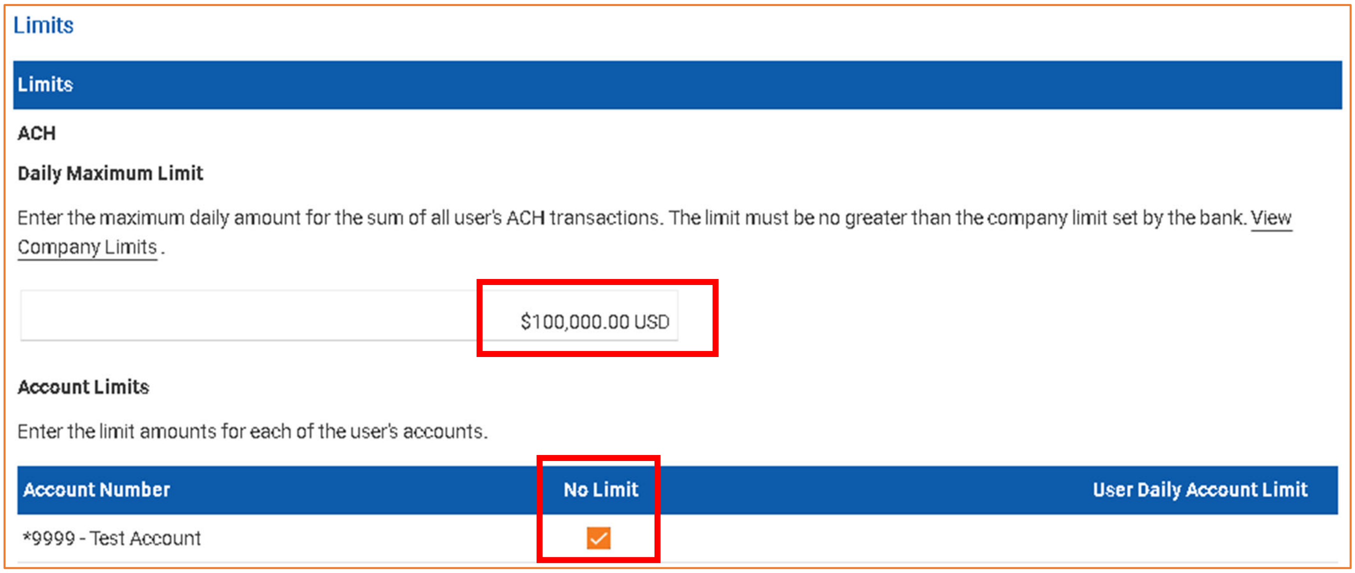
- **Entitled Account** – This will allow the user to have viewing and/or setup access to the account.
- **Allow Transmit** – This will allow the user to have the ability of approving a money movement transaction, in relation to the account. (Only users with the *Approval Role* will show this option)


Wire Domestic One Time — Service enabled, accounts entitled.

Description	Account Number	TRC	Entitled Account	Allow Transmit
Test Account	999999999	122243402	✓	✓

Part 4: Limits

If applicable, click on the edit icon to enter a specific limit for this user. If no limit is entered, the user will default to the company maximum limits.



Once completed, click **Continue.**

Part 5: Create User

1. You will now see a confirmation screen to verify the new user's setup. Verify the new user setup. Click on the to make any edits.
2. Click **Create User** to finish the setup.

You will need to provide the **Company ID**, **User ID** and the temporary **Password** to the new user, as this system will <u>not</u> send out any messages after the user is created. Please be sure to send this information securely, for your protection.