

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="v"/>	<input type="text"/>	

LOGIN DETAILS

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

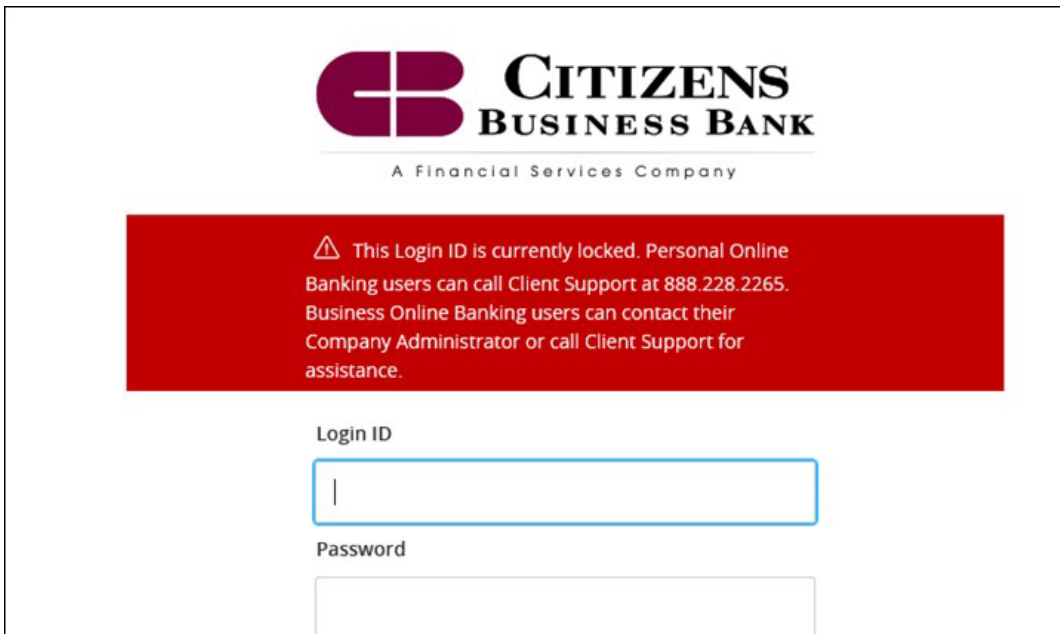
User Role

Enter fields as required:

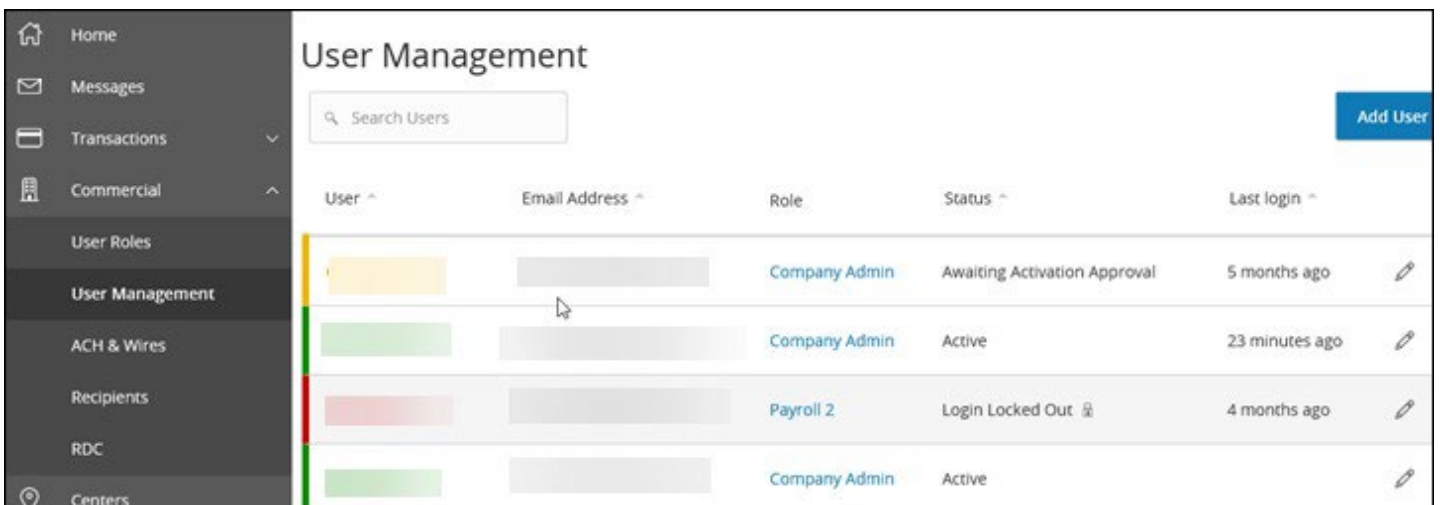
- In the Login ID field, enter the preferred login ID for the new user.
- In the Password field, enter a default password, and re-enter in the Confirm Password field.
- In the User Role drop-down list, select a role. If a new role will be created, leave the role Unassigned for now.
- Click Save.

Unlock User(s)

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

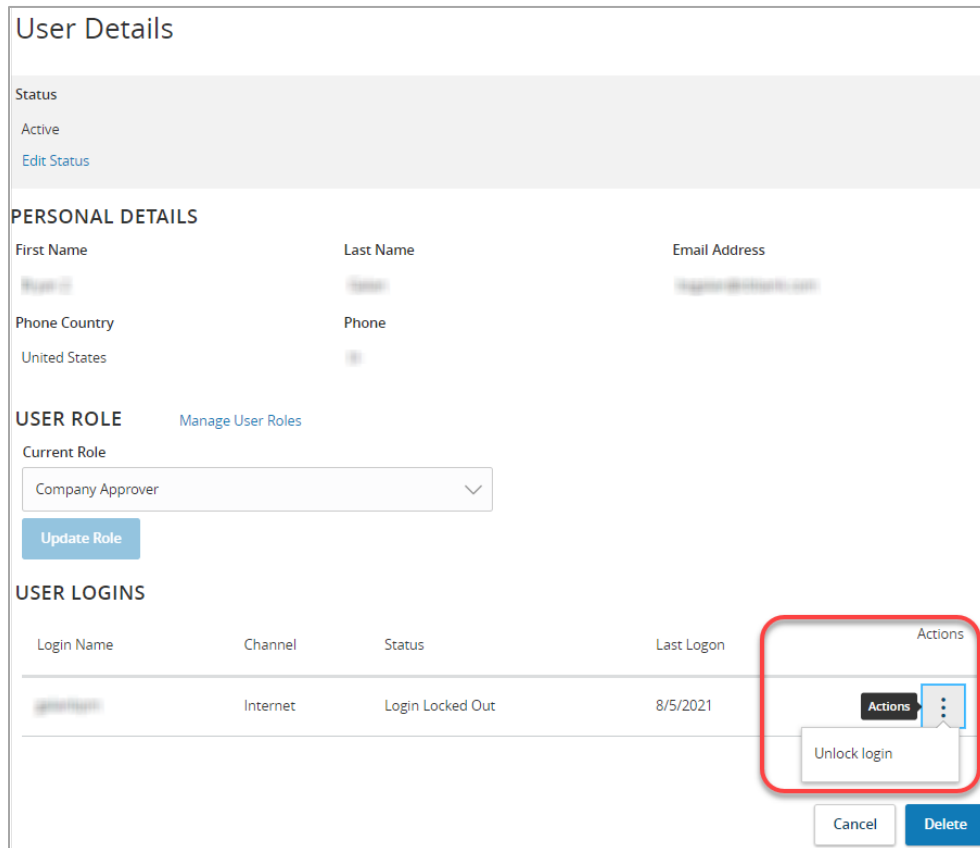


1. To unlock a user, under Commercial, click User Management. Identify the locked user and select the Edit (pencil) icon to edit.



User	Email Address	Role	Status	Last login	
		Company Admin	Awaiting Activation Approval	5 months ago	
		Company Admin	Active	23 minutes ago	
		Payroll 2	Login Locked Out	4 months ago	
		Company Admin	Active		

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



User Details

Status
Active
[Edit Status](#)

PERSONAL DETAILS

First Name: [Redacted] Last Name: [Redacted] Email Address: [Redacted]
Phone Country: United States Phone: [Redacted]

USER ROLE [Manage User Roles](#)
Current Role: Company Approver
[Update Role](#)

USER LOGINS

Login Name	Channel	Status	Last Logon	Actions
[Redacted]	Internet	Login Locked Out	8/5/2021	<ul style="list-style-type: none"> Unlock login

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

Assign Account(s)

- 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 users by enabling the user role to that account.
- Select Commercial then User Roles.
- Identify the user role to add the account to, then select Edit (pencil) icon.



User Roles | ACCOUNTS ⓘ

User Management | [Show unassigned accounts](#)

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>	Labels
[Empty table body]					

- Click the Accounts tab, then select Show unassigned accounts.
- 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.
- Assign the appropriate entitlements to the account for the user.
- Click Save to finish.