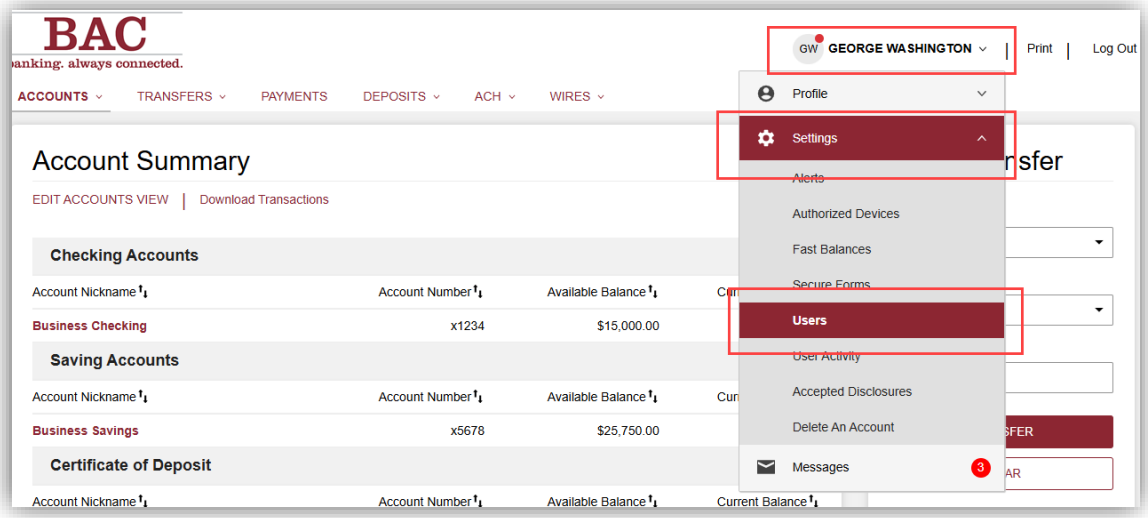
Managing Users

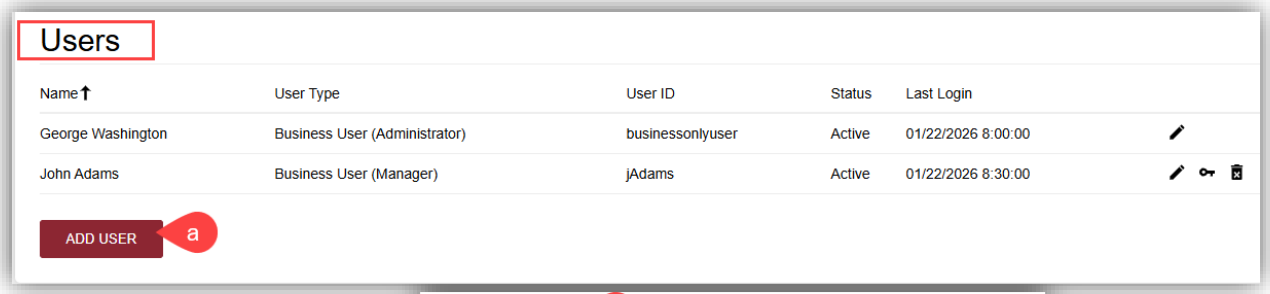
Managing Business Users

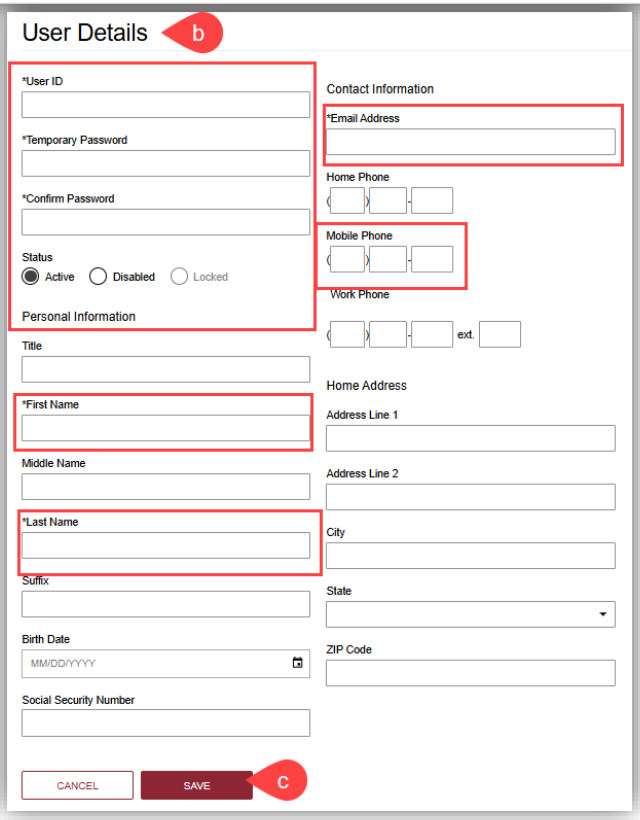
1. **Login to Digital Banking**
    a. Select your profile name on the top right side of the homepage.
    b. Select “Settings”.
    c. Select “Users”.



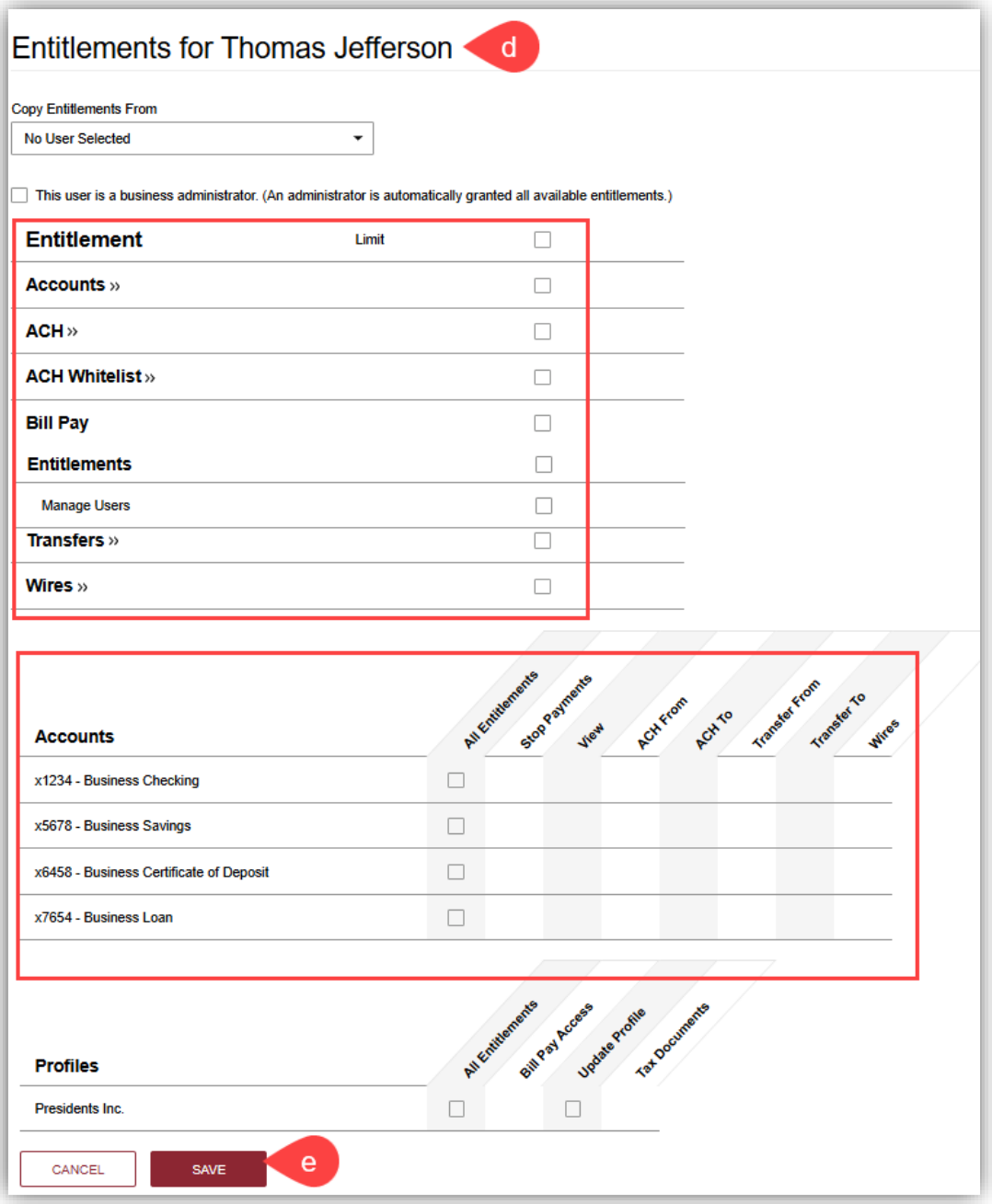
2. **Adding New Users** (see images on page 2 and 3)
    a. Select the “Add User” button on the “Users” homepage.
    b. Enter the user’s information in the required fields on the “User Details” view.
        i. User ID
        ii. Temporary Password
        iii. Confirm Password
        iv. Status
        v. First and Last Name
        vi. Email Address
        vii. Mobile Phone
    c. Select “Save”.
    d. Set Entitlements for the user.
        i. Select the “Copy Entitlements from” drop-down menu to copy entitlements from an existing user, if applicable.
        ii. Check/uncheck the appropriate Entitlement permissions
            1. Accounts
            2. ACH
            3. Bill Pay
            4. Cards
            5. Entitlements
            6. Transfers
            7. Wires
            8. Zelle
    e. Select “Save”.

Managing Users





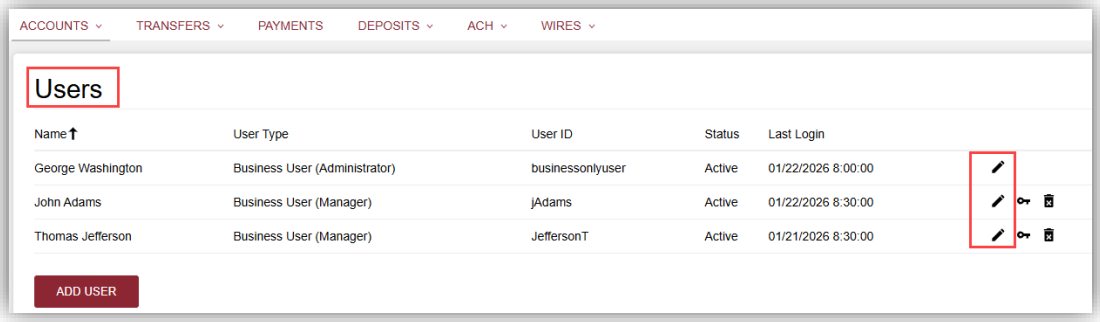
Managing Users



Managing Users

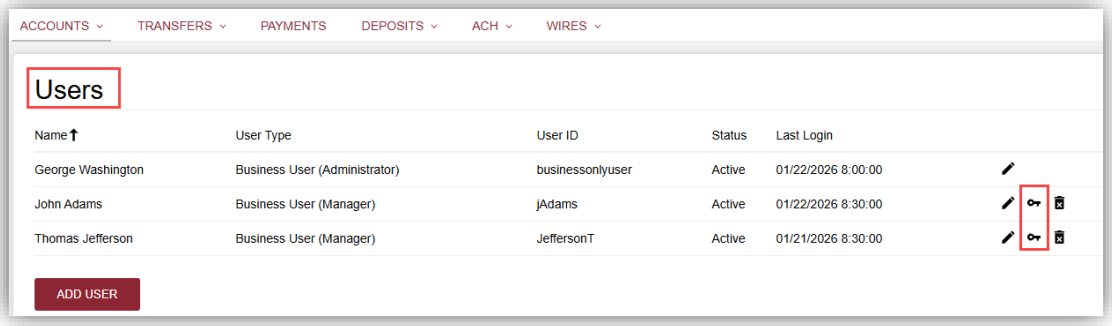
3. Editing Users

a. Select the “Edit” (pencil) icon on the “Users” homepage for the desired user.
b. Edit fields, as necessary.
c. Select “Save”.



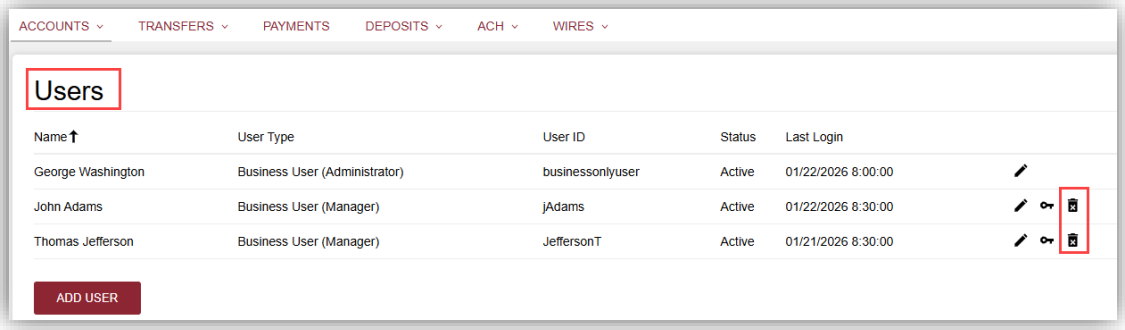
4. Editing Entitlements

d. Select the “Key” icon on the “Users” homepage for the desired user.
e. Edit entitlements, as necessary.
f. Select “Save”.

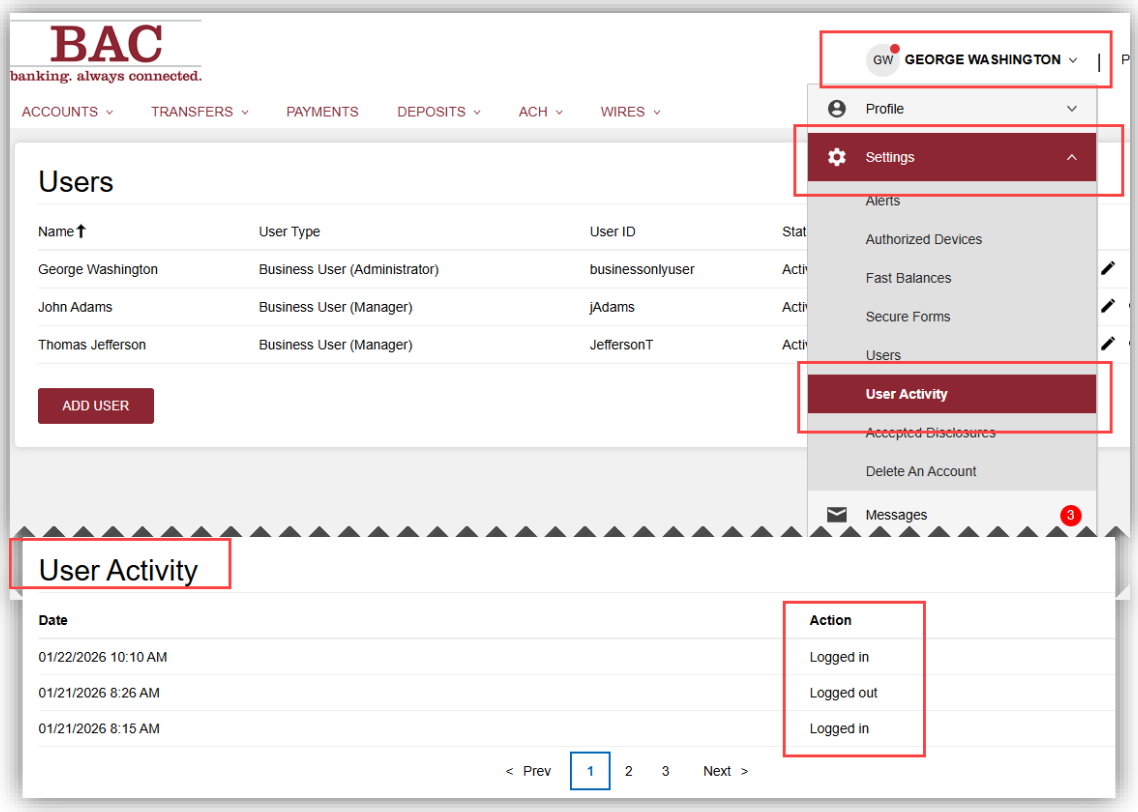


5. Deleting Users

e. Select the “Delete” (trashcan) icon on the “Users” homepage for the desired user.
f. Select “OK” on the confirmation popup.



Managing Users

6. Viewing Account Activity

a. Select your profile name on the top right side of the homepage.
b. Select “Settings”.
c. Select “User Activity”.