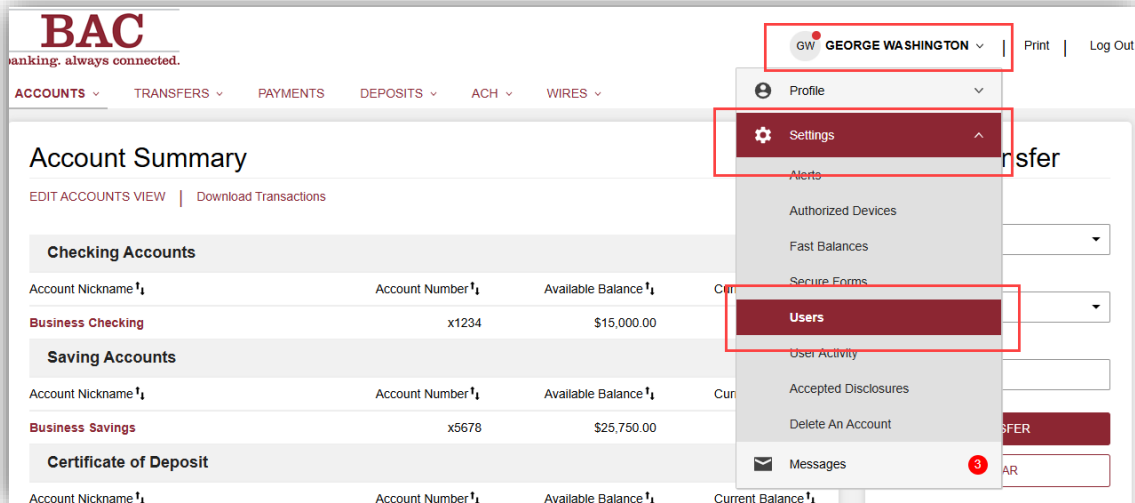


Managing Business Users

1. Login to Digital Banking

- Select your profile name on the top right side of the homepage.
- Select “Settings”.
- Select “Users”.



2. Adding New Users (see images on page 2 and 3)

- Select the “Add User” button on the “Users” homepage.
- Enter the user’s information in the required fields on the “User Details” view.
 - User ID
 - Temporary Password
 - Confirm Password
 - Status
 - First and Last Name
 - Email Address
 - Mobile Phone
- Select “Save”.
- Set Entitlements for the user.
 - Select the “Copy Entitlements from” drop-down menu to copy entitlements from an existing user, if applicable.
 - Check/uncheck the appropriate Entitlement permissions
 - Accounts
 - ACH
 - Bill Pay
 - Cards
 - Entitlements
 - Transfers
 - Wires
 - Zelle
- Select “Save”.

Digital Banking – Cash Management

Managing Users

Users

Name ↑	User Type	User ID	Status	Last Login	
George Washington	Business User (Administrator)	businessonlyuser	Active	01/22/2026 8:00:00	
John Adams	Business User (Manager)	jAdams	Active	01/22/2026 8:30:00	

ADD USER a

User Details b

*User ID

*Temporary Password

*Confirm Password

Status

☒ Active
 ☐ Disabled
 ☐ Locked

Personal Information

Title

*First Name

Middle Name

*Last Name

Suffix

Birth Date

MM/DD/YYYY

Social Security Number

Contact Information

*Email Address

Home Phone

Mobile Phone

Work Phone

ext.

Home Address

Address Line 1

Address Line 2

City

State

ZIP Code

CANCEL SAVE c

Entitlements for Thomas Jefferson
d

Copy Entitlements From
No User Selected

☐ This user is a business administrator. (An administrator is automatically granted all available entitlements.)

Entitlement	Limit	
Accounts »		<input type="checkbox"/>
ACH »		<input type="checkbox"/>
ACH Whitelist »		<input type="checkbox"/>
Bill Pay		<input type="checkbox"/>
Entitlements		<input type="checkbox"/>
Manage Users		<input type="checkbox"/>
Transfers »		<input type="checkbox"/>
Wires »		<input type="checkbox"/>

Accounts

	All Entitlements	Stop Payments	View	ACH From	ACH To	Transfer From	Transfer To	Wires
x1234 - Business Checking	<input type="checkbox"/>							
x5678 - Business Savings	<input type="checkbox"/>							
x6458 - Business Certificate of Deposit	<input type="checkbox"/>							
x7654 - Business Loan	<input type="checkbox"/>							

Profiles

Presidents Inc.	<input type="checkbox"/>	<input type="checkbox"/>
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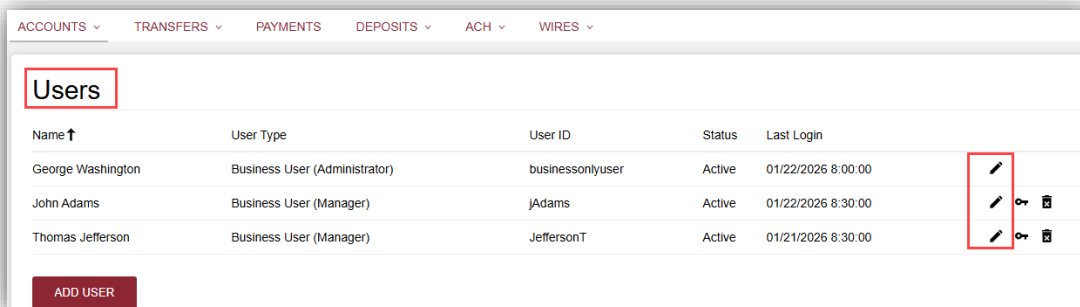
CANCEL

SAVE








e

3. Editing Users

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



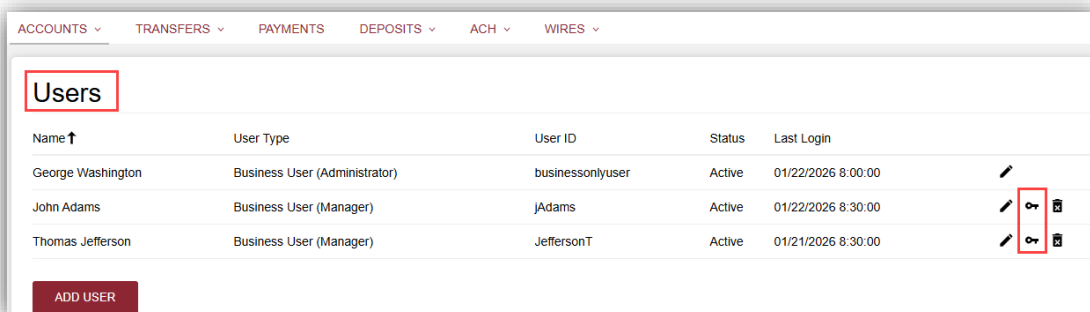
The screenshot shows the 'Users' management page with a table of users. The 'Edit' (pencil) icon is highlighted in a red box for the user George Washington.

Name ↑	User Type	User ID	Status	Last Login	
George Washington	Business User (Administrator)	businessonlyuser	Active	01/22/2026 8:00:00	
John Adams	Business User (Manager)	JAdams	Active	01/22/2026 8:30:00	  
Thomas Jefferson	Business User (Manager)	JeffersonT	Active	01/21/2026 8:30:00	  








[ADD USER](#)

4. Editing Entitlements

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



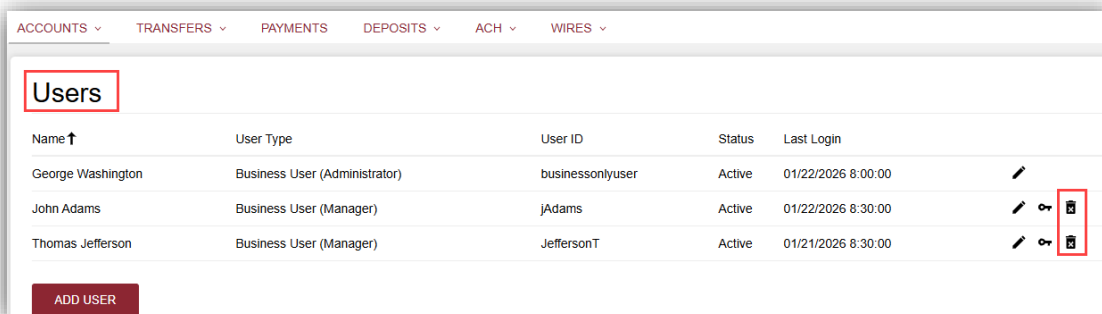
The screenshot shows the 'Users' management page with a table of users. The 'Key' icon is highlighted in a red box for the user John Adams.

Name ↑	User Type	User ID	Status	Last Login	
George Washington	Business User (Administrator)	businessonlyuser	Active	01/22/2026 8:00:00	
John Adams	Business User (Manager)	JAdams	Active	01/22/2026 8:30:00	  
Thomas Jefferson	Business User (Manager)	JeffersonT	Active	01/21/2026 8:30:00	  








[ADD USER](#)

5. Deleting Users

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



The screenshot shows the 'Users' management page with a table of users. The 'Delete' (trashcan) icon is highlighted in a red box for the user John Adams.

Name ↑	User Type	User ID	Status	Last Login	
George Washington	Business User (Administrator)	businessonlyuser	Active	01/22/2026 8:00:00	
John Adams	Business User (Manager)	JAdams	Active	01/22/2026 8:30:00	  
Thomas Jefferson	Business User (Manager)	JeffersonT	Active	01/21/2026 8:30:00	  

[ADD USER](#)

6. Viewing Account Activity

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

The screenshot displays the BAC Community Bank digital banking interface. At the top right, the user's profile name 'GEORGE WASHINGTON' is highlighted with a red box. Below it, a dropdown menu is open, showing options like Profile, Settings, Alerts, Authorized Devices, Fast Balances, Secure Forms, Users, User Activity, Accepted Disclosures, Delete An Account, and Messages. The 'Settings' option is highlighted with a red box. Below the 'Settings' dropdown, the 'User Activity' option is highlighted with a red box. The main content area shows a table of users with columns for Name, User Type, User ID, and Status. Below the table is an 'ADD USER' button. At the bottom, the 'User Activity' section is highlighted with a red box, showing a table with columns for Date and Action. The 'User Activity' table has three rows of data: 01/22/2026 10:10 AM (Logged in), 01/21/2026 8:26 AM (Logged out), and 01/21/2026 8:15 AM (Logged in). The 'Action' column is highlighted with a red box. At the bottom of the page, there is a pagination control showing '< Prev 1 2 3 Next >'.

Name↑	User Type	User ID	Status
George Washington	Business User (Administrator)	businessonlyuser	Active
John Adams	Business User (Manager)	jAdams	Active
Thomas Jefferson	Business User (Manager)	JeffersonT	Active

ADD USER

Date	Action
01/22/2026 10:10 AM	Logged in
01/21/2026 8:26 AM	Logged out
01/21/2026 8:15 AM	Logged in

< Prev 1 2 3 Next >