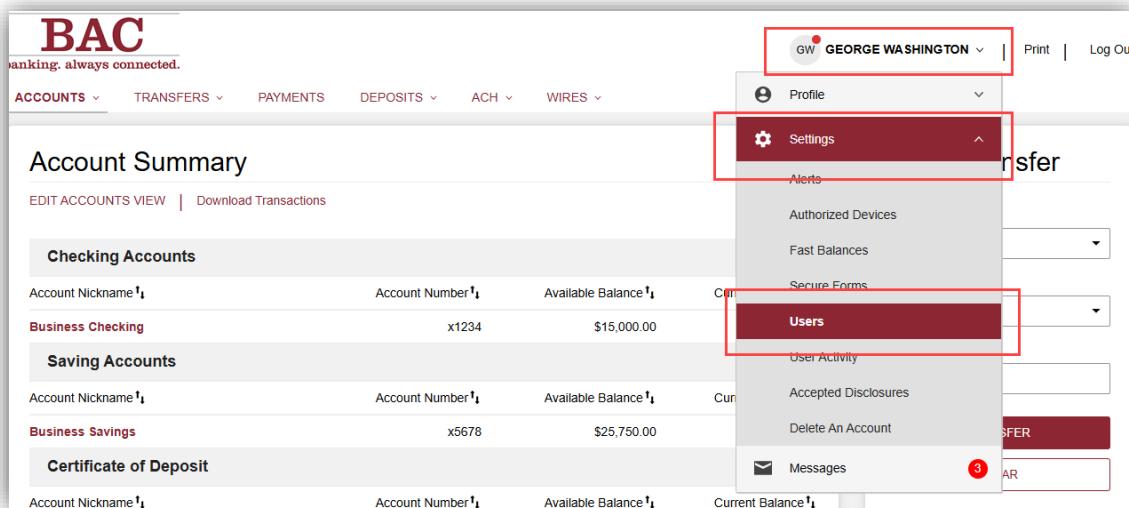


### Managing Business Users

#### 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”.

**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** 

**User Details** 

**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** 

**Home Address**

**Address Line 1** 

**Address Line 2** 

**City** 

**State** 

**ZIP Code** 

**CANCEL** **SAVE** 

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	<input type="checkbox"/>
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	<input type="checkbox"/>	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"/>								

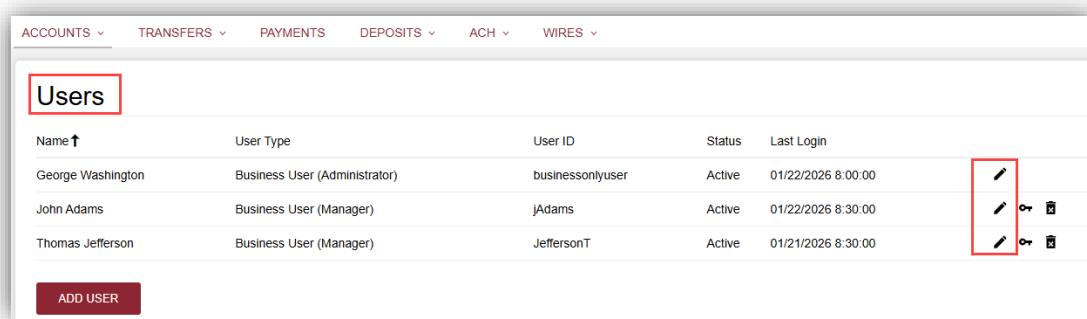
  

Profiles	<input type="checkbox"/>	All Entitlements	Bill Pay Access	Update Profile	Tax Documents
Presidents Inc.	<input type="checkbox"/>				

e CANCEL SAVE

### 3. Editing Users

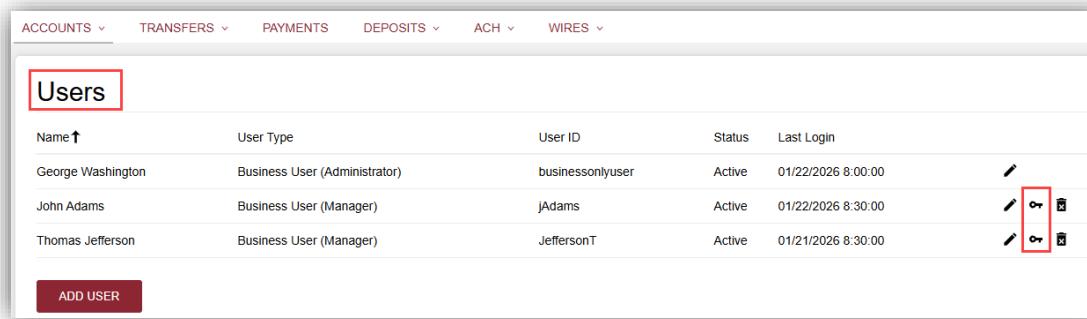
- Select the “Edit” (pencil) icon on the “Users” homepage for the desired user.
- Edit fields, as necessary.
- Select “Save”.



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

### 4. Editing Entitlements

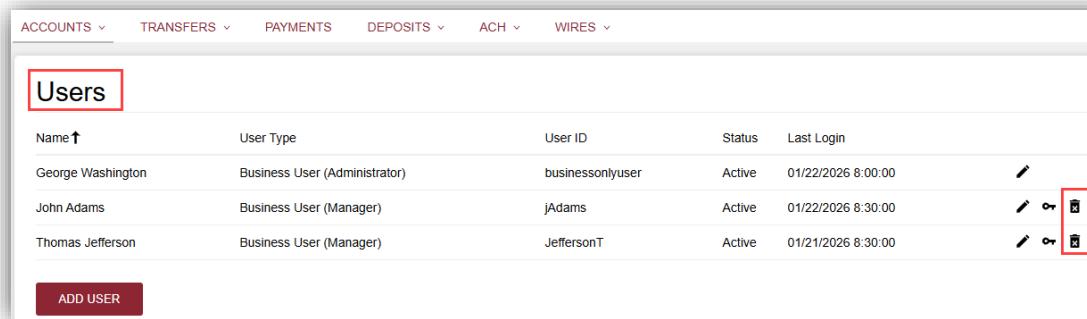
- Select the “Key” icon on the “Users” homepage for the desired user.
- Edit entitlements, as necessary.
- Select “Save”.



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

### 5. Deleting Users

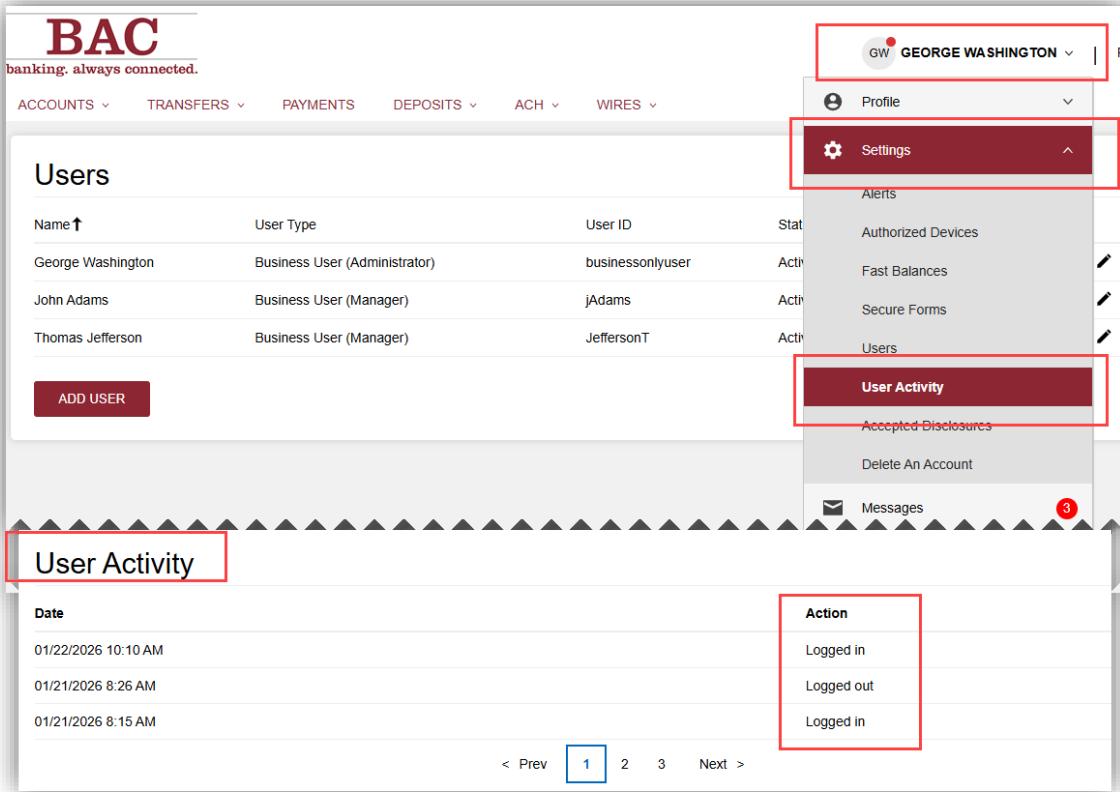
- Select the “Delete” (trashcan) icon on the “Users” homepage for the desired user.
- Select “OK” on the confirmation popup.



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

### 6. Viewing Account Activity

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



The screenshot shows the BAC Digital Banking interface. At the top, there is a navigation bar with links for ACCOUNTS, TRANSFERS, PAYMENTS, DEPOSITS, ACH, and WIRES. On the far right, a user profile is displayed with the name "GEORGE WASHINGTON" and a profile picture. A red box highlights this profile area. Below the navigation bar, a sidebar menu is open under the "Settings" section. The "User Activity" option is highlighted with a red box. Other menu items include Alerts, Authorized Devices, Fast Balances, Secure Forms, and Users. At the bottom of the sidebar, there is a "Messages" section with a red box and a notification badge showing the number "3".

**Users**

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

**User Activity**

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 >