

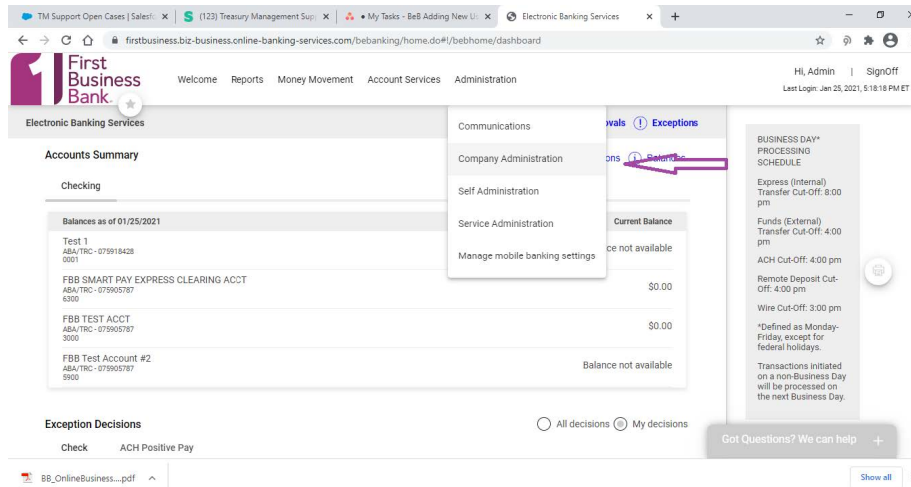
ADDING A NEW USER

ONLINE BUSINESS BANKING



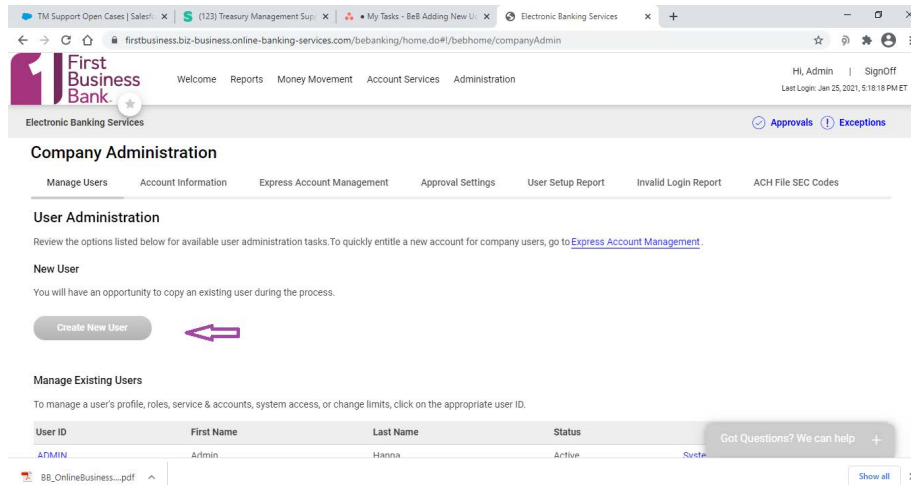
1. MANAGE USERS

From the Welcome screen hover over the “Administration” Tab and choose “Company Administration.”



2. CREATE

Your list of users will appear on the screen. Click the “Create new user” button.



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3. NEW USER PROFILE

For the user information you will assign a user ID and initial password. Once you have entered all the information required click "Continue."

The screenshot shows the 'New User' profile creation form in the First Business Bank administration interface. The form is titled 'Company Administration' and includes a navigation menu with options like 'Manage Users', 'Account Information', 'Express Account Management', 'Approval Settings', 'User Setup Report', 'Invalid Login Report', and 'ACH File SEC Codes'. The 'New User' section contains several input fields: 'User ID', 'Password', 'Confirm Password', 'First Name', 'Last Name', 'Primary E-mail Address', and 'Secondary E-mail Address (Optional)'. Below these is a 'User Telephone Number' section with a table for adding numbers. The table has columns for 'Label', 'Country/Region', 'Area/City Code & Number', and 'Extension'. A 'Work' telephone number is entered with 'UNITED STATES' as the country and 'Area/City Code & Number' as the extension. At the bottom of the form are 'Continue' and 'Save as Draft' buttons, and a 'Show all' button is visible in the footer.

4. ROLES

If you choose not to copy another user you will need to decide what Roles you wish the new user to have. **Setup** entitles the user to template setup capabilities. If you wish to have the user **approve** transactions you will need to check the second box. If you would like them to do both click both boxes.

* Please note: We recommend that you do not give other users administrative privileges.

Click "Continue" when done.

This screenshot shows the 'Roles' section of the 'New User' profile creation form. It includes a 'Profile' section with fields for 'Name', 'User ID', 'Primary E-mail Address', and 'Telephone Number', which are populated with 'Tanner One', 'Tant1', 'tannerone@firstbusinessbank.com', and '+1 (913) 717-6224' respectively. The 'Roles' section has a 'Copy Existing User (Optional)' section with radio buttons for 'Do not copy user' (selected) and 'Copy User' (with a 'Select User' link). Below this is the 'User Roles (Optional)' section with three checkboxes: 'Allow user to setup templates', 'Allow this user to approve transactions', and 'Grant this user administrative privileges'. Each checkbox has a small explanatory text below it. At the bottom of the form are 'Continue' and 'Save as Draft' buttons, and a 'Show all' button is visible in the footer.

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5. NEW USER SERVICES & ACCOUNTS

The next screen allows you to enable individual services for the user. This screen will vary depending on the services you have elected. Click on the plus sign to enable a service for this user. An additional line will appear to choose accounts for the service that should be enabled for this user (as indicated with arrow). Click Continue.

First Business Bank

Welcome | Reports | Money Movement | Account Services | Administration

Hi, Admin | Sign Off
Last Login: Jan 24, 2021, 8:22:17 AM

Manage Users | Account | Admin | Express Account Management | Approval Settings | User Setup Report | Inactive Login Report | ACH File SEC Codes

New User

Profile

Name: Tester One
User ID: Test1
Primary Email Address: test1@firstbusinessbank
Telephone Number: Work: +1 (913) 717 4454

Roles

Enabled Roles: Setup

Services & Accounts (Optional)

To enable a service and assign accounts, click the appropriate link. To disable all services and accounts, click "Clear All".

2 of 40 services enabled [Clear All](#)

Service	Service enabled, accounts not applicable.	
<input checked="" type="checkbox"/> ACH File Upload	Service enabled, accounts not applicable.	+
<input type="checkbox"/> ACH Positive Pay		+
<input type="checkbox"/> ACH Reporting		+
<input checked="" type="checkbox"/> Bill Pay	Service enabled.	+

NOTE: user who are assigned the Administration role have access to all accounts within Bill Pay, regardless of the entitlements set here.

Description	Account Number	TRC	Enabled Account
FBB TEST ACCT	107553000	075903767	<input type="checkbox"/>

[Collapse](#)

Get Questions? We can help. +

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6. LIMITS

The Limits screen will allow you to set limits on certain services; if no limit is entered it will default to the maximum amount allowed for those services. Click "Continue" when done. To Change a limit click on the pencil icon and enter the limits.

The screenshot shows the 'New User' configuration page in the First Business Bank administration system. The 'Limits' section is highlighted with a red arrow, indicating that limits can be edited. The form includes fields for Name, User ID, Primary Email Address, Telephone Number, Roles, Enabled Roles, Services & Accounts, and Limits. The 'Limits' section shows 'Bill Pay' with a pencil icon next to it. The page also includes navigation links like 'Home', 'Reports', 'Money Movement', 'Account Services', and 'Administration'.

7. VERIFICATION

The final screen is a summary of the steps you have just completed. Verify that the information is correct and click "Create User." If any of the information needs to be changed click on the pencil and paper icon next to the topic and make the corrections.

The screenshot shows the 'New User' verification page in the First Business Bank administration system. The 'Limits' section is highlighted with a red arrow, indicating that limits can be edited. The form includes fields for Name, User ID, Primary Email Address, Telephone Number, Roles, Enabled Roles, Services & Accounts, and Limits. The 'Limits' section shows 'Limits Completed' and 'Bill Pay'. The page also includes navigation links like 'Home', 'Reports', 'Money Movement', 'Account Services', and 'Administration'.

7. CONFIRMATION

The final screen will be the confirmation page and if a second approval is required for setting up new users it will show pending approval in the user status.

The screenshot shows the 'New User - Confirmation' page in the First Business Bank administration system. The page displays a confirmation message: "New user has been successfully created. Security settings may require additional approvals before this User ID is active. Review the user status linked below. To manage an existing user, complete a saved user, or create a new user, go to [User Administration](#)." Below the message is a 'Submitted User Summary' section showing the user information and the 'User Status' as 'Pending approval'. The page also includes navigation links like 'Home', 'Reports', 'Money Movement', 'Account Services', and 'Administration'.

The new user will now be able to access Online Business Banking following the "Logging In" instructions and using the user id and password that you just created.