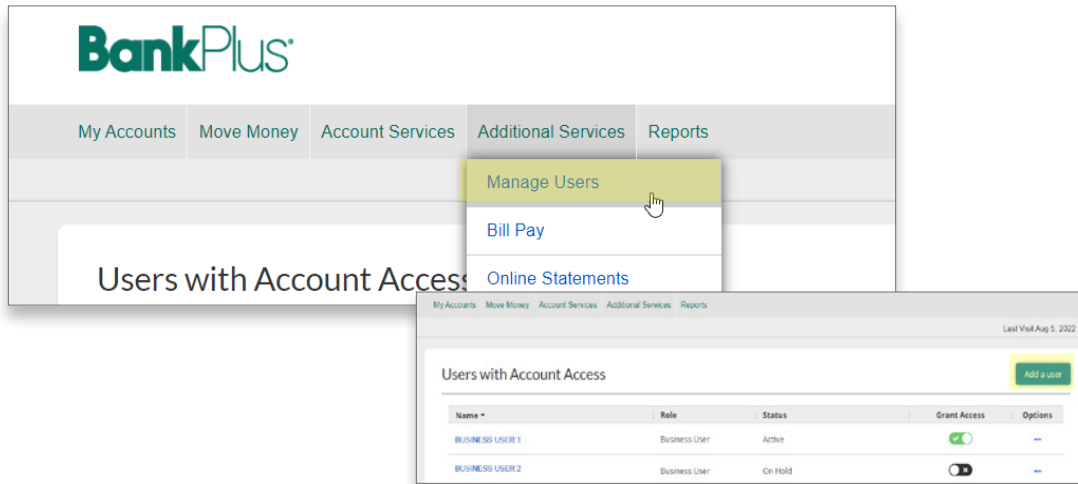


## ADDING SUB-USERS

To add sub-users to the new system, you will need to use the Manage Users feature located under the **Additional Services** menu.

- From the **Users with Account Access** screen, select the **+Add a user** button to access the **Manage User Details and Access Settings** screen.



## MANAGE USERS AND ACCESS SETTINGS

### USER DETAILS

Enter sub-user name, phone number and email address. The email address is used to send login instructions. The phone number that is entered will be used for multi-factor authentication. Please note that the phone number cannot contain an extension.

The image shows the 'User Details' form with the following fields:

- First Name
- Middle Name (Optional)
- Last Name
- Phone Number (format: (xxx) xxx-xxxx)
- Email

# MANAGE USERS AND ACCESS SETTINGS

## USER ACCESS SETTINGS | TAX ID OR ACCOUNT LEVEL ACCESS

In this section you can grant full or selective access to specific services within Business Online Banking . This can be done at the Tax ID or account level. To get started, from the dropdown box select the Tax ID that the accounts to which you will be granting access are under.

### 1. Granting Full Access for a Tax ID

- To grant full access to accounts under a specific Tax ID, click the drop-down menu to select the specific Tax ID for which you will be granting access.
- Select the **Grant full access for this Tax ID** box.

The screenshot shows the 'User Access Settings' interface. At the top right is a button 'Copy access from another user' with a dropdown arrow. Below is the section 'Modify account specific access' with the instruction 'Select a Tax ID and set access for each account'. A dropdown menu is set to 'BANKPLUS TEST ACCOUNTS 1 of 1'. To its right is a checkbox labeled 'Grant full access for this Tax ID'. Below this are two account entries: 'CAREFREE CHECKING - \*0105' with a balance of '\$2,840.60' and 'HIGH YIELD BUS MM - \*5556' with a balance of '\$0.00'. Each account has a 'Full Access Granted' checkbox.

### 3. Granting Full Access for a Specific Account

- After selecting the appropriate Tax ID, select the **Full Access Granted** box for the account you will be granting full access.

This screenshot shows the 'User Access Settings' interface with the 'CAREFREE CHECKING - \*0105' account selected. The 'Grant full access for this Tax ID' checkbox is checked. Below the account name and balance, there are five service categories, each with a 'Full Access Granted' checkbox: 'View Balances', 'View Transaction History / Statements', 'Internal Transfer', and 'Stop Payments'.

## 4. Granting Selective Access

- After selecting the appropriate **Tax ID**, click on the account you would like to grant access to expand the options.
- From here, select the box next to each item you to which would like to grant access.

The screenshot shows the 'User Access Settings' interface. At the top, there is a 'Copy access from another user' dropdown. Below this is the 'Modify account specific access' section, which prompts the user to 'Select a Tax ID and set access for each account'. A dropdown menu shows 'BANKPLUS TEST ACCOUNTS 1 of 1'. To the right, there is a checkbox for 'Grant full access for this Tax ID'. Below this, a table lists accounts and their associated features with checkboxes for granting access.

Account Name	Balance	Full Access Granted
CAREFREE CHECKING - *0105	\$2,840.60	<input type="checkbox"/>
View Balances		<input type="checkbox"/>
View Transaction History / Statements		<input type="checkbox"/>
Internal Transfer		<input type="checkbox"/>
Stop Payments		<input type="checkbox"/>

## MANAGE USERS AND ACCESS SETTINGS

### USER ACCESS SETTINGS | SET ACCESS FOR ALL ACCOUNTS

From the **Set access for all accounts** section, you will select features that sub-users can access across all accounts.

- To grant access to these features, select the box next to each item to which you would like to grant access.

The screenshot shows the 'Set access for all accounts' interface. It lists several features with checkboxes for granting access.

ACH File Import - Import Recipient Information	<input type="checkbox"/>
ACH File Import - Manage Import File Definitions	<input type="checkbox"/>
Bill Pay	<input type="checkbox"/>
Business Mobile App	<input type="checkbox"/>
Check Reorder	<input type="checkbox"/>
Online Statements	<input type="checkbox"/>
Remote Deposit	<input type="checkbox"/>

## MANAGE USERS AND ACCESS SETTINGS

### USER ACCESS SETTINGS | SET TRANSACTION LIMITS FOR ALL ACCOUNTS

In this section, company administrators can grant access to specific user-level functionality and transaction limits. The administrator is able to apply company limits or set transaction limits specifically for this user (equal to or lower than the company limits).

- **Apply Company Limits:** If you have preset Company Limits, simply select the **Apply Company Limits** option next to each of the limits where you want them applied.
- **Setting Transaction Limits:** Select the account for which you would like to set limits to expand the menu. Then enter the following limits: **Per Transaction, Per Day, Per Month**.

The screenshot shows a form titled "Set transaction limits for all accounts" with a help icon. It features a dropdown menu for "ACH Payments Creation Limits" which is currently expanded to show three options: "Per Transaction", "Per Day", and "Per Month". To the right of these options is a yellow panel with the heading "Apply Company Limits" and an unchecked checkbox. Below this heading are three input fields, each with a "Maximum" value: "\$100.00" for Per Transaction, "\$100.00" for Per Day, and "\$400.00" for Per Month.

## MANAGE USERS AND ACCESS SETTINGS

### USER ACCESS SETTINGS | SET APPROVAL THRESHOLDS FOR ALL ACCOUNTS

In this section, company administrators can grant access to specific user-level functionality and transaction thresholds. The administrator is able to apply company thresholds or set transaction thresholds specifically for this user (equal to or lower than the company threshold).

- **Apply Company Thresholds:** If you have preset Company Thresholds that you would like to apply to the user settings, simply select the **Apply Company Thresholds** option.
- **Setting Approval Thresholds:** Click **Transaction Approval Threshold** to expand the threshold fields and enter the following items: **ACH Payments Approval Threshold per Transaction, ACH Collections Approval Threshold per Transaction and ACH File Pass-Through Approval Threshold per File**.

The screenshot shows a form titled "Set approval thresholds for all accounts" with a help icon. It features a dropdown menu for "Transaction Approval Thresholds" which is currently expanded to show three options: "ACH Payments Approval Threshold per Transaction", "ACH Collections Approval Threshold per Transaction", and "ACH File Pass-Through Approval Threshold per File". To the right of these options is a yellow panel with the heading "Apply Company Thresholds" and an unchecked checkbox. Below this heading are three input fields, each with a "Maximum" value: "\$100.00" for ACH Payments, "\$100.00" for ACH Collections, and "\$100.00" for ACH File Pass-Through.

## MANAGE USERS AND ACCESS SETTINGS

### USER ACCESS SETTINGS | SET ACH TRANSACTION TYPES FOR ALL ACCOUNTS

- **Setting ACH Transaction Types:** Expand each section under the **Set ACH transaction types for all accounts** and select the allowed transaction types for both ACH Payment Type and ACH Collection Type.
- Once you have all permissions added, click **Save**.

