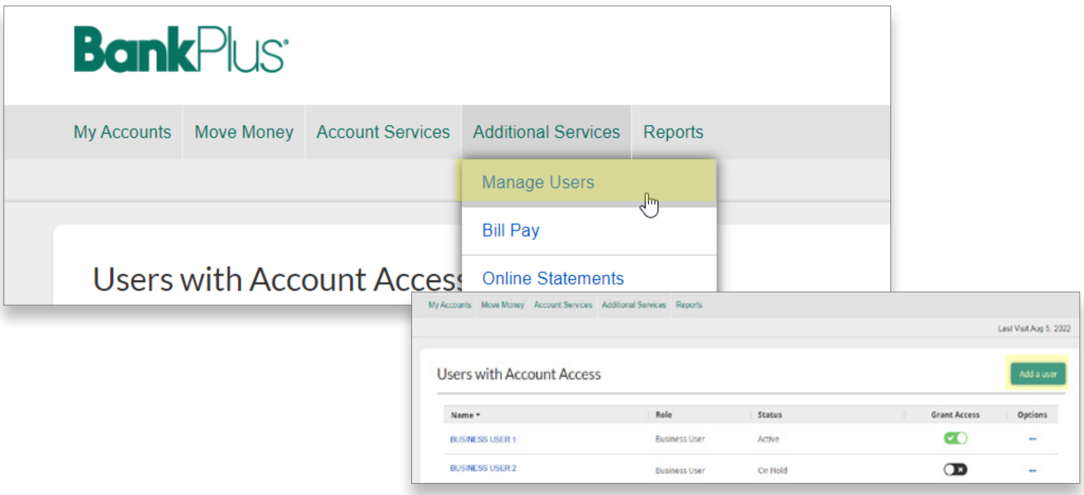
BankPlus

USER GUIDE

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.

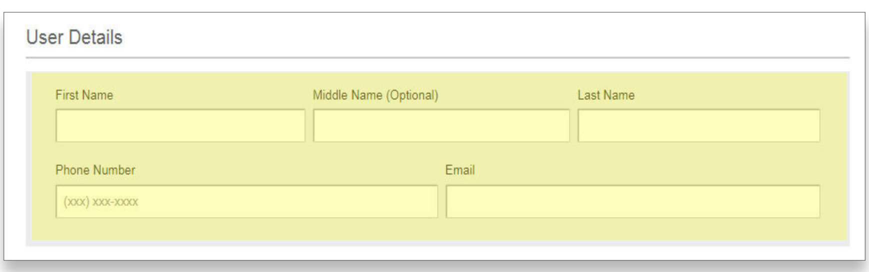
- From the ***Users with Account Access*** screen, select the ***+Add a user*** button to access the ***Manage User Details and Access Settings*** screen.



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.

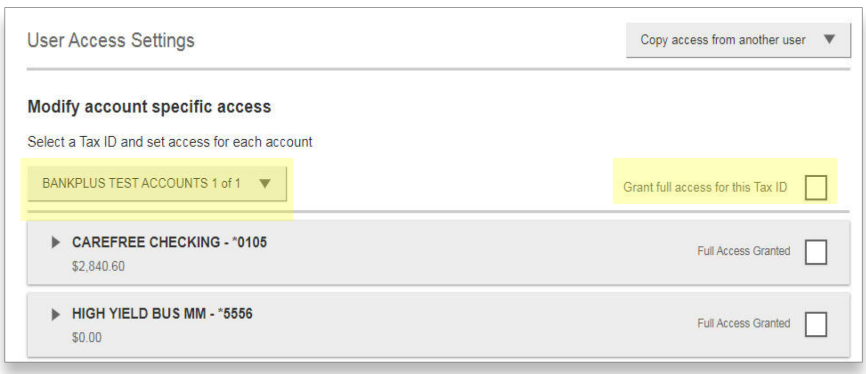


MANAGE USERS AND ACCESS SETTINGS
USER ACCESS SETTINGS | TAX ID OR ACCOUNT LEVEL ACCESS

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.

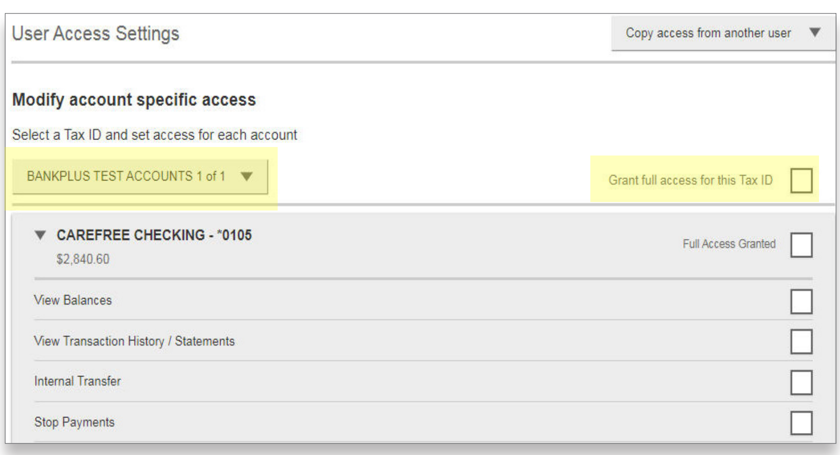
1. Granting Full Access for a Tax ID

- 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.



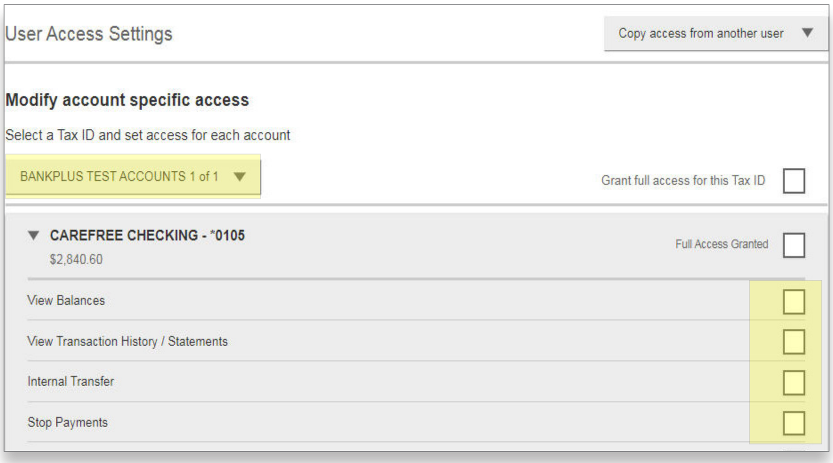
3. Granting Full Access for a Specific Account

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



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.

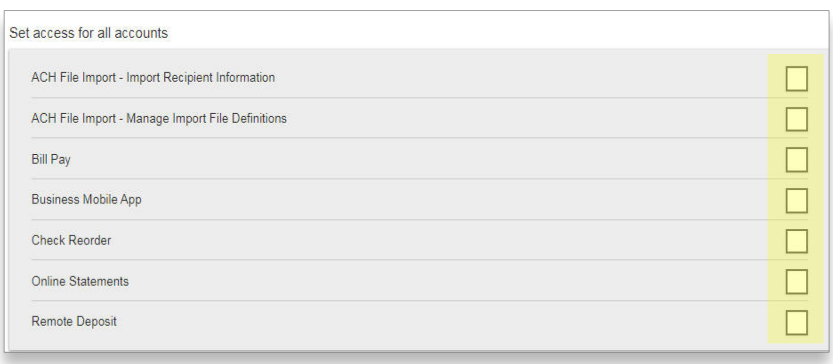


MANAGE USERS AND ACCESS SETTINGS

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.

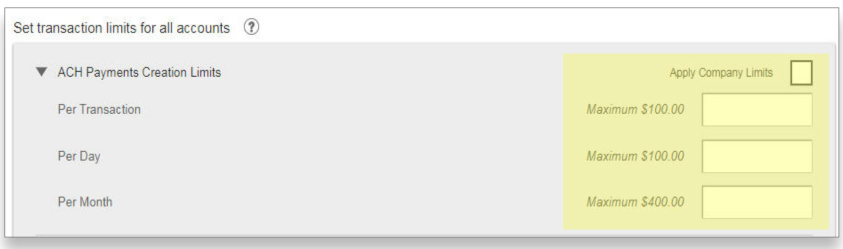
- To grant access to these features, select the box next to each item to which you would like to grant access.



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).

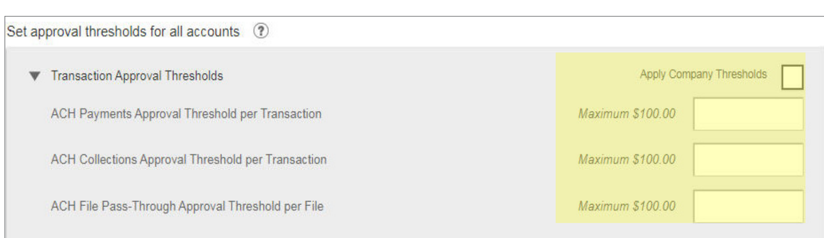
- **Apply Company Limits**: If you have preset Company Limits, simply select the **Apply Company Limits** option next to each of the limits where you want them applied.
- **Setting Transaction Limits**: Select the account for which you would like to set limits to expand the menu. Then enter the following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



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**.



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**.