Business banking: roles and sub-users

Follow these instructions to create new roles and sub-users in your business Online Banking. Each role that is created has customizable permissions for your business needs.

How to create a new role with permissions

1. Log in to Online Banking and click Manage Users.


3. Click on Add New Role.

4. Enter Role Name (e.g., Payroll Admin, Office Manager, Accountant, etc.).

5. Assign access for the role by marking the checkboxes next to the permissions you would like the role to have. These include:
   • Account access
   • View Statements and Documents
   • External Accounts
   • Transfers
   • Business ACH
   • Recipients
   • ACH Transaction Types
   • ACH Limits

6. Click Create Role.
Business banking: roles and sub-users (cont.)

How to set up a sub-user

1. Log in to Online Banking and click Manage Users.

2. Click Add a New User.

3. In the “New User” window:
   • Enter user’s First Name
   • Enter user’s Last Name
   • Enter user’s Title
   • Enter user’s Phone Numbers (optional)
   • Enter user’s Email Address
   • Create a Username

   Note: Usernames will need to be verbally shared with the new sub-user for security reasons.

4. Click Next.

5. Select the previously created role from the “Role” dropdown menu, and click Next.
Business banking: roles and sub-users (cont.)

6. Click **Confirm**.
   
   **Note:** A temporary password will be sent to the sub-user’s email address and will expire within 24 hours. The temporary password will need to be entered in the "Old Password" field when the sub-user is creating their new password.