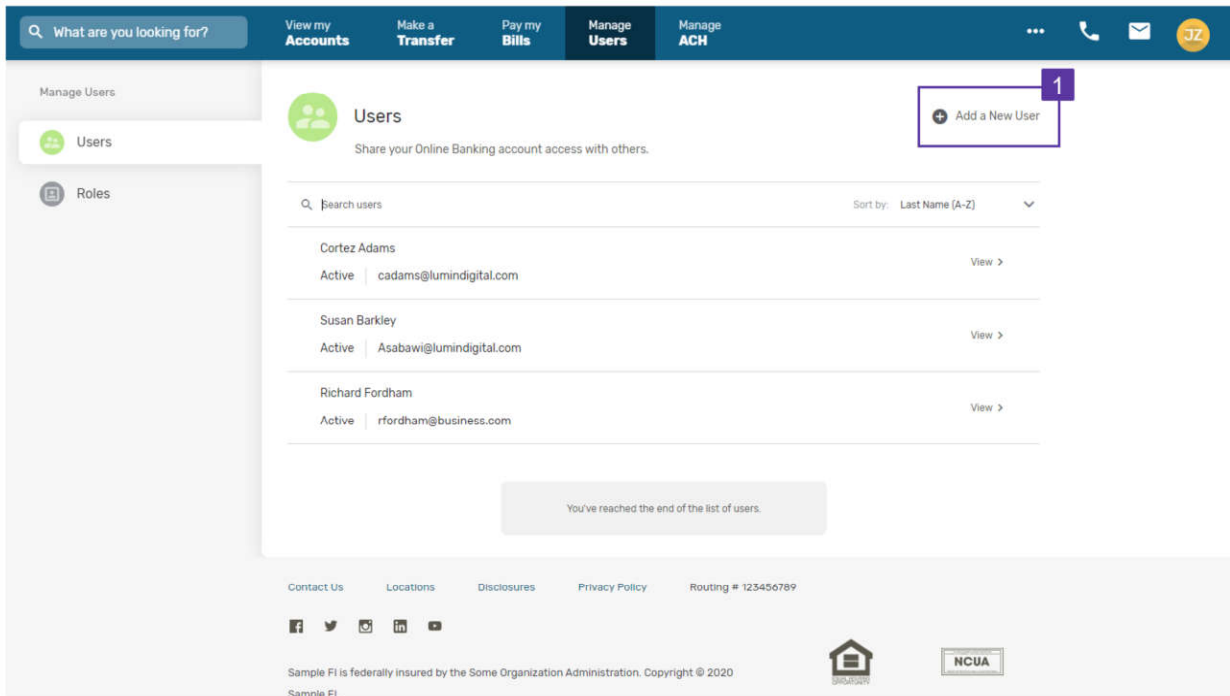


Add a New User

Your business account owners may wish to add additional users to their online banking, such as their accounting department or payroll, to manage payroll transfers, pay bills, and handle other business needs. The roles assigned to each user determine the accounts they can see and the activities they can transact on an account.

To add a new user:

1. Access the **Manage Users** tab and click **Add a New User**.



Step One: Details

2. Enter the user's **First Name**, **Last Name**, **Email**, and **Username**.
 - a. The remaining fields are optional.
3. Click the **Next** button.

Manage Users

Users

Roles

← Back to Users

New User

1 Details 2 Role 3 Review

First Name Penny Last Name Money

Title (optional) Payroll Specialist Home Phone (optional)

Mobile Phone (optional) Work Phone (optional)

Email pmoney@email.com Username PennMone

Next

Step Two: Role

4. Select a **Role** from the drop-down menu.
5. Click the **Next** button.

Manage Users

Users

Roles

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New User

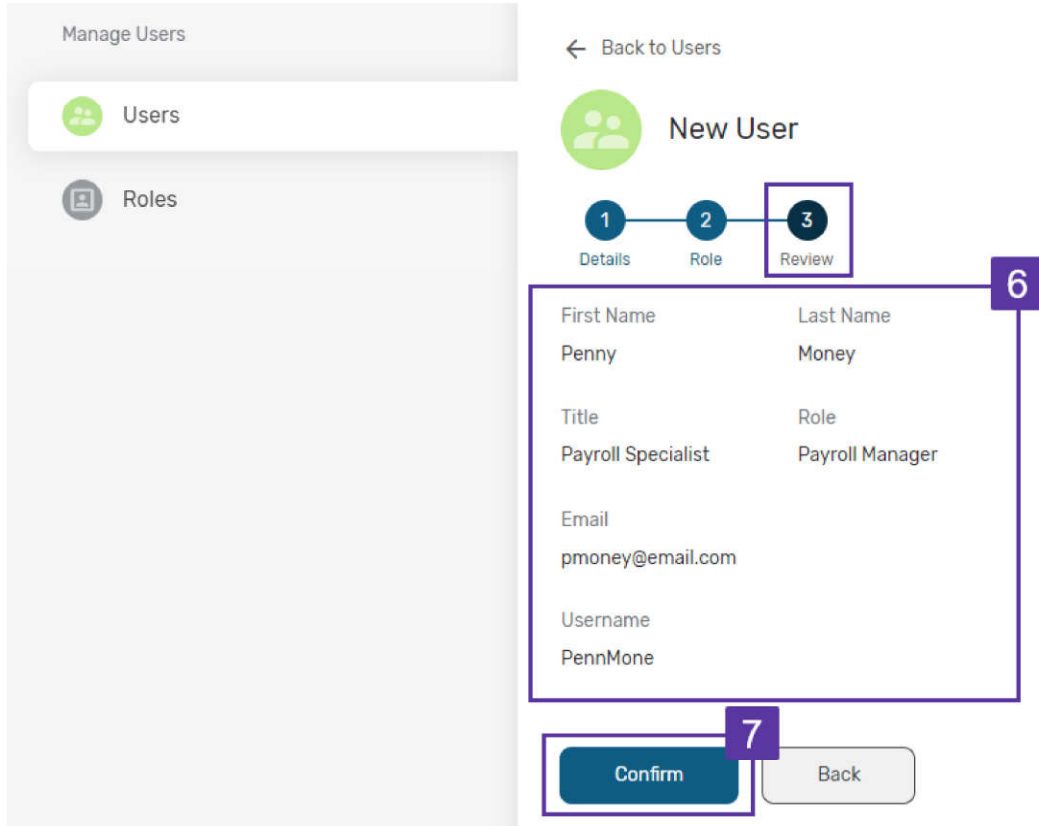
1 Details 2 Role 3 Review

Role Payroll Manager

Next Back

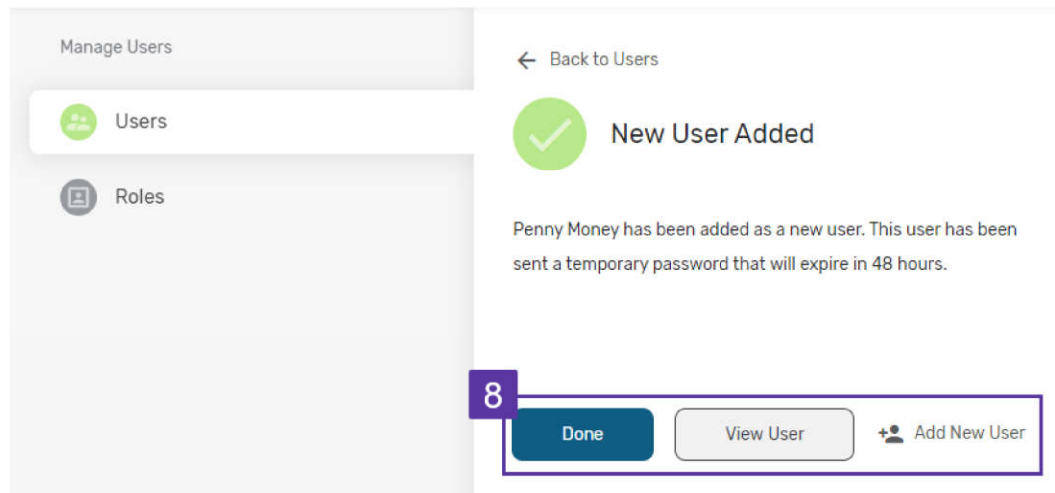
Step Three: Review

6. Review the new user's information for accuracy.
7. Click the **Confirm** button.



New User Added

8. Complete one of the following actions:
 - Click **Done** to return to the **Users** page.
 - Click **View User** to look at the new user's details.
 - Click **Add New User** to add additional users.



The new user now appears on the **Users** list.

