

New User Set-Up



Log in to Business Online Banking and select **Administration > Company Administration > Create New User**

The screenshot shows the Choice Bank Business Online Banking interface. The top navigation bar includes links for Welcome, Reports, Money Movement, Account Services, and Administration. The Administration menu is expanded, showing options like Communications, Company Administration, Self Administration, Service Administration, and Manage mobile banking settings. The Company Administration menu item is highlighted. Below the navigation bar, the main content area is titled 'Company Administration' and includes tabs for Manage Users, Account Information, Express Account Management, Approval Settings, and User Administration. The 'New User' section is active, displaying a 'Create New User' button.

*On each set up page, click on "Got Questions? We can Help" at the bottom of the screen for additional resources.

Got Questions? We can help +

Complete a New User – Profile

The screenshot shows the 'New User' profile creation form. The form includes fields for User Information, Password, Confirm Password, First Name, Last Name, Primary E-mail Address, Secondary E-mail Address (Optional), and Additional Information (Optional). A tooltip is displayed on the right side of the form, providing password requirements:

- Must be 8 to 12 characters long.
- Password must contain at least 1 letter and 1 number.
- Cannot include spaces
- Cannot include a character that repeats more than 3 times
- Is case sensitive
- May include special characters: ! @ # \$ % ^ & * (_ + = | / ? ; : . } { - []



Recommendations

- User Telephone Number
 - Using a mobile number allows for text code verification for login (message and data rates may apply).
 - Include extension for business phone number when it is not a direct dial number.

User Telephone Number

The telephone number used to contact or notify the user for security reasons. An extension is required when needed to reach the user within an office phone system.

Label	Country/Region	Area/City Code & Number	Extension
<input type="text" value="Label Mobile"/>	<input type="text" value="Country/Region UNITED STATES"/>	<input type="text" value="Area/City Code & Number 6129999999"/>	<input type="text" value="Extension"/>
<input type="text" value="Label Work"/>	<input type="text" value="Country/Region UNITED STATES"/>	<input type="text" value="Area/City Code & Number 7639999999"/>	<input type="text" value="Extension"/>

[+ Add additional telephone number](#)

Complete New User – Roles

There are 3 options for User Roles.

- If you want your User to be able to setup a template, without any further approval, assign him/her the **Setup** and **Approver** roles.
 - *Allow this user to setup templates.*
 - *Allow this user to approve transactions.*
- If you want your User to have the ability to set up Users, delete or maintain Users, entitle services, and establish limits, they should be assigned the **Administration** role.
 - *Grant this user administration privileges.*
- If you want your User to have View-only access, you do not need to assign them a role.

Company Administration

Manage Users | Account Information | Express Account Management | Approval Settings | User Setup Report | Invalid

New User

Profile

Name:

Jane Doe

User ID:

JaneDoe

Primary E-mail Address:

janedoe@easystreet.com

Telephone Number:

Work: +1 (763) 999-9999

Roles

Copy Existing User (Optional)

☒ Do not copy user.

☐ Copy User: [Select User](#)

User Roles (Optional)

☐ Allow user to setup templates.
(This entitles the user to template setup and template approval capabilities for only those services and accounts to which the user has been entitled.)

☐ Allow this user to approve transactions
(This entitles the user to transmit capabilities for only those services and accounts to which the user has been entitled.)

☐ Grant this user administration privileges
(This will allow the user to add, modify, copy and delete users, modify their roles, services and account access, rename accounts, and modify the number of approvers required for requests.)




Complete New User – Services & Accounts


To enable a service, click on the  icon to the right of the service.

- Some services may have additional selections when used, such as eStatements, Internal Transfers, and Mobile RDC.
- Options include:
 - *Entitled Account- Provides access to account, setting up ACH/Wire/Internal transfers.*
 - *Allow Transmit- Allows user to release (transmit) the ACH/Wire/Internal transfer.*
 - *For view-only customers, you need to enable Deposit Reports, Information Reporting, and eStatements for each account they need access to see.*

New User

Profile 

Name: Jane Doe
User ID: JaneDoe
Primary E-mail Address: janedoe@easystreet.com
Telephone Number: Mobile: +1 (612) 999-9999 Work: +1 (763) 999-9999




Roles 

Enabled Roles: None assigned


Services & Accounts (Optional)

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

0 of 36 services enabled [Clear All](#)

Service	
ACH File Upload	
ACH Positive Pay	
Bill Pay	


To grant access to an Account(s), select the "Entitled Account" box, next to each Account.

✓ **Bill Pay** Service enabled, accounts entitled. 

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	Entitled Account
Easy Street Operating	12121212	091302966	<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>

To allow a user to transfer funds, select the "Allow Transmit" box, next to each account.

✓ **Wire Domestic One Time** Service enabled, accounts entitled. 

Description	Account Number	TRC	Entitled Account	Allow Transmit
Easy Street Operating	12121212	091302966	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Note: Users must have the **Setup** and **Approver** roles for the "Allow Transmit" box to appear for selection. Only services & accounts listed on your Company's **Cash Management Services Agreement Addenda B** will be available for you to select and assign to Users.



Complete New User – Limits

User Daily Limits are not to exceed limits established in the Cash Management Services Agreement Addenda B.

You will see limit options, based on the services that you have selected. To edit the user limits, click on the “edit” link.

Limits

Limits

Wire

Enter daily limit for the user or keep default of “No Limit”. Limits must not exceed company limit set by the bank. To view company limits, simply click on the link “View Company Limits”.

Limit for all wire services:

Limits

Limits

Wire

Daily Maximum Limit

Enter the maximum daily amount allowed for the sum of all the user's Wire transactions. The limit must be no greater than the company limit set by the bank [View Company Limits](#).

\$1.00 USD

Limit for specific wire services:

Daily Maximum Service Limits

Enter the maximum daily amount for each of the user's Wire services or select the No Limit checkbox. These limits must be no greater than the company limit set by the bank. [View Company Limits](#)

Service Name	No Limit	User Daily Service Limit
Wire Domestic One Time	<input checked="" type="checkbox"/>	
Wire FX Intl One Time	<input checked="" type="checkbox"/>	

Limit wire services per account:

Account Limits

Enter the limit amounts for each of the user's accounts.

Account Number	No Limit	User Daily Account Limit
*1212 - Easy Street Operating		\$1.00 USD



Review New User – Verification

You can now review your new User setup and make any changes, prior to submitting.

Company Administration

Manage UsersAccount InformationExpress Account Management

New User

Profile

Name:Jane Doe
User ID:JaneDoe
Primary E-mail Address:janedoe@easystreet.com
Telephone Number:Mobile: +1 (612) 999-9999
Work: +1 (763) 999-9999

Roles

Enabled Roles:Setup
Approval

Services & Accounts

Enabled Services:3 of 36 available

Limits

Limits Completed:Wire

Create User

Save as Draft

New User – Confirmation

New User - Confirmation

New user has been successfully created.

Security settings may require additional approvals before this User ID is active. Review the user status listed below. To manage an existing user, complete a saved user, or create a new user, go to [User Administration](#).

Submitted User Summary

Name:Jane Doe
User ID:JANEDOE
Primary E-mail Address:janedoe@easystreet.com
Telephone Number:Mobile: +1 (612) 999-9999
Work: +1 (763) 999-9999

User Status

User Status:Active

Questions & Contact Information

If you have any questions regarding adding Users,
please contact your Account Manager or the Cash Management Team

Phone 763.210.7775

Email cmteam@bankwithchoice.com