

How to Create a User with View Only Access



Learn how to manage your business banking team by adding new authorized users to your company account. This guide simplifies the user creation process to help you quickly grant access to your financial dashboard. This access would be for view only access.

Administration Access

1 Login to your online banking platform.

The screenshot displays the online banking platform interface. A navigation menu is open, showing options: Communications, Company Administration, Self Administration, Service Administration, and Manage Mobile Banking Settings. The main content area shows account balances as of 05/27/2026. A table lists accounts with their available balances. A 'Decision Decisions' section is visible with radio buttons for 'All decisions' and 'My decisions'. A message at the bottom states 'There are no exceptions waiting for approval'. The right sidebar contains sections for 'Alerts and Messages', 'Saved Reports', and 'Cash Management Resources'.

Account Name	Available Balance
ABC Company LLC MM Savings	\$2.02
Test	\$0.02
ABC LLC Business Checking	\$1.27
Jack Customer Business Account	\$0.00
Total Selected Checking Balance	\$3.31
Total of Selected Deposit Accounts	\$3.31

2 Click "Company Administration"

The screenshot shows the CHOICE BANK Administration page. The 'Administration' menu is open, and 'Company Administration' is highlighted with an orange circle. The page header includes 'CHOICE BANK', navigation links (Welcome, Reports, Money Movement, Account Services, Administration), and user information (Hi, Cally | Sign Out, Last Login: May 15, 2026, 4:05:30 PM). The main content area displays account balances for various accounts, including ABC Company LLC MM Savings, Test, ABC LLC Business Checking, and Jack Customer Business Account. A 'Company Administration' dropdown menu is visible, listing options: Communications, Company Administration (highlighted), Self Administration, Service Administration, and Manage Mobile Banking Settings. The right sidebar contains 'Alerts and Messages', 'Saved Reports', and 'Cash Management Resources'.

User Profile Creation

3 Click "Create New User"

The screenshot shows the CHOICE BANK Company Administration page. The 'Company Administration' menu is open, and 'Create New User' is highlighted with an orange circle. The page header includes 'CHOICE BANK', navigation links (Welcome, Reports, Money Movement, Account Services, Administration), and user information (Hi, Cally | Sign Out, Last Login: M...). The main content area displays 'Company Administration' with tabs for Manage Users, Account Information, Account Administration, Approval Settings, User Setup Report, Invalid Login Report, Threat Response Report, and ACH File SEC Code. The 'User Administration' section includes a 'New User' button, which is highlighted with an orange circle. Below the 'New User' button, there is a table of existing users with columns for User ID, First Name, Last Name, Status, and System Access.

User ID	First Name	Last Name	Status	System Access
AEBENSTEINER			Active	System Access
AYOULE			Active	System Access
BLINGEN			Inactive	System Access
CMURPHY			Active	System Access
CSATTER			Inactive	System Access
DAFNEG6459			Inactive	System Access

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Complete the User Information and User Telephone Number sections.

CHOICE BANK Welcome Reports Money Movement Account Services Administration Hi, Ca Last Login: M

Approvals (

Company Administration

Manage Users Account Information Account Administration Approval Settings User Setup Report Invalid Login Report Threat Response Report ACH File SEC Cod

New User

User Information

User ID Please enter User ID

Password

Confirm Password

First Name

Last Name

Primary E-mail Address

Secondary E-mail Address (Optional)

Additional Information (Optional)

Address (Optional)

ation (Optional)

Number

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.

Country/Region	Area/City Code & Number	Extension
<input type="text"/>	<input type="text"/>	<input type="text"/>

al telephone number

[Save as Draft](#)

[Privacy](#) [Questions? We can help!](#) +

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Click "Continue" to save user information and proceed to user roles.

First Name

Last Name
Customer

Primary E-mail Address

Secondary E-mail Address (Optional)

Additional Information (Optional)

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
Label Work	Country/Region	Area/City Code & Number 7013569700	Extension

+ Add additional telephone number

Continue Save as Draft

[Disclosure](#) | [Privacy](#)

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Service and Role Configuration

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Select desired User Roles, such as template setup permissions, and click "Continue".

NEW USER

Profile

Name: Jack Customer
User ID: jcustomer
Primary E-mail Address: [redacted]
Telephone Number: [redacted] Work: [redacted]

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.)

Continue Save as Draft

Questions? We can help

NEW USER

Profile

Name: Jack Customer
User ID: jcustomer
Primary E-mail Address: [REDACTED]
Telephone Number: [REDACTED]
Work: [REDACTED]

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.)

Continue

Save as Draft

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BANK

Welcome Reports Money Movement Account Services Administration

Last Login: May 15, 2026, 4:05:37 PM ET

	Approvals	Exceptions
Positive Pay	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ay	<input type="checkbox"/>	<input type="checkbox"/>
Collection	<input type="checkbox"/>	<input type="checkbox"/>
Payment	<input type="checkbox"/>	<input type="checkbox"/>
Collection	<input type="checkbox"/>	<input type="checkbox"/>
Payment	<input type="checkbox"/>	<input type="checkbox"/>
sit Account Reporting	<input type="checkbox"/>	<input checked="" type="checkbox"/>
sit Reports	<input type="checkbox"/>	<input type="checkbox"/>
ements IMPORTANT: The eStatement User ID must be a unique value, therefore please enter the values for Company ID and User ID, separated by a hyphen without spaces (i.e. 567-JRSMITH).	<input type="checkbox"/>	<input type="checkbox"/>
ownload	<input type="checkbox"/>	<input type="checkbox"/>
e Search	<input type="checkbox"/>	<input type="checkbox"/>
ning Wire Report	<input type="checkbox"/>	<input type="checkbox"/>
nation Reporting	<input type="checkbox"/>	<input type="checkbox"/>
ial Transfer	<input type="checkbox"/>	<input type="checkbox"/>

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Enable required reporting services and configure specific account entitlements for eStatements.

Positive Pay		+
ay		+
Collection		+
Payment		+
Collection		+
Payment		+
sit Account Reporting	Service enabled, accounts not applicable.	⊗
sit Reports		+
ements	IMPORTANT: The eStatement User ID must be a unique value, therefore please enter the values for Company ID and User ID, separated by a hyphen without spaces (i.e. 567-JRSMITH).	+
ownload		+
e Search		+
ning Wire Report		+
nation Reporting		+
ial Transfer		+
tment Reporting		+



ay		+
Collection		+
Payment		+
Collection		+
Payment		+
sit Account Reporting	Service enabled, accounts not applicable.	⊗
sit Reports	Service enabled, accounts not applicable.	⊗
ements	IMPORTANT: The eStatement User ID must be a unique value, therefore please enter the values for Company ID and User ID, separated by a hyphen without spaces (i.e. 567-JRSMITH).	+
ownload		+
e Search		+
ning Wire Report		+
nation Reporting		+
ial Transfer		+
tment Reporting		+



Questions? We can help! +

- Payment ⊕
- Collection ⊕
- Payment ⊕
- Bit Account Reporting Service enabled, accounts not applicable. ⊗
- Bit Reports Service enabled, accounts not applicable. ⊗
- Statements Service accounts ⊗

IMPORTANT: The eStatement User ID must be a unique value, therefore please enter the values for Company ID and User ID, separated by a hyphen without spaces (i.e. 1234567-JRSMITH).
 The user to this eStatements user ID:

Description	Account Number	TRC	Enrolled Account
Company LLC MM Savings	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Company XXX3630 CD	9000033630	091302966	<input type="checkbox"/>
LLC Business Checking	220036701	091302966	<input type="checkbox"/>
Customer Business Account	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Customer Line of Credit	1212121212	091302966	<input type="checkbox"/>

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			Approvals	Exceptions
Customer Line of Credit	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ings	10001022	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
:	001212121212	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

^ Collapse

- Download ⊕
- e Search ⊕
- ning Wire Report ⊕
- mation Reporting ⊕
- ial Transfer ⊕
- tment Reporting ⊕
-
- Advance ⊕
- Payment ⊕
- hox Central ⊕

Collection				+
Payment				+
Bit Account Reporting		Service enabled, accounts not applicable.		⊗
Bit Reports		Service enabled, accounts not applicable.		⊗
Statements	IMPORTANT: The eStatement User ID must be a unique value, therefore please enter the values for Company ID and User ID, separated by a space without spaces (i.e. 1234567-JRSMITH).	Service enabled, accounts not applicable.		⊗
Download				+
File Search		Service enabled.		⊗

Description	Account Number	TRC	Entitled Account
Company LLC MM Savings		091302966	<input type="checkbox"/>
Company LLC Business Checking	220036701	091302966	<input type="checkbox"/>
Customer Business Account			<input type="checkbox"/>
Accounts	10001022	091302966	<input type="checkbox"/>
	001212121212	091302966	<input type="checkbox"/>

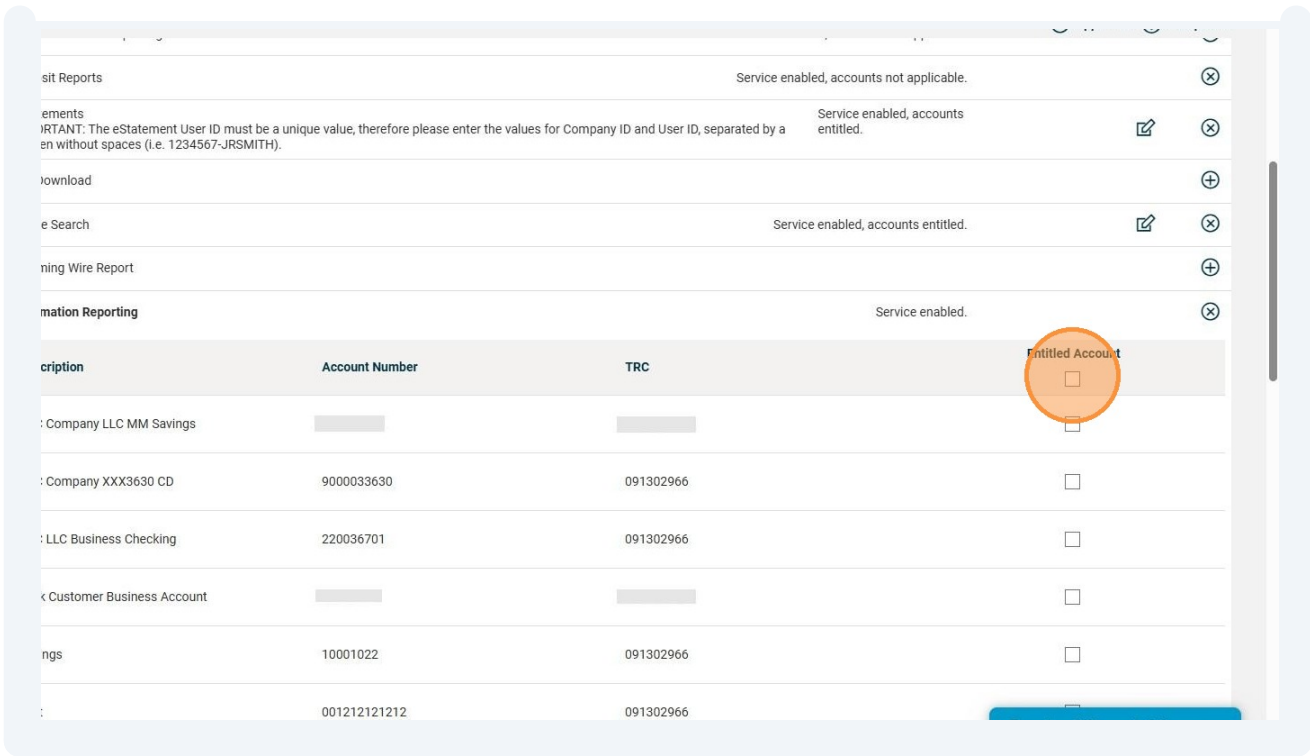
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Last Login: May 15, 2026, 4:05:37 PM ET

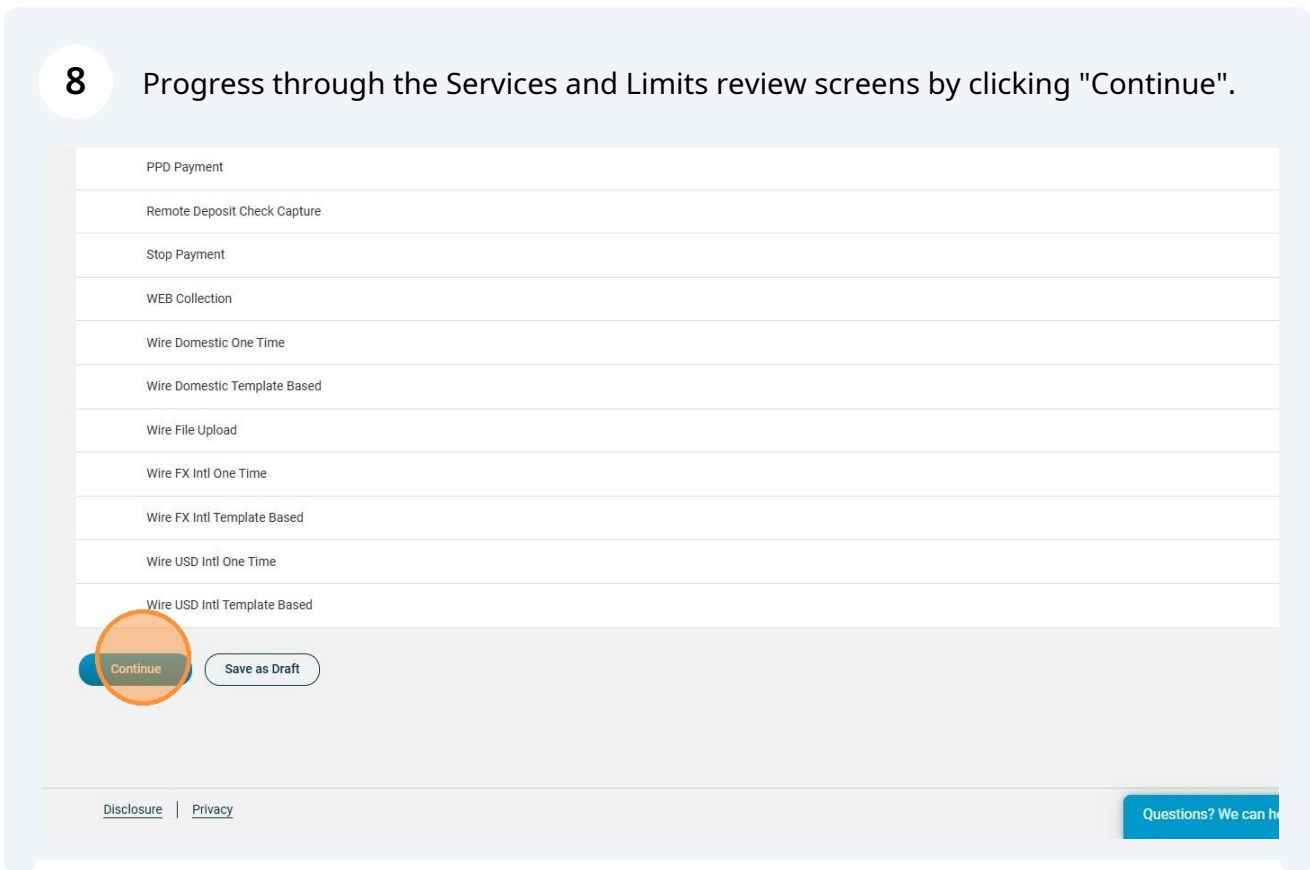
			Approvals	Exceptions
Accounts	10001022		<input checked="" type="checkbox"/>	
	001212121212		<input checked="" type="checkbox"/>	

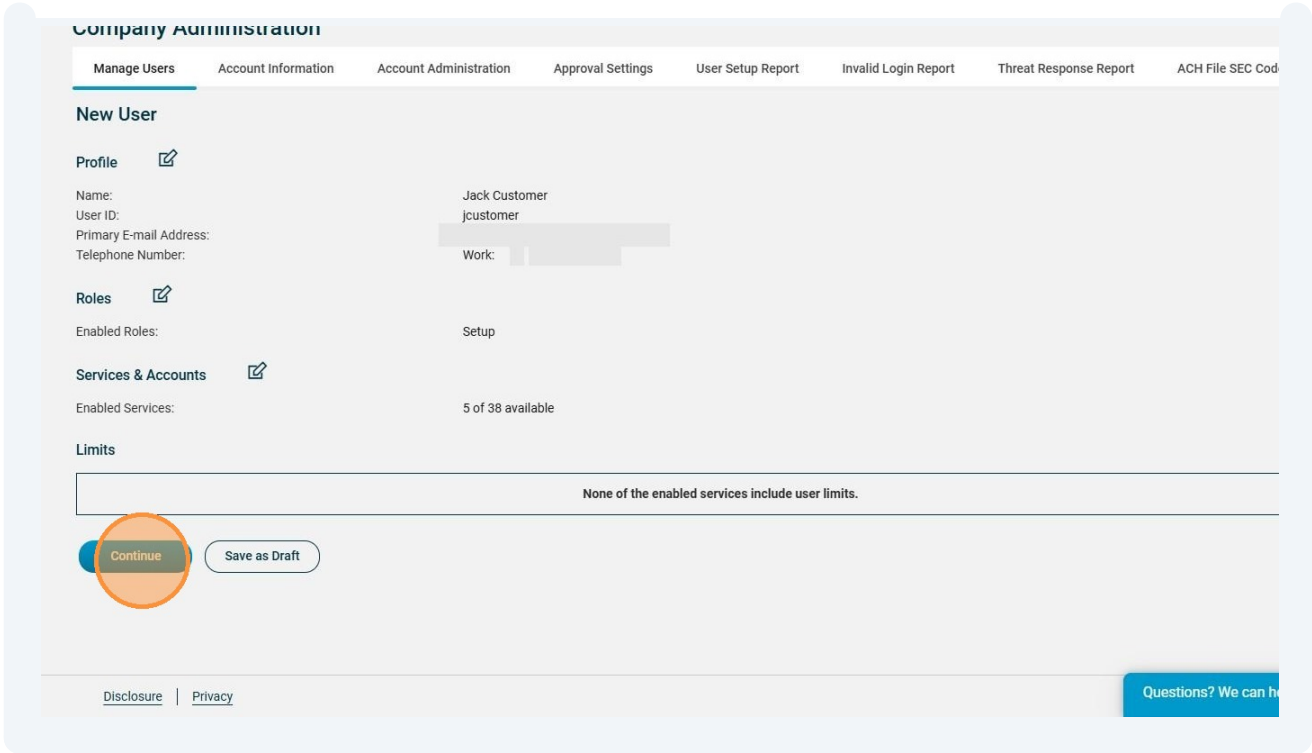
^ Collapse

Accounting Wire Report			+
Information Reporting			+
Internal Transfer			+
Investment Reporting			+
			+
Advance			+
Payment			+
Box Central			+
Mobile Banking			+
Wire			+



8 Progress through the Services and Limits review screens by clicking "Continue".





Final Review

9 Click "Create User"

