

# How to Create a New User in Online Banking



1 Navigate to the Administration tab.

The screenshot displays the CHOICE BANK online banking interface. The top navigation bar includes links for Welcome, Reports, Money Movement, Account Services, and Administration. The Administration tab is selected, and a dropdown menu is open, showing options: Communications, Company Administration (highlighted), Self Administration, Service Administration, and Manage Mobile Banking Settings. The main content area is divided into two sections: Accounts Summary and Exception Decisions. The Accounts Summary section shows a table of account balances as of 02/14/2025, including ABC Company LLC MM Savings, ABC LLC Business Checking, Jack Customer Business Account, and Test. The Exception Decisions section shows a table of exceptions waiting for approval, with a message stating "There are no exceptions waiting for approval".

**CHOICE BANK** | Welcome | Reports | Money Movement | Account Services | **Administration** | Hi, Cally | Last Login: Feb 13, 2025

**Accounts Summary**

Checking | Savings | CertificateOfDeposit | Loan

Balances as of 02/14/2025

ABC Company LLC MM Savings ABA/TRC 2968	Available Balance	\$6.01
ABC LLC Business Checking ABA/TRC 6701	Available Balance	\$1.27
Jack Customer Business Account ABA/TRC 7903	Available Balance	\$90.08
Test ABA/TRC 1212	Available Balance	\$0.00
Total Selected Checking Balance		\$0.00
Total of Selected Deposit Accounts		\$0.00

**Exception Decisions**

ACH Positive Pay | Check

All decisions | My decisions

There are no exceptions waiting for approval

**Alerts and Message**

Password Changed  
02/07/2025 11:57:32 AM (ET)  
[View All](#)

**Saved Reports**

Intraday Report

Previous Business Day R

**Cash Manager**  
Resource  
User Guides, How-To  
Instructional Videos  
[Take Me There](#)

**Taking Care of Business**  
Tips, News, Webinars  
[More Info](#)

## 2 Click "Company Administration"

The screenshot shows the CHOICE BANK Administration menu. The 'Company Administration' option is highlighted with an orange circle. The menu also includes Communications, Self Administration, Service Administration, and Manage Mobile Banking Settings. The background shows the Accounts Summary page with a table of account balances as of 02/14/2025.

Account Name	Available Balance
ABC Company LLC MM Savings	\$6.01
ABC LLC Business Checking	\$1.27
Jack Customer Business Account	\$90.08
Test	\$0.00
Total Selected Checking Balance	\$0.00
Total of Selected Deposit Accounts	\$0.00

## 3 Click "Create New User"

The screenshot shows the CHOICE BANK Company Administration page. The 'Create New User' button is highlighted with an orange circle. The page includes sections for User Administration, New User, and Manage Existing Users. A table lists existing users with their IDs, names, and statuses.

User ID	First Name	Last Name	Status
AEBENSTEINER			Active
BEBPREVIEW	BeB	Preview	Active
BJOHNSON123		TEST	Active
BLINGEN			Active
CMURPHY			Active
CSATTER			Active

## 4 Walk through filling out the user information.

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

Approvals (

### Company Administration

Manage Users Account Information Account Administration Approval Settings User Setup Report Invalid Login Report ACH File SEC Codes

#### New User

##### User Information

User ID

Password

Confirm Password

First Name

Last Name

Primary E-mail Address

Secondary E-mail Address (Optional)

Additional Information (Optional)

##### User Telephone Number

## 5 Click "Continue"

Password

Confirm Password

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 7632107775	Extension

+ Add additional telephone number

Continue Save as Draft

Questions? We can h

## 6 Select user roles.

### Company Administration

Manage Users Account Information Account Administration Approval Settings User Setup Report Invalid Login Report ACH File SEC Codes

#### New User

##### Profile

Name: Jack Customer  
User ID: jcustomer  
Primary E-mail Address:   
Telephone Number: Work: +1 (763) 210-7775

##### 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

## 7 Click "Continue"

### Company Administration

Manage Users Account Information Account Administration Approval Settings User Setup Report Invalid Login Report ACH File SEC Codes

#### New User

##### Profile

Name: Jack Customer  
User ID: jcustomer  
Primary E-mail Address:   
Telephone Number: Work: +1 (763) 210-7775

##### 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

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Add in any services you want them to have access to.

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

ces enabled

[Clear All](#)

#### Service

ACH File Upload	
ACH Positive Pay	
Bill Pay	
CCD Collection	
CCD Payment	
CTX Collection	
CTX Payment	
Deposit Account Reporting	
eStatements	
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).	
File Download	
Image Search	
Incoming Wire Report	
Information Reporting	

Questions? We can help!



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Click "Continue"

PPD Payment

Remote Deposit Check Capture

Stop Payment

WEB Collection

Wire Domestic One Time

Wire Domestic Template Based

Wire File Upload

Wire FX Intl One Time

Wire FX Intl Template Based

Wire USD Intl One Time

Wire USD Intl Template Based

Continue

Save as Draft

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Questions? We can help!

## 10 Click "Continue"


Company Administration

Manage Users Account Information Account Administration Approval Settings User Setup Report Invalid Login Report ACH File SEC Codes


### New User

**Profile** 

Name: Jack Customer  
User ID: jcustomer  
Primary E-mail Address:   
Telephone Number:  Work: +1 (763) 210-7775

**Roles** 

Enabled Roles: Setup  
Approval

**Services & Accounts** 

Enabled Services: 2 of 36 available

**Limits**

None of the enabled services include user limits.

**Continue** Save as Draft


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## 11 Click "Create User", you will need to provide the user with their login information.


Company Administration

Manage Users Account Information Account Administration Approval Settings User Setup Report Invalid Login Report ACH File SEC Codes


### New User

**Profile** 


Name: Jack Customer  
User ID: jcustomer  
Primary E-mail Address:   
Telephone Number:  Work: +1 (763) 210-7775

**Roles** 

Enabled Roles: Setup  
Approval

**Services & Accounts** 

Enabled Services: 2 of 36 available

**Limits** 

Limits Completed: None of the enabled services include user limits.

**Create User** Save as Draft

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