## **How to Create a New User in Online Banking**

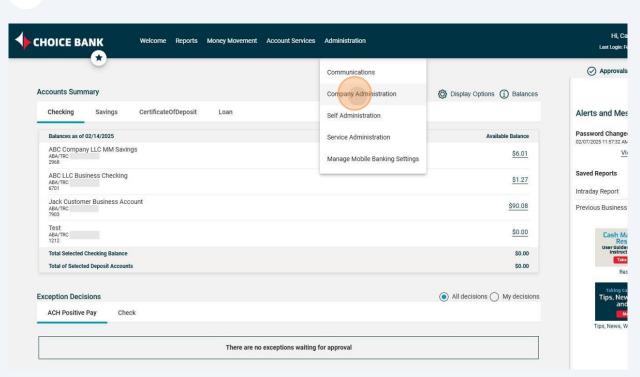
ACH Positive Pay Check



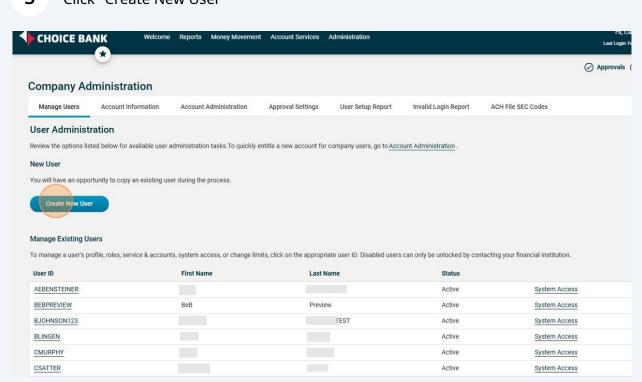
1 Navigate to the Administration tab. Hi, Cally | Welcome Reports Money Movement Account Services Administration **CHOICE BANK** Last Login: Feb 13, 20 Approvals ( Communications Accounts Summary Company Administration Display Options (i) Balances Checking Savings CertificateOfDeposit Alerts and Message Self Administration Available Balance Balances as of 02/14/2025 ABC Company LLC MM Savings ABA/TRC 2968 View All \$6.01 Manage Mobile Banking Settings ABC LLC Business Checking ABA/TRC 6701 Saved Reports \$1.27 Intraday Report Jack Customer Business Account ABA/TRC 7903 \$90.08 Previous Business Day Re \$0.00 Total Selected Checking Balance Total of Selected Deposit Accounts \$0.00 All decisions My decisions Exception Decisions

There are no exceptions waiting for approval

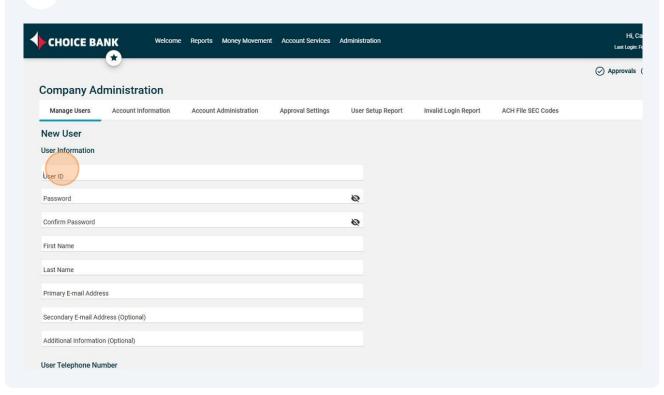
## 2 Click "Company Administration"

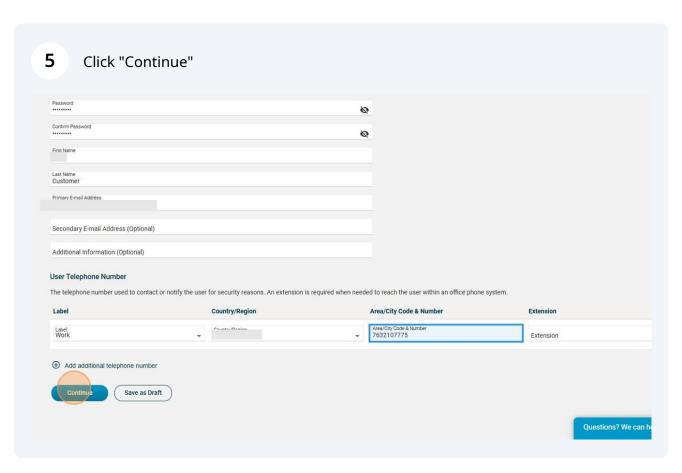


3 Click "Create New User"



Walk through filling out the user information.





## 6 Select user roles. company / tanimica auton Manage Users Account Information Account Administration Approval Settings User Setup Report Invalid Login Report ACH File SEC Codes New User Profile 🗹 Name: jcustomer Jack Customer User ID: Primary E-mail Address: Work: +1 (763) 210-7775 Telephone Number: Copy Existing User (Optional) Do not copy user. Opy 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 entitiled.) 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

