

Primary Admin & User Setup Guide

Use this guide to log in, manage users, assign roles, and control access in your upgraded Business Digital Banking experience.

First-Time Login (Primary Administrator)

1. The **Primary Administrator must log-in first**
2. Enter your current **Username and Password**
3. Follow the prompt to **create a new password**

Not sure who your Primary Administrator is? Contact us and we'll help.

Login

Username
Test1234

Password


Remember Username

Log In

[Forgot your username or password?](#)

[Or, Register with Online Banking](#)

Manage Users

 Users

Set Up Users

1. Go to **Manage Users**
2. Select the **Users** tab
3. Review your existing users

Note: Users from your previous Digital Banking platform should appear. If any are missing, you'll need to re-add them.

4. Each user must have a **Role assigned** before they can access Digital Banking

Role Name

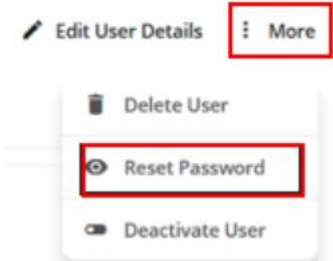
Apply All Permissions Below

Users in this role will be able to access and perform all actions listed below.

Apply All Permissions Below

Role

Select ▼

 Edit User Details ⋮ More

- Delete User
- Reset Password
- Deactivate User

Add a Role to a User

1. Go to **Roles**
2. Select **Add New Role**
3. Enter a **Role Name**
 - Examples: Admin, Office Manager, Bookkeeper, Accountant
4. Choose permissions:
 - Select **Apply All Permissions Below** for full access
 - Or choose specific **accounts and transaction permissions**
5. Save the role
6. Go back to **Manage Users**
7. Select the user
8. Click **Edit User Details**
9. Choose the role from the **Role dropdown**
10. Click **Save**

You can also update user details like phone number, address, and title.

The screenshot shows a 'User Details' form with the following fields:

- First Name
- Last Name
- Address (optional)
- Address 2 (optional)
- City (optional)
- State (optional)
- ZIP Code (optional)
- Title (optional)
- Home Phone (optional)
- Mobile Phone (optional)
- Work Phone (optional)
- Email
- Username

Below the form is a 'Send Password to' dropdown menu with 'Select' as the current option. To the right is a 'Select Role' section with a dropdown menu showing 'Role' and 'Select' as the current option. Below this is a 'Review' button and a 'Confirm' button.

+ Add A New User

Access Permission

Select

- Custom
- No Access
- Unrestricted
- Weekdays 8:00 am to 6:00 pm
- Weekdays 9:00 am to 5:00 pm

← Review **Confirm**