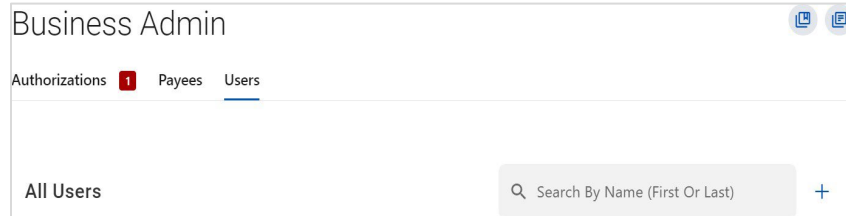


## Business Online Banking Creating a User – Quick Guide

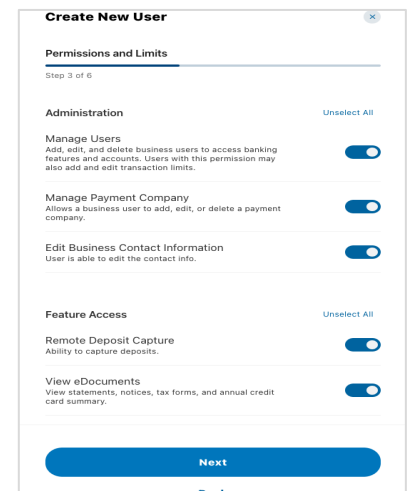
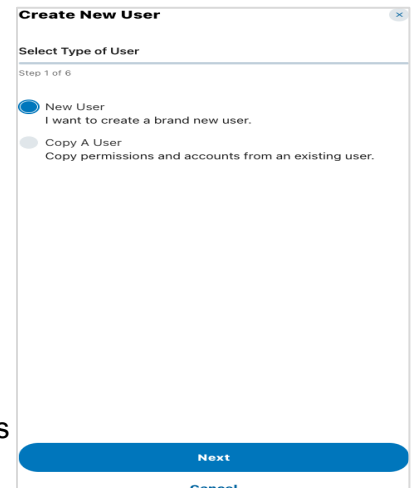
Use the **Users** tab in the **Business Admin** Widget to create, manage, delete, freeze, and delete Users, accounts, permission, and feature flags.



### Create a New User

To create a new User:

1. Click the **Users** tab in the **Business Admin** widget.
2. Click **+** next to the Search box.
3. The **Create New User - Select Type of User** window opens.
4. From **Select Type of User**, select **New User**.
5. Click **Next**.
6. The **Create New User - Basic Information** window opens.
7. Fill in the following fields for the new user: **First Name, Last Name, Email, Primary Phone Number, Secondary Phone Number, and Office Phone Number**.
8. In the **Username** field, enter the username for the User. Usernames must be unique. They must be alphanumeric and can't contain spaces. If the username is in use, the system shows an error message and prevents the master user from assigning duplicate usernames.
9. In the **Address** field, enter the **Address** for the User.
10. Click **Next**. The **Create New User - Permissions and Limits** window opens.
11. In the **Permission and Limits** section, set the permissions and limits for the new user.




\*\* You can edit the permissions after you create the user.

Permissions include:

- **Administration** - Whether the user can manage users, payment companies, and business contact information.
- **Feature Access** - Whether the user can manage debit and credit cards, eDocuments, and cards.
- **Payment Types** - Set transaction access limits.
- **Payment Destination** - Whether the user can manage ACH, Wire, and Bill Pay payees, add external accounts, and member accounts for transfers.
- **Templates** - Whether the user can create, edit, and manage payment templates.
- **Receivables** - Whether the user can capture deposits.

12. Click **Next**. The **Create New User - Accounts** window opens.
13. Click **+** **Select Accounts** to open a list of the User's accounts.

14. Select the checkboxes for the accounts that are applicable for the User and click on **Select Accounts**. The system shows a success message with the number of accounts added for the user. You can add or remove accounts for that user.
15. Click **Next**. The **Create New User - Account Permissions** window opens with account level permissions.
16. Click the toggles for the individual permissions or click **Select All** to automatically select all fields. You can edit the permissions after you create the user. For more information on how to edit users account permissions see the full Business Online Banking User Guide.
17. Click **Next**.
18. The **Create New User - Review Information** window opens.
19. To edit a category, Click the Edit  pencil.
20. Edit fields as needed and click **Submit**.
21. Broadview has Multi-factor Authentication (MFA) configured, click **Send Code** to send a code.
22. Enter the code and click **Verify**.

After the system verifies your code, a success message indicates the User was added.