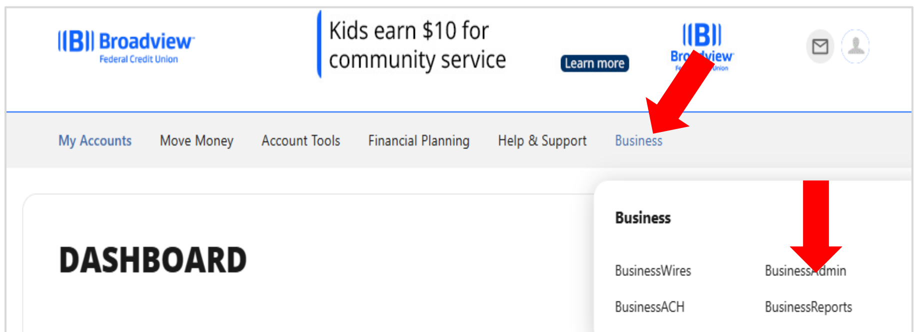
Business Online Banking - Admin User Quick Guide

Desktop:

This **quick guide** will give you an overview of the Admin User, creating Users, and assigning permissions for Users. For all system features and details, please refer to the **Business Online Banking Master User Guide.**

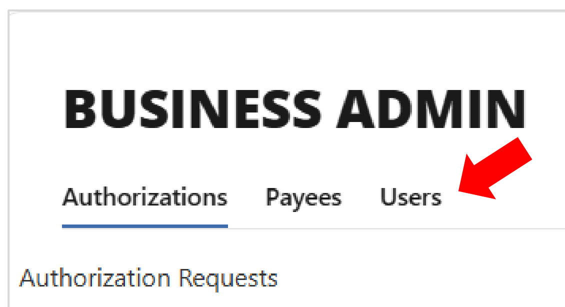
To login to Broadview's Business Online Banking users may visit Broadview's website at www.broadviewfcu.com or download the Broadview Mobile App.

As the Admin User you can add and assign Permissions to Users giving them access to accounts and services. You can also assign Admin Permissions to Users. Users with Admin Permissions can add, modify, unlock and delete users from the platform.



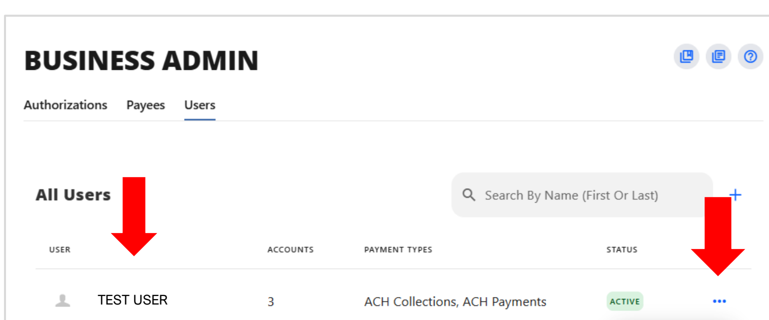
At the Dashboard screen, Click the **Business Widget.**

Click **BusinessAdmin.**



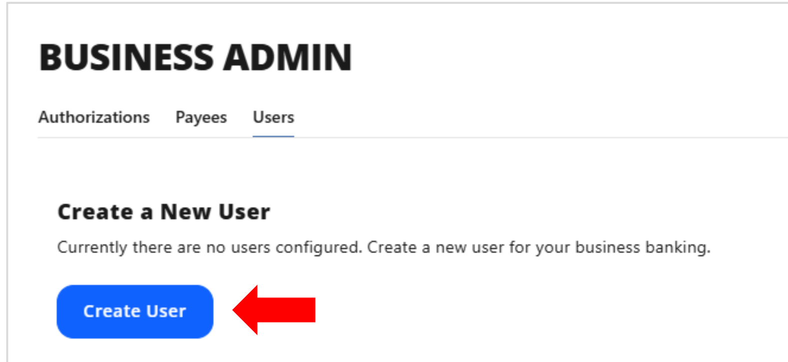
Click **Users** to Add, Edit or Delete a User.

If you have existing Users set up, they will appear on this screen. You can choose the **… Ellipses** to edit any existing User. See below for more information on Editing a User.



To Create a User.

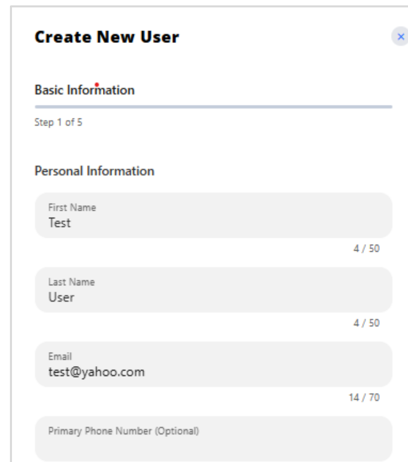
Click **Create User.**



At the Create New User screen – **Enter new User information as prompted.**

Most information on the General screen is optional. You are strongly encouraged to add the information. Information includes:

- First Name
- Last Name
- Email
- Primary Phone Number *This is important to add!
- Username
- Address



***Jot down the Username you create. You will provide this to your User as the User will need it to login.**

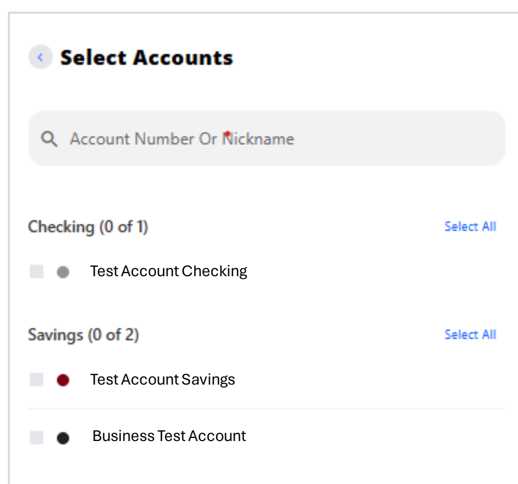
Click **Next.**

The System will prompt you to set up Permissions for your new User. Permissions provide your User(s) with access to various accounts, services, and actions within your online banking profile.

Account Permissions.

Select all that you wish to apply to your New User.

- View account
- ACH
- Bill Pay from
- View statements
- View draft images
- Transfer funds out from
- Transfer funds into
- Stop Payment
- One-time payment
- People pay from
- Balance peek
- View Images

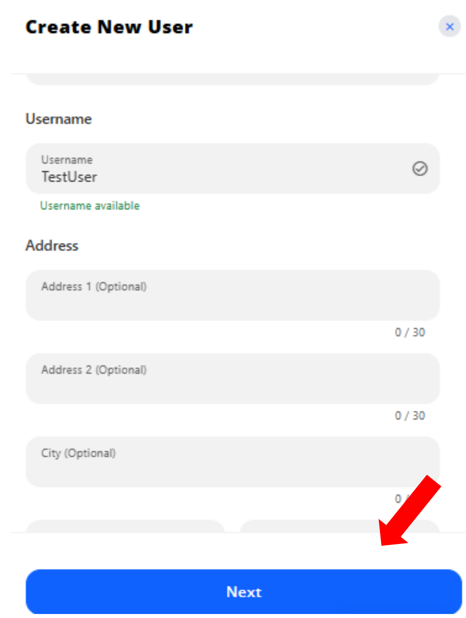


Review information and click **Submit.**

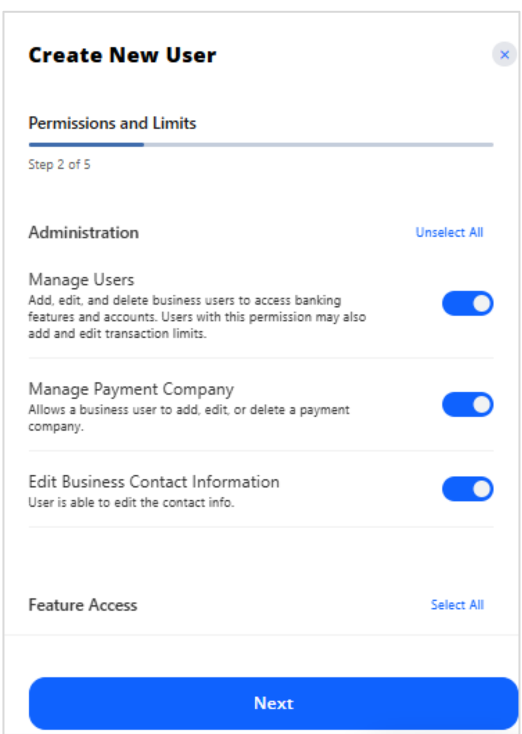
Additional Permissions are required for each Service you have access. For example, if you have ACH services, you will set up Permissions specifically for the ACH service. Make sure you expand each section to enable your User with the required Permissions intended.

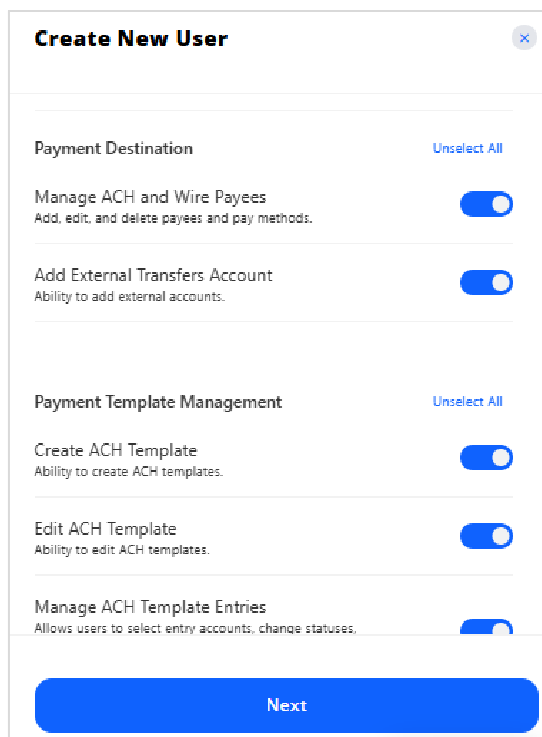
These permissions include:
Selecting Accounts
Payment Types

- ACH Collections (Debits)
- ACH Payments (Credits)
- Wires
- Bill Pay



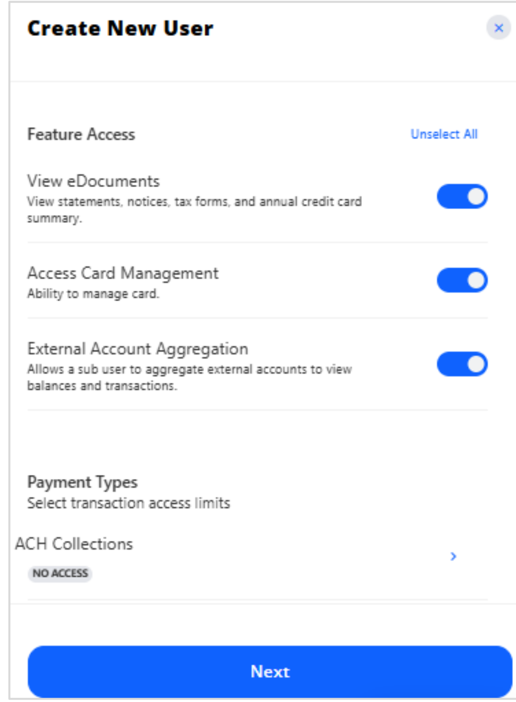
The images below provide an example of the Permissions set up for your User. Toggles will turn the Permissions ON or OFF. Select All will set each Toggle within the section.

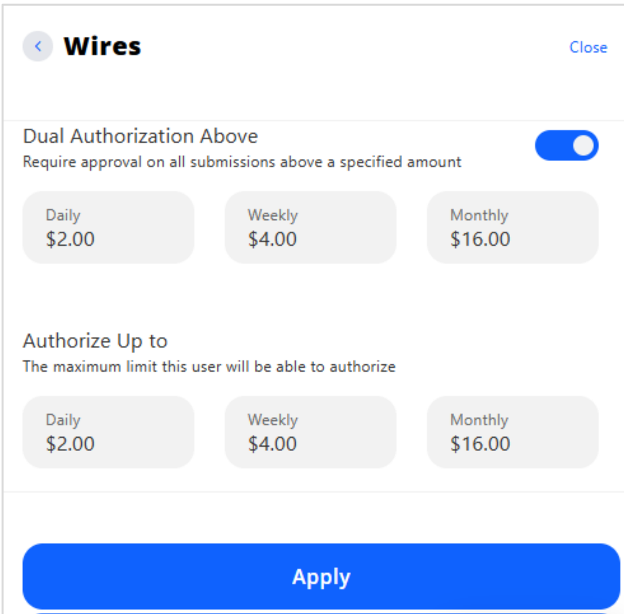




Under each **Payment Type**, you will enter detailed Permissions for access to specific services and limits within each section. The Select All option will be a useful tool if you are giving a User full access.

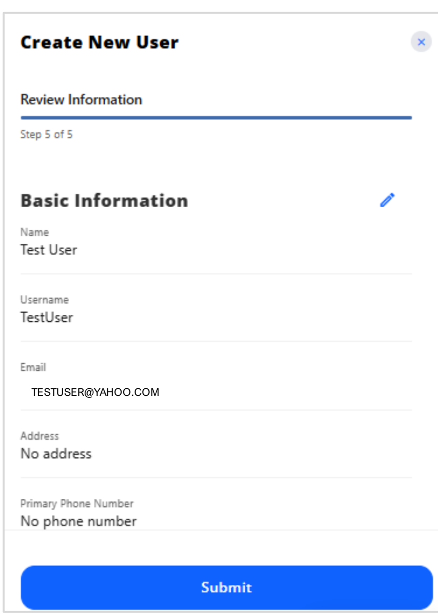
Some sections will require you to set **Limits** for your Users for that specific service. For example, the Wire option is listed below.

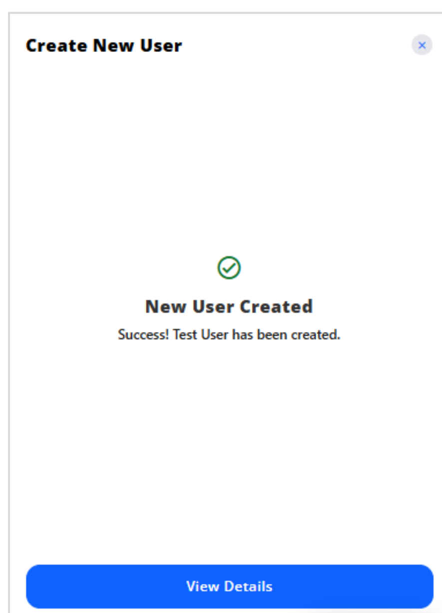




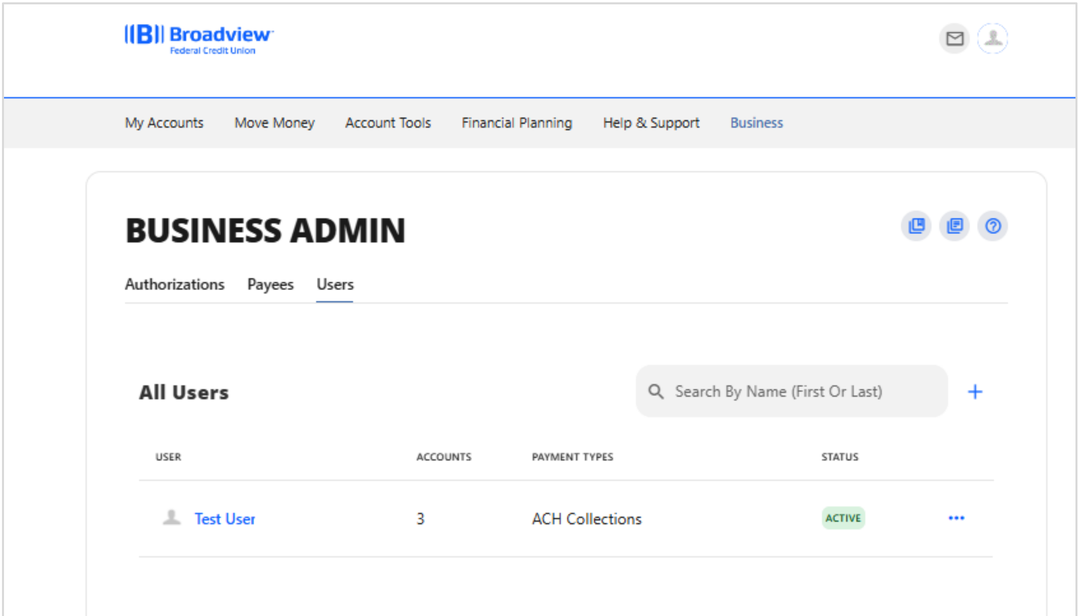
You must **Review Information** when you have completed your User set up. Click **Submit** when you have completed setting up *Permissions and Limits*.

New User Created will confirm your User has been created.





Your **New User** will now be listed on your main **Users** screen.



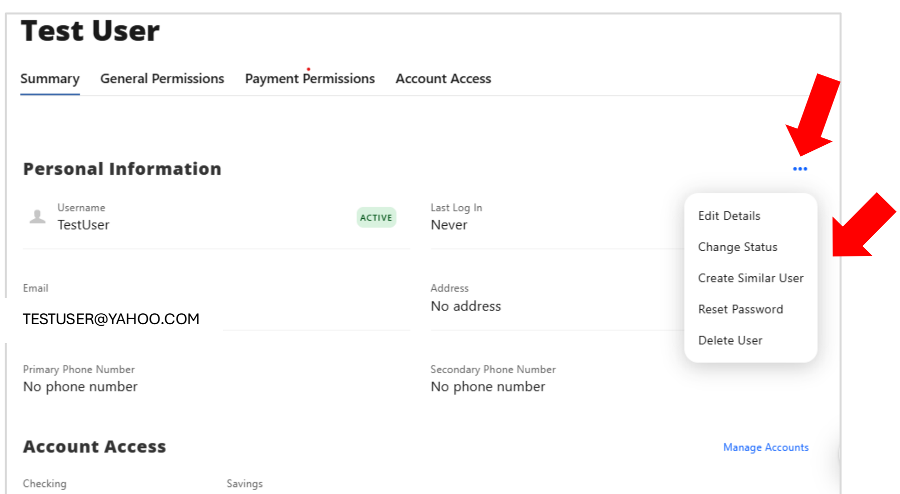
After you have created your User, a temporary password will be sent via email to the email address you entered in the User's profile. The Temporary Password expires in 24 hours. Please advise your new User to login before the password expires.

***Make sure you provide your new User with the Username you created for them.**

To Edit Users, click on the **… Ellipsis** at the right side of their Username on the User Screen.

Edit options include:

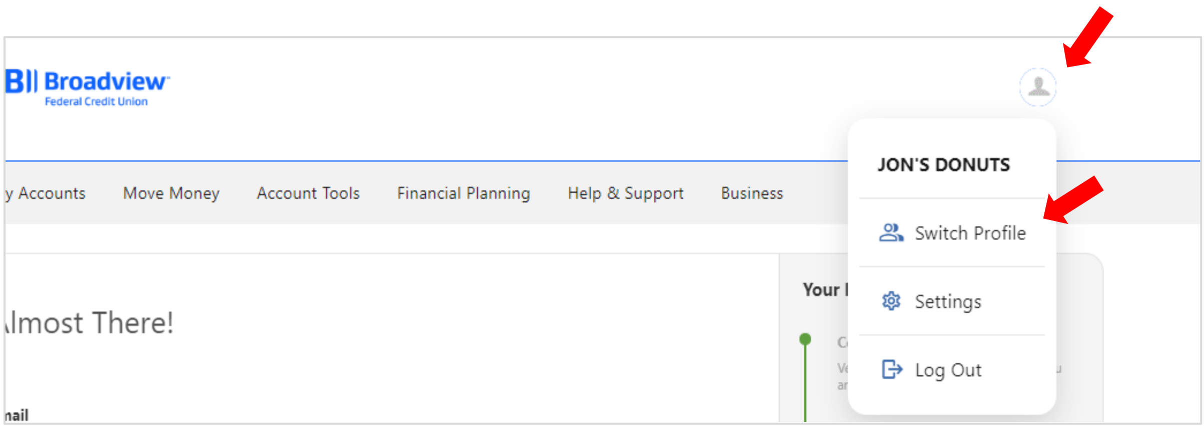
- Edit Details
- Change Status
- Create Similar User
- Reset Password
- Delete User



To view **Personal accounts** that were set up previously (If Applicable):

Click the **Person Icon** on the main **Dashboard.**

Click **Switch Profile.**



The account screen will come into view.

Choose the **Account** you wish to switch to.

Click **Switch**.