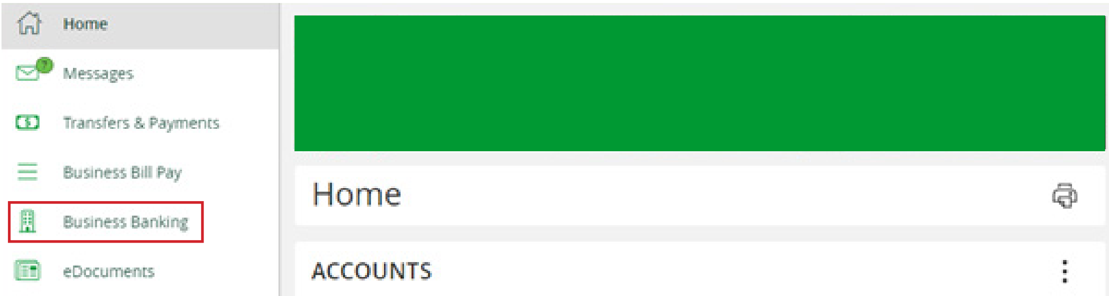
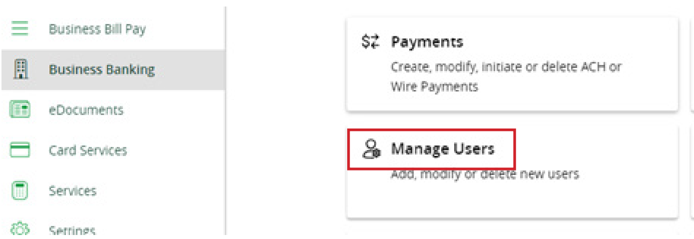
Adding a Corporate User

1 In the Navigation Menu, **Select Business Banking.**

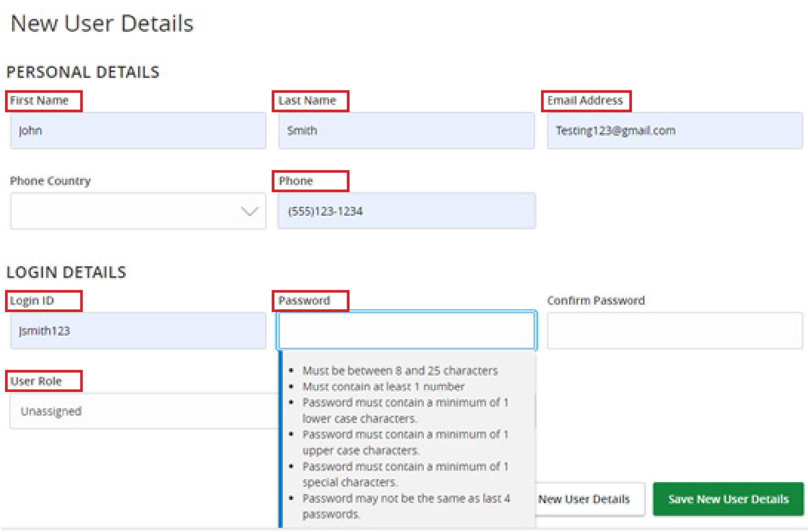


2 Select **Manage Users.**



3 **A list of the current users will be displayed.**

- To add a new user select **"Add User".**
- Complete the user information with Name, Email, Phone Number included.
- Create a Login ID *** Jsmith123 ***.
- Create a Temporary Password for them to use the first time they log in.



> **Additional steps on the next page.**

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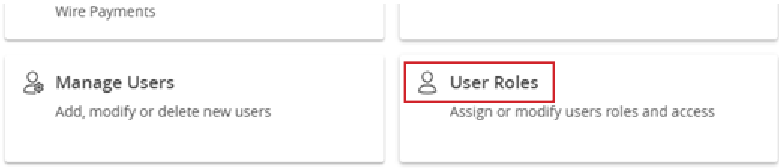
4 Select "Save New User Details".

- Adding a new user will require a Secure Access Code or a Token to confirm and save.

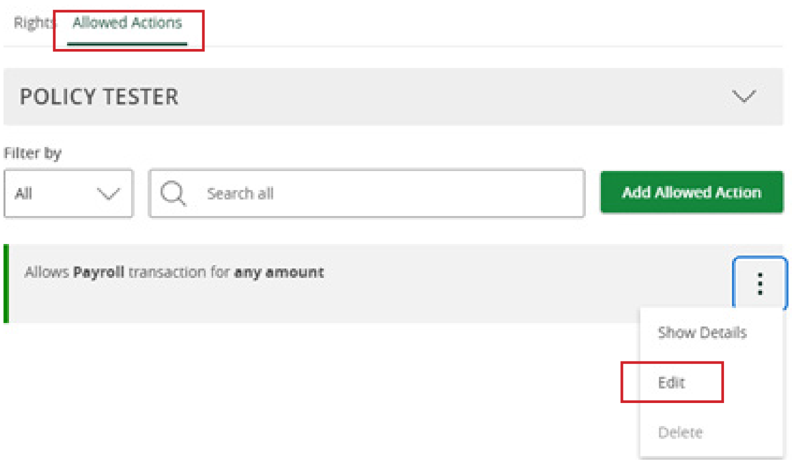
5 Route back to Business Banking and Select "User Roles"



- This is where you will edit the permissions for each user.

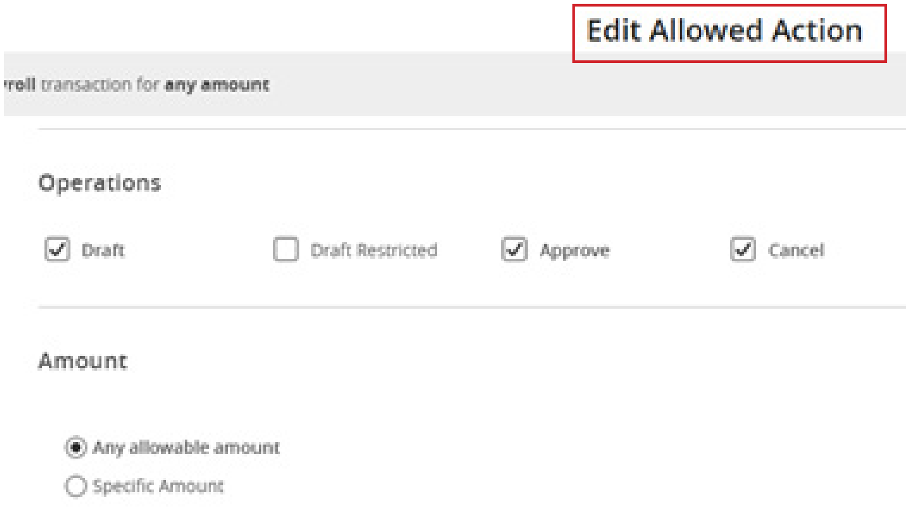
6 Select the Pencil on the right for the user you would like to Edit.

- Clicking into Transactions you can enable permissions, modify rights, edit limits, and viewing access for each user.
- Set View to All; this allows the user to view all transactions completed.
- Set their Transaction Daily and Monthly Limits.
- If setting up Dual Control for a user to only draft or only approve files:
  - Select Allowed Actions.
  - Select the Three Dots.
  - Select Edit.



  - This will open an Operations Page, where you can edit their Draft or Approve Rights.

> Additional steps on the next page.



- Save and go through each function and assign as necessary.

7 Click into Features to modify user's features.

- Enable Rights: Access to all payment templates, view all recipients, manage recipients, manage users, and Positive Pay as needed.
  - Manage Users is to add or delete users.
  - Manage User Roles is to update current user permissions.
  - Corporate Information Reporting is access to reports.
- Save.

8 Click into Accounts to modify the accounts your users have access to.

- Select unassigned accounts and enable View / Deposit / Withdraw as needed.
  - If you are adding accounts in bulk use the main check boxes at the top
  - If you are adding accounts one by one, they will move up to the top of the screen when edits are made, just be sure you double check the accounts before saving.
- Save.

? **Get in touch.** treasurysupport@rcbbank.bank or call 877.813.4663