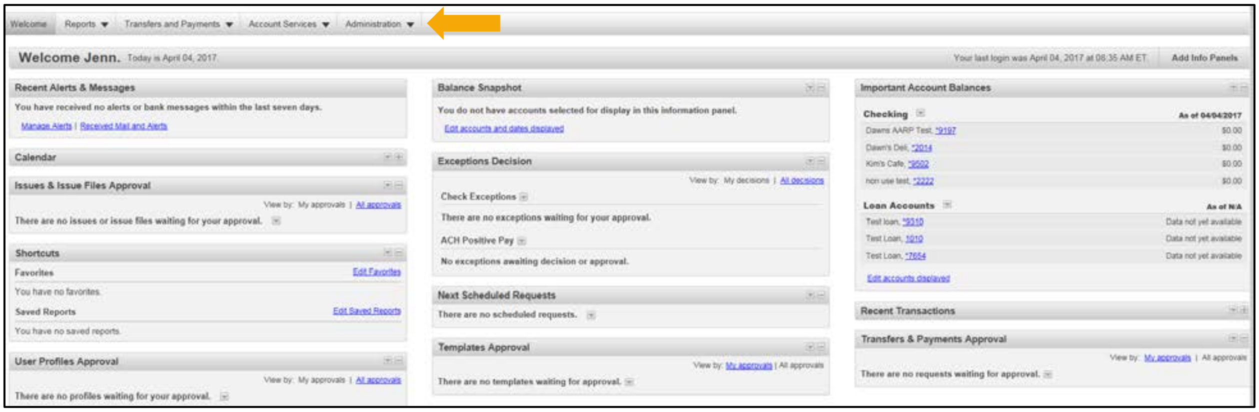
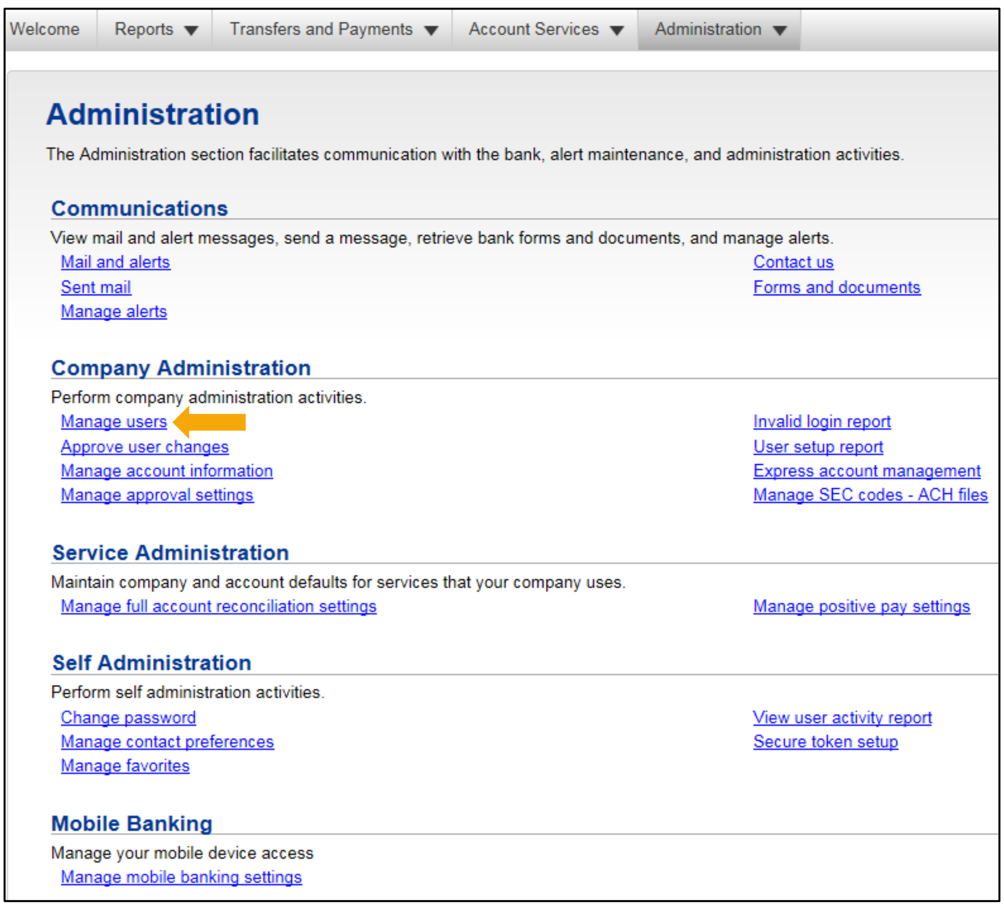
Main Street BANK

BUSINESS INTELLIGENCE ONLINE BANKING – HOW TO ADD AN ADDITIONAL USER

- Logon to Business Intelligence Online Banking.
- Click on “Administration.”



- Click on “Manage users” under Company Administration.



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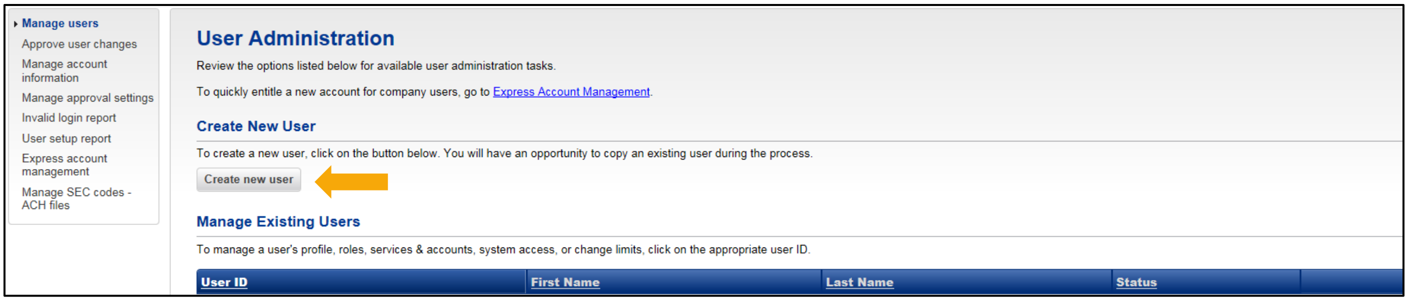
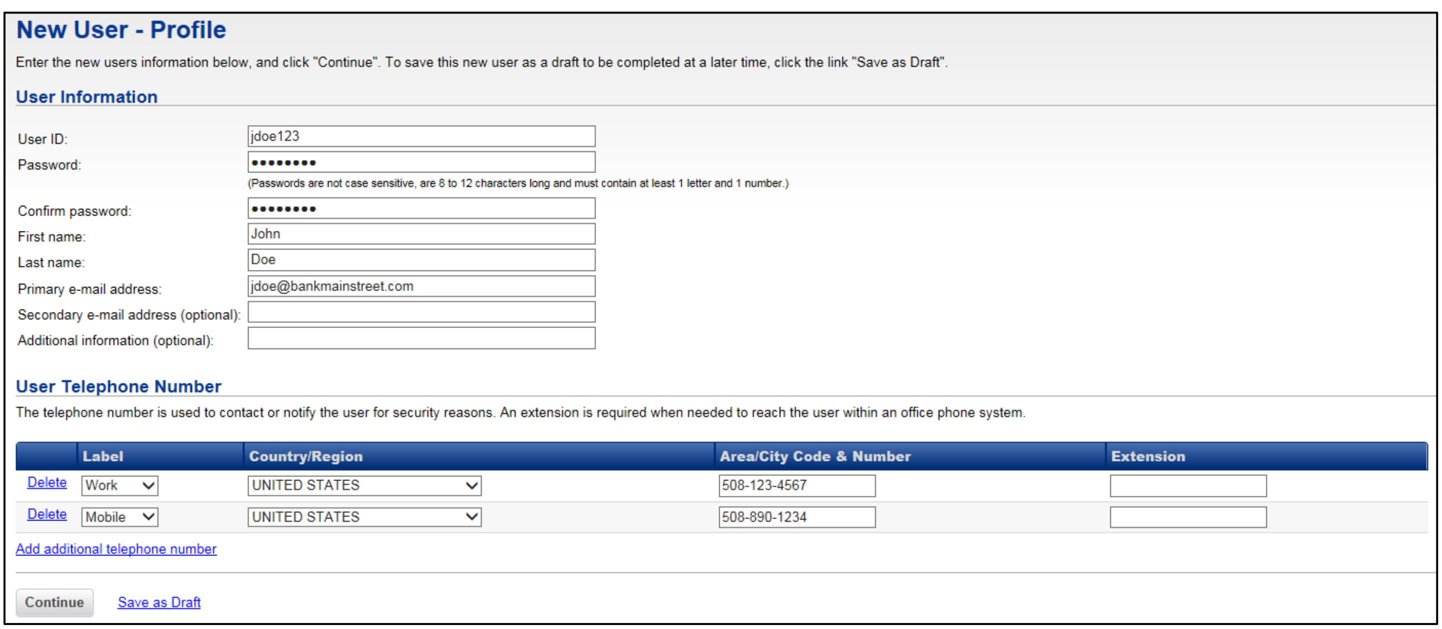
- Click on the **“Create new user”** button.



- Fill in all required fields:
  - User ID does not support special characters
  - Password is a generic password you will create for the user’s initial sign-on. The user will be prompted to change their password once enrolling for the first time. *This generic password must be between 8 to 12 characters and must contain at least 1 letter and 1 number; special characters are allowed but not required.*
  - Enter a valid email address for the user you are adding.
  - Please ensure you use a valid phone number for the user. When signing in for the first time the user will need to complete a security challenge in order to continue. The security challenge is used with either a landline (does not support extensions) or a mobile device.
- Click on “Continue.”



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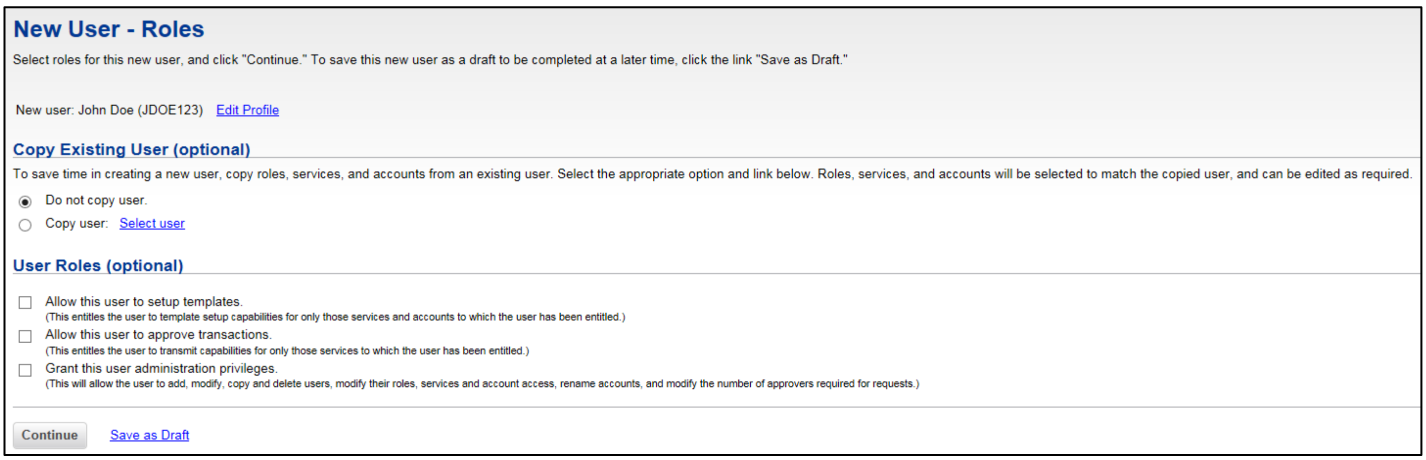
- Carefully select the role you would like this user to have:
    - For companies looking to add a user with view only access no roles need to be assigned.
    - For companies implementing dual control, one user would have the set-up templates role and a secondary user would be added with the approve templates role.
    - If "grant this user administration privileges" is selected, the new user will have **full** access to perform any and all services within online banking.
    - If you have questions regarding the user roles, please contact a member of our Cash Management department at 508-481-8300.


New User - Roles

Select roles for this new user, and click "Continue." To save this new user as a draft to be completed at a later time, click the link "Save as Draft."

New user: John Doe (JDOE123) Edit Profile

Copy Existing User (optional)

To save time in creating a new user, copy roles, services, and accounts from an existing user. Select the appropriate option and link below. Roles, services, and accounts will be selected to match the copied user, and can be edited as required.

- Do not copy user.
- Copy user: Select user

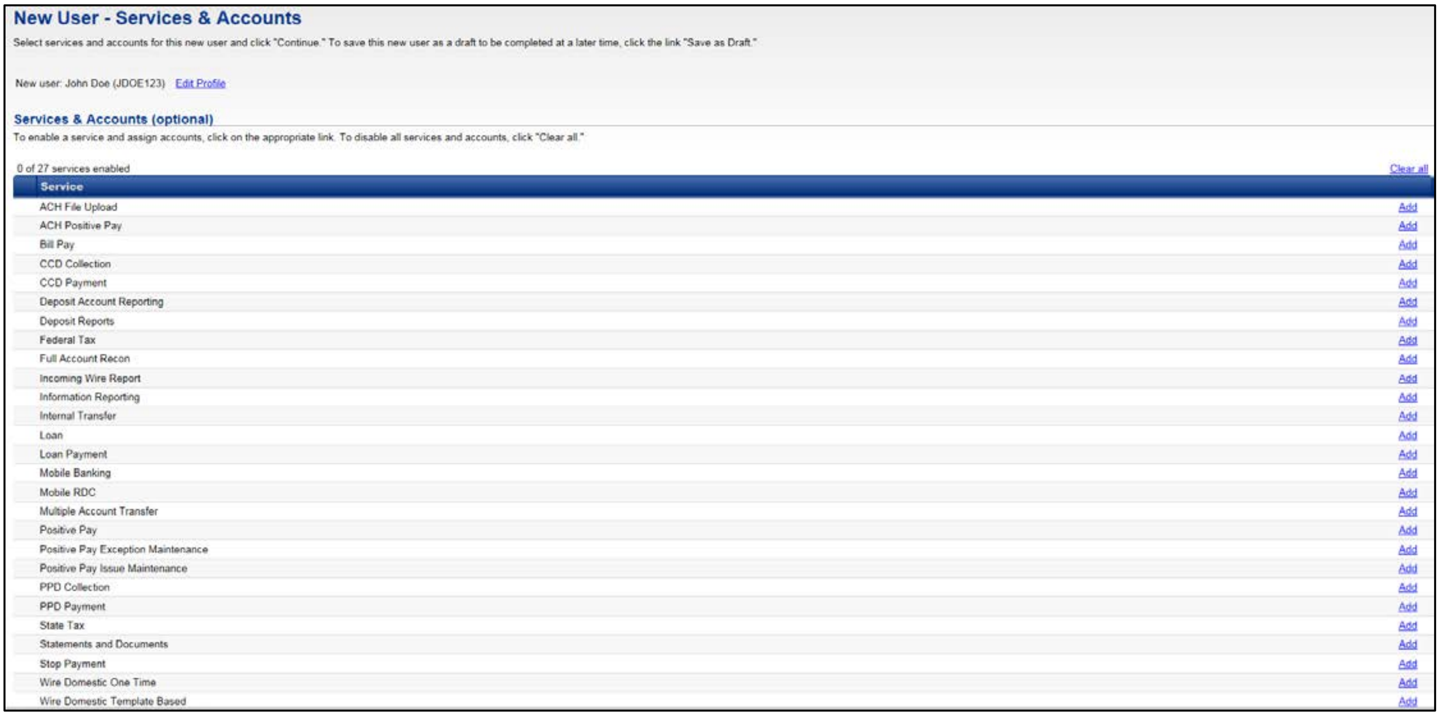
User Roles (optional)

- Allow this user to setup templates.
(This entitles the user to template setup 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 to which the user has been entitled.)
- 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

- Proceed to adding "New User – Services & Accounts."

- Services will vary based on the services the company is enabled for. When adding services to a new user, select only the services you want that user to have access to. If you have any questions, please contact a member of the Cash Management department. The standard options for companies looking to add a user with view only access are deposit reports; information reporting and statements and documents.



New User - Services & Accounts

Select services and accounts for this new user and click "Continue." To save this new user as a draft to be completed at a later time, click the link "Save as Draft."

New user: John Doe (JDOE123) Edit Profile

Services & Accounts (optional)

To enable a service and assign accounts, click on the appropriate link. To disable all services and accounts, click "Clear all."

0 of 27 services enabled — Clear all

Service	
ACH File Upload	Add
ACH Positive Pay	Add
Bill Pay	Add
CCD Collection	Add
CCD Payment	Add
Deposit Account Reporting	Add
Deposit Reports	Add
Federal Tax	Add
Full Account Recon	Add
Incoming Wire Report	Add
Information Reporting	Add
Internal Transfer	Add
Loan	Add
Loan Payment	Add
Mobile Banking	Add
Mobile RDC	Add
Multiple Account Transfer	Add
Positive Pay	Add
Positive Pay Exception Maintenance	Add
Positive Pay Issue Maintenance	Add
PPD Collection	Add
PPD Payment	Add
State Tax	Add
Statements and Documents	Add
Stop Payment	Add
Wire Domestic One Time	Add
Wire Domestic Template Based	Add

It is the administrator's responsibility to select the appropriate services for each user depending on the roles. User entitlements and services are enabled at the administrator's sole discretion.

- This example shows adding a user with bill pay services, information reporting and internal transfers.
- If the administrator chooses to grant the new user with bill pay entitlements, please click on the "Add" button to the far right of "Bill pay." When the window expands select only the accounts that you want the new user to have access to bill pay services on. Click on "Save changes" and continue with additional services as needed.

Bill Pay — Remove

NOTE: user who are assigned the Administration role have access to all accounts within Bill Pay, regardless of the entitlements set here.

Description	Account Number	TRC	Entitled Account
Dawns AARP Test		211370752	☐
Dawn's Deli		211370752	☑
Kim's Cafe		211370752	☑
Mobile		211370752	☐

Save changes | Do not save changes

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- If enabling the user for Information reporting, select the add button to the right of information reporting. Place a check box beside the accounts you want the user to have access to. Repeat this process for each service you choose to enable for the new user. Remember to click on **"Save changes"** for each service and **"Continue"** in the bottom left.

Information Reporting   Remove

Description	Account Number	TRC	Entitled Account ☑
Dawns AARP Test		211370752	☑
Dawn's Deli		211370752	☑
Kim's Cafe		211370752	☑
Mobile		211370752	☑
non use test		211370752	☑

Save changes   Do not save changes

Internal Transfer   Remove

Description	Account Number	TRC	Entitled From Account ☐	Entitled To Account ☐
Dawns AARP Test		211370752	☑	☐
Dawn's Deli		211370752	☐	☑
Kim's Cafe		211370752	☑	☑
Mobile		211370752	☐	☐
non use test		211370752	☐	☐

Save changes   Do not save changes

Continue   Save as Draft

- If you have selected bill pay as an entitlement for the new user, the limits will default to the company limit. You may decrease this limit at the user level. Click on "Continue" to proceed.

New User - Bill Pay Limits

Edit Profile

New user: John Doe (JDOE123)

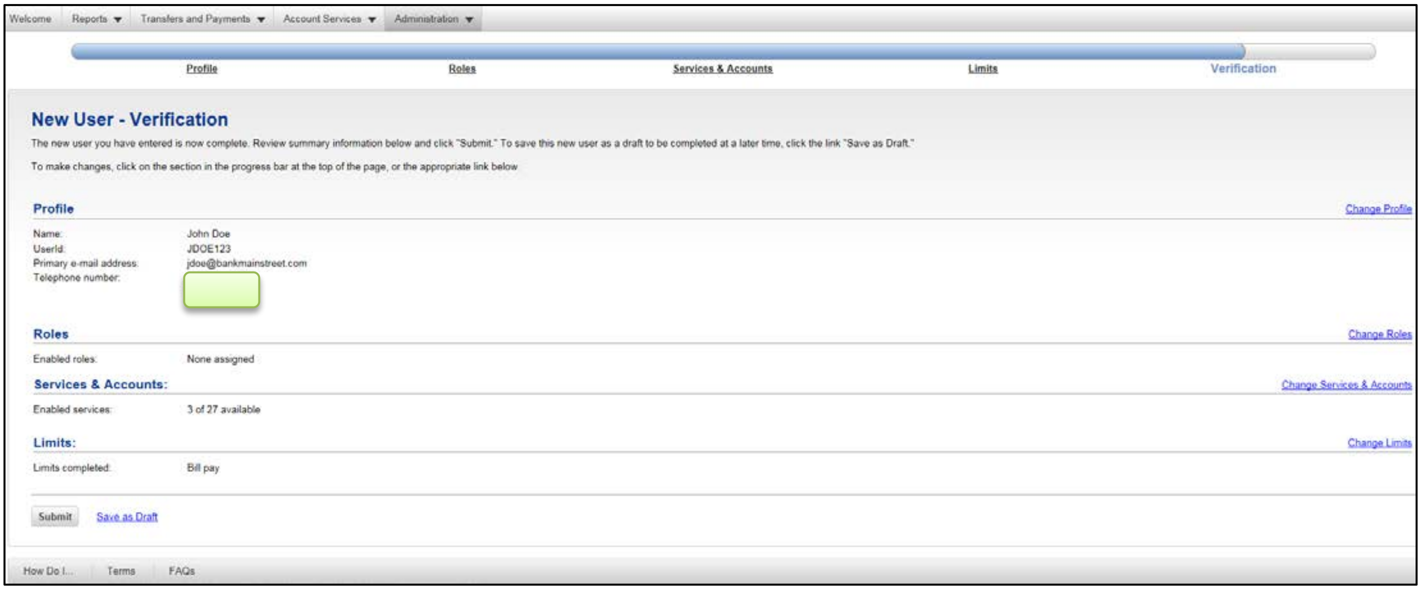
Bill Pay Company Limits

Enter user limit amounts for each of the Bill Pay companies. The limit cannot be greater than the company limit set by the bank. View Bill Pay Company Limits.

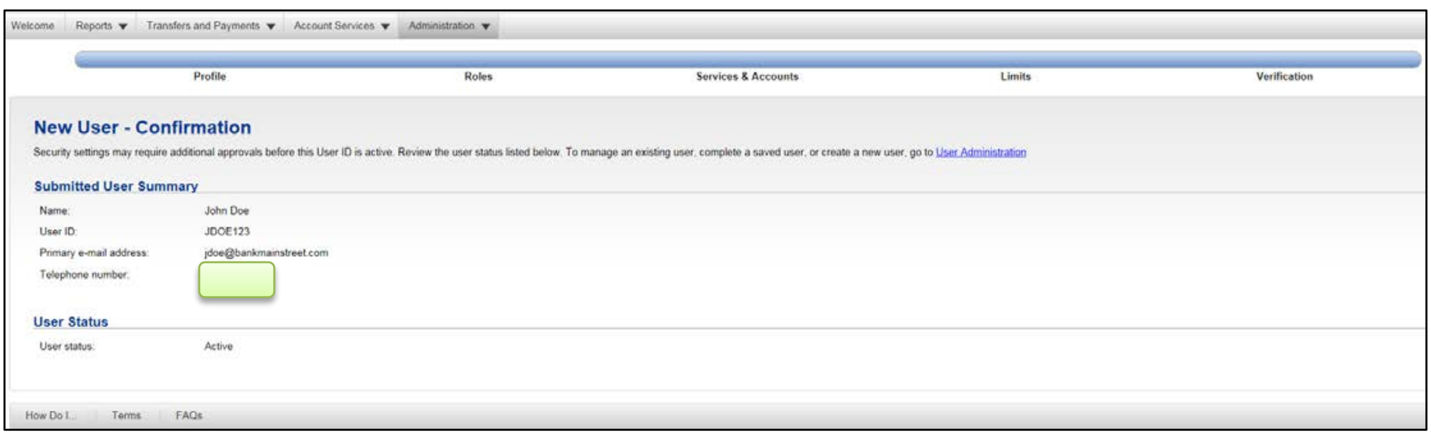
Company	User Transaction Limit
Dawns Deli	9999.99
Kims Cafe	9999.99

Continue   Save as Draft

- You will be brought to the verification page. Please review the information, makes edits if needed and click "Submit" when finished.



- The confirmation page will display.



- The administrator will contact the new user to provide the information needed in order to sign on for the first time. This will include the Company ID, which is a numeric field that is required each time any users access the online banking site, along with their User ID and temporary password.