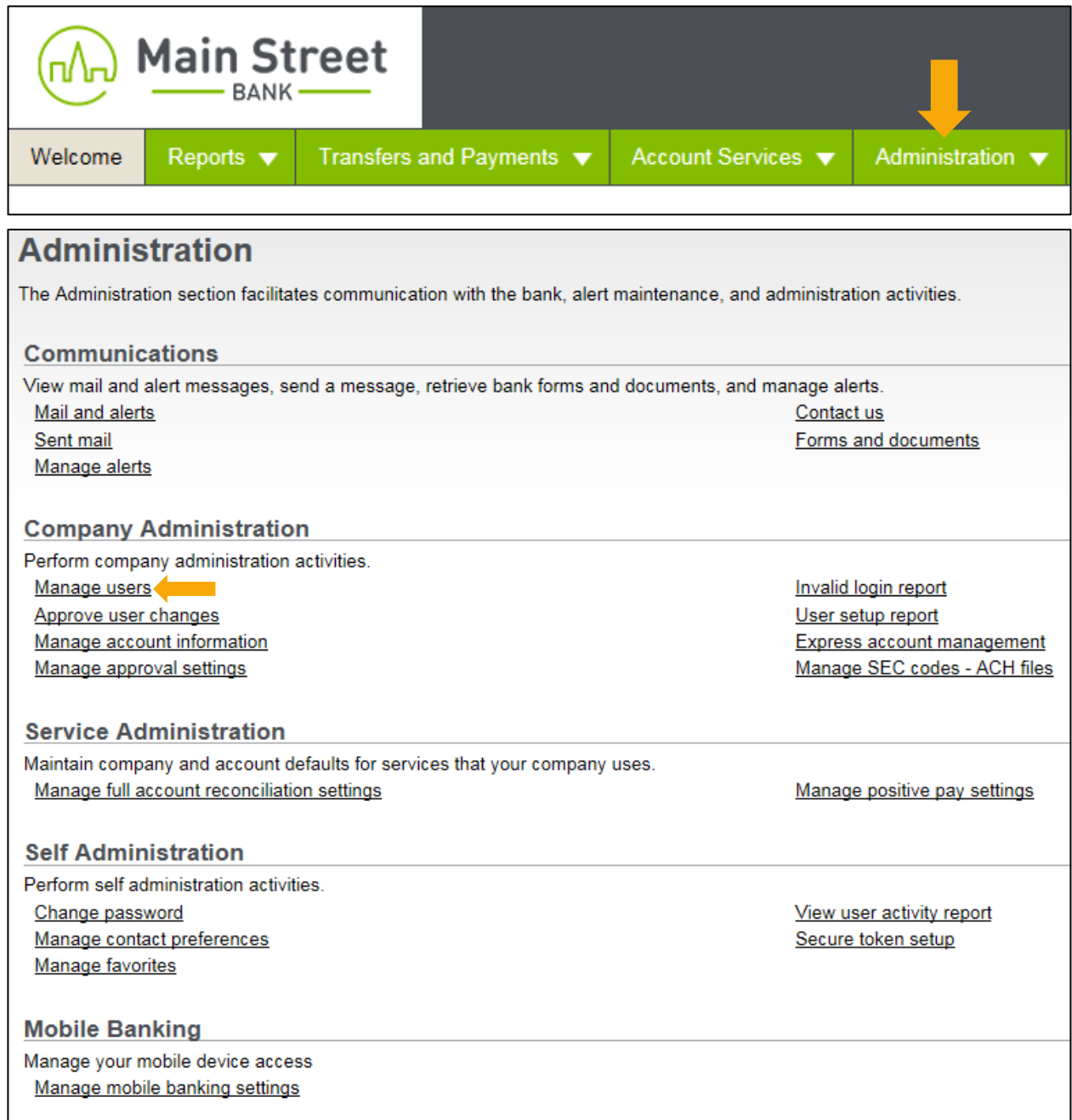


**BUSINESS INTELLIGENCE ONLINE BANKING – HOW TO GRANT A USER ACCESS  
TO A NEW ACCOUNT**

The company administrator has the ability to grant access and permissions to additional users.

- Logon to Business Intelligence Online Banking.
- Click on “**Administration**” and then click on “**Manage users**” under Company Administration.



**Main Street BANK**

Welcome | Reports ▼ | Transfers and Payments ▼ | Account Services ▼ | **Administration ▼**

---

**Administration**

The Administration section facilitates communication with the bank, alert maintenance, and administration activities.

**Communications**

View mail and alert messages, send a message, retrieve bank forms and documents, and manage alerts.

[Mail and alerts](#) | [Contact us](#)  
[Sent mail](#) | [Forms and documents](#)  
[Manage alerts](#)

**Company Administration**

Perform company administration activities.

[Manage users](#) ← | [Invalid login report](#)  
[Approve user changes](#) | [User setup report](#)  
[Manage account information](#) | [Express account management](#)  
[Manage approval settings](#) | [Manage SEC codes - ACH files](#)

**Service Administration**

Maintain company and account defaults for services that your company uses.

[Manage full account reconciliation settings](#) | [Manage positive pay settings](#)

**Self Administration**

Perform self administration activities.

[Change password](#) | [View user activity report](#)  
[Manage contact preferences](#) | [Secure token setup](#)  
[Manage favorites](#)

**Mobile Banking**

Manage your mobile device access

[Manage mobile banking settings](#)

- Click on the **User ID** of the user you are enabling access to.

**User Administration**

Review the options listed below for available user administration tasks.

To quickly entitle a new account for company users, go to [Express Account Management](#).

**Create New User**

To create a new user, click on the button below. You will have an opportunity to copy an existing user during the process.

[Create new user](#)

**Manage Existing Users**

To manage a user's profile, roles, services & accounts, system access, or change limits, click on the appropriate user ID.

User ID	First Name	Last Name	Status	
ADMIN2			Inactive	<a href="#">System access</a>
CALLCENTER	CALL	CENTER	Active	<a href="#">System access</a>
CASHMGMT01	Cashmgmt	Test	Active	<a href="#">System access</a>

- Click on **"Edit Services & Accounts."**

**Services & Accounts** [Edit Services & Accounts](#)

Service

- The administrator will edit each service the additional user will need access to for this new account.
- Click **"Change"** beside the service you are enabling.

✓ Deposit Reports	Service enabled, accounts not applicable.	<a href="#">Remove</a>
✓ Federal Tax	Service enabled, accounts entitled.	<a href="#">Change</a>
✓ Full Account Recon	Service enabled, accounts entitled.	<a href="#">Change</a>
✓ Incoming Wire Report	Service enabled, accounts not applicable.	<a href="#">Remove</a>
✓ Information Reporting	Service enabled, acco	<a href="#">Change</a>
✓ Internal Transfer	Service enabled, accounts entitled.	<a href="#">Change</a>

Description	Account Number	TRC	Entitled Account
		211370752	<input type="checkbox"/>
		211370752	<input checked="" type="checkbox"/>
		211370752	<input checked="" type="checkbox"/>
		211370752	<input checked="" type="checkbox"/>
		211370752	<input checked="" type="checkbox"/>
Test loan		211370752	<input checked="" type="checkbox"/>
Test Loan		211370752	<input checked="" type="checkbox"/>
Test Loan		211370752	<input checked="" type="checkbox"/>

[Save changes](#) [Do not save changes](#)

<input checked="" type="checkbox"/> Statements and Documents	Service enabled, accounts entitled. <a href="#">Change</a>
<input checked="" type="checkbox"/> Stop Payment	Service enabled, accounts entitled. <a href="#">Change</a>
<input checked="" type="checkbox"/> Wire Domestic One Time	Service enabled, accounts entitled. <a href="#">Change</a>
<input checked="" type="checkbox"/> Wire Domestic Template Based	Service enabled, accounts entitled. <a href="#">Change</a>

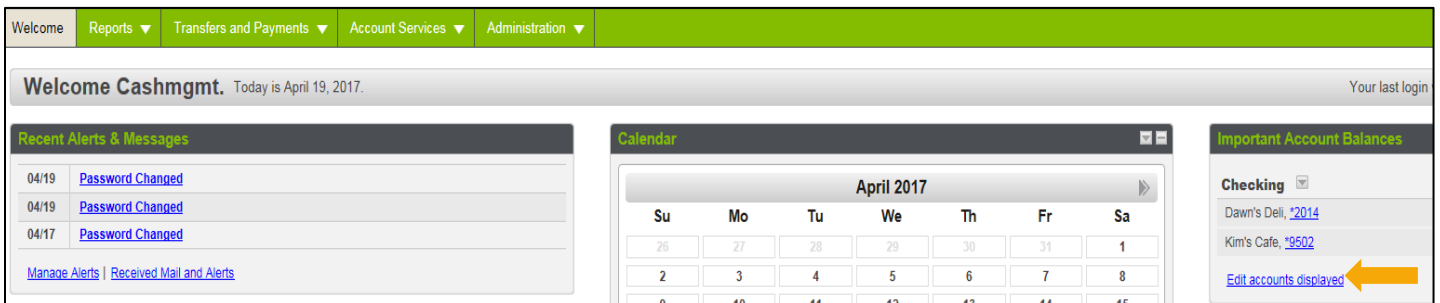
Save changes Do not save changes

- You must click on **“Save changes”** for each individual service, and then click on **“Continue”** in the bottom left corner. *For example, if you want the additional user to have bill pay access from the new account as well as statements and documents, you must edit both bill pay and statements & documents.*

### ACTION REQUIRED BY THE ADDITIONAL USER

When the additional user signs on to online banking, there is an additional step they must take in order to view the newly added account.

- Under the important account balances section, click on **“Edit accounts displayed.”**



Welcome | Reports | Transfers and Payments | Account Services | Administration

Welcome Cashmgmt. Today is April 19, 2017. Your last login

**Recent Alerts & Messages**

- 04/19 [Password Changed](#)
- 04/19 [Password Changed](#)
- 04/17 [Password Changed](#)

[Manage Alerts](#) | [Received Mail and Alerts](#)

**Calendar**

April 2017

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15

**Important Account Balances**

**Checking**

- Dawn's Dell, \*2014
- Kim's Cafe, \*9502

[Edit accounts displayed](#)

- All available accounts for this user will display. Check the box of the appropriate account(s) and click **“Save.”**

### Edit Important Account Balances

[Return to Dashboard](#)

Select the accounts to display in the information panel and click "Save."  
You may select up to 7 accounts for each account type.

Checking     Loan

<input type="checkbox"/> *9197	<input checked="" type="checkbox"/> *2014	<input checked="" type="checkbox"/> *9502
<input type="checkbox"/> *3007	<input type="checkbox"/> *2222	

Save    Do not save