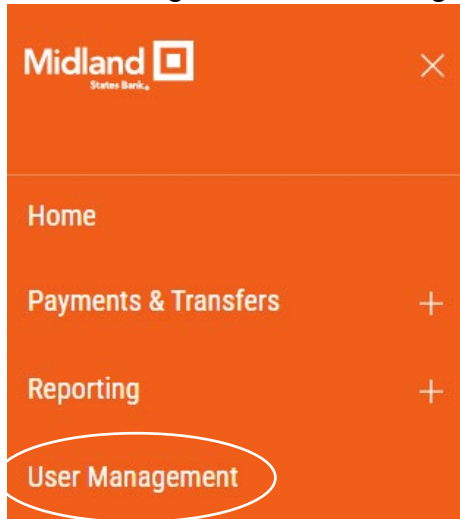
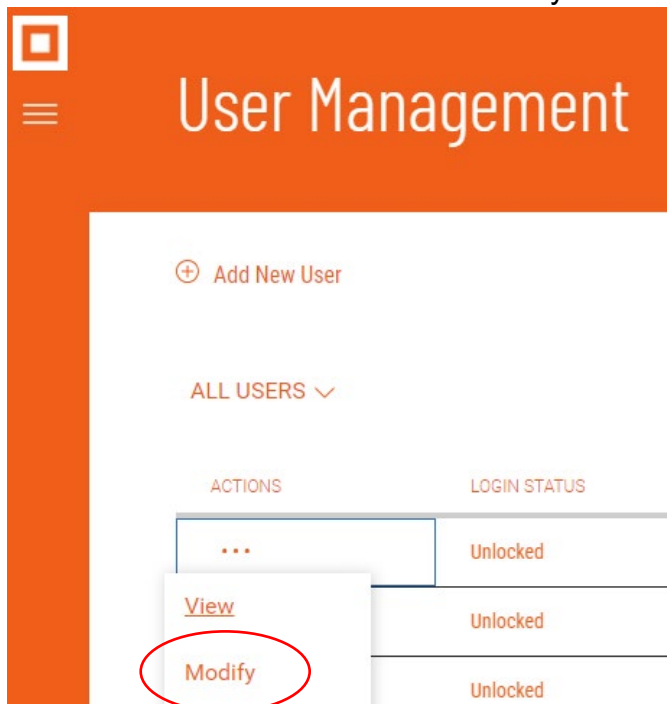


Walkthrough Guide: How to give authorized sub-users access to loan accounts in Business Online Banking.

1. Navigate to User Management



2. Locate the User and click Modify



3. Click Next

Burt Banker 11/40

CONTACT NAME
John D. Customer 16/40

DIRECTCONNECT ID
msbtestbbanker

PASSWORD

REPEAT NEW PASSWORD

- ✓ Passwords are case sensitive and must contain at least one of each of the following: upper case letter, lower case letter, number, special character.
- ✓ Password cannot contain Customer ID, or User ID.
- ✓ Password must be between 8 and 24 characters.
- ✓ The password fields must match.

855-696-4352 12/25

> Add Contact Fields

USER SETTINGS

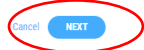
ENABLE DATE
01/29/2024

USER TYPE
User

VIP TOKEN SETTINGS

TOKEN SERIAL NUMBER [Modify](#)

ⓘ Token pending activation. The user will be asked to activate the token next time they are challenged.



4. Click Account Level Permissions, then click Select Accounts

5. Click the Transfers box next to each loan that the User needs to pay.

Note: The field will default the Transfer Ability to “Transfer To”

BBANKER | BURT BANKER
EDIT

Entitlements Limits Summary

Assign Services

Unselect All

Core Services

- Unselect All
- Bank Account Info Reporting
- Loan Account Info Reporting
- Statements
- Transfers
- Input
- Approval
- Stop Payments
- Input
- View Only

Others

ACCOUNT LEVEL PERMISSIONS STATEMENTS

Apply selection to All Accounts Select Accounts

ACCOUNTS	ACCOUNT TYPE	PERMISSIONS NAME	TRANSFERS	TRANSFER ABILITY	MOBILE CHECK DEPOSIT	BANK ACCOUNT INFO REPORTING	LOANS
			<input checked="" type="checkbox"/>	Select	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Business Loan	ILLOC		<input checked="" type="checkbox"/>	To	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Operating	DDA		<input checked="" type="checkbox"/>	From/...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Payroll	DDA		<input checked="" type="checkbox"/>	From/...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

VIEW 1-3 OF 3

DISPLAY 3 1

Cancel [BACK](#) [NEXT](#)

6. Click Next

7. Verify the Transfer Limits are correct

Note: This will impact all accounts with transfer abilities

BBANKER | BURT BANKER
EDIT

Entitlements **Limits** Summary

Assign Limits

Transfer Limits

ACCOUNT	ENTRY/DAY	ENTRY/TRANSACTION	MAX # PER DAY
Overall Combined Limits	\$ 999,999,999.99 <small>Maximum 999,999,999.99</small>	\$ 99,999,999.99 <small>Maximum 99,999,999.99</small>	999 <small>Maximum 999</small>

Cancel BACK **NEXT**

8. Click Next

9. Review the User's permissions, then click Save.

VIEW 1-3 OF 3

DISPLAY 3 1

Statements

ACCOUNTS	STATEMENT NAME	ONLINE NOTICE	ONLINE STATEMENT
Business Loan - 1234500067938		☑	☑
Operating - 67946		☑	☑
Payroll - 67938		☑	☑

VIEW 1-3 OF 3

Go to Entitlements

DISPLAY 3 1

LIMITS

Transfer Limits

Account	Entry/Transaction	Entry/Day	Max # Per Day
Overall Combined Limits	99,999,999.99	999,999,999.99	999

Go to Limits

Cancel BACK **SAVE**