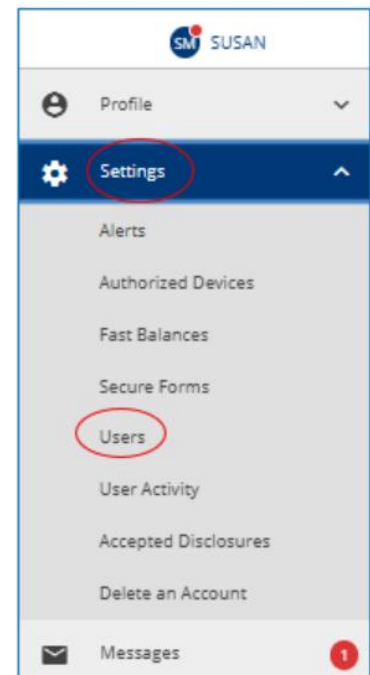


Purpose: This *QUICK REFERENCE* Guide was created to help you manage **Business Users**

Logging in to Digital Banking

- a. Select your profile name at the top right side of the homepage
- b. Select “Settings”
- c. Select “Users”



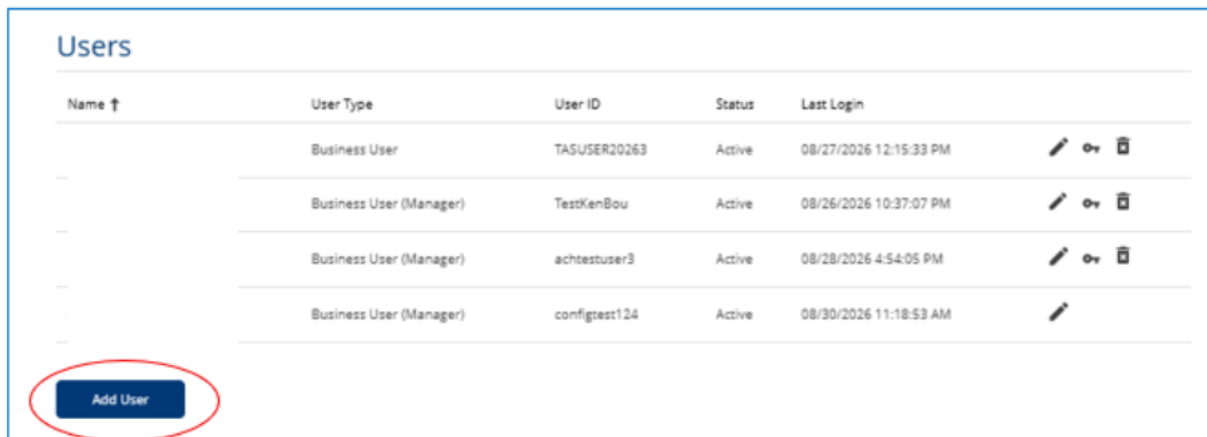
Adding New Users

- 1** Select the “Add User” button on the “Users” home page
- 2** Enter the user’s information in the required fields on the “User Details” screen

- a. User ID ***enter user id requirements Not Case Sensitive (9 – 26 characters must not contain the users name)
- b. Temporary Password (12 – 32 characters and must contain lower and upper case letter, a numerical digit and a special character)
- c. Confirm Password

- d. Confirm Status is set to “Active”
- e. First and Last Name
- f. Email address
- g. Mobile Phone
- h. Complete other fields, as necessary

3 Select “Save”



Users					
Name ↑	User Type	User ID	Status	Last Login	
—	Business User	TASUSER20263	Active	08/27/2026 12:15:33 PM	  
—	Business User (Manager)	TestKenBou	Active	08/26/2026 10:37:07 PM	  
—	Business User (Manager)	achtestuser3	Active	08/28/2026 4:54:05 PM	  
—	Business User (Manager)	configtest124	Active	08/30/2026 11:18:53 AM	



4 Set entitlements for the user

- a. Select the “Copy Entitlements from” drop-down menu to copy entitlements from an existing user, if applicable.
- b. Check/Uncheck appropriate Entitlement permissions.
 - Accounts
 - ACH
 - Bill Pay
 - Transfers
 - Wire

5 Select “Save”

QUICK REFERENCE MANAGING USERS

User Details

User ID:

Temporary Password:

Confirm Password:

Status: ☒ Active ☐ Disabled ☐ Locked

Personal Information

Title (Optional):

First Name:

Middle Name (Optional):

Last Name:

Suffix (Optional):

Birth Date (Optional):

Social Security Number (Optional):

Contact Information

Email Address:

Home Phone (Optional):

Mobile Phone:

Work Phone (Optional):

Home Address

Address Line 1 (Optional):

Address Line 2 (Optional):

City (Optional):

State (Optional):

ZIP Code (Optional):

Entitlements For GEORGE WASHINGTON

Copy Entitlements From:

Entitlement

Accounts ☒

Request Checks ☐

Merchant Service Options ☐

Positive Pay ☐

Stop Payments ☒

ACH ☐

Entitlements

Manage Users ☐

Transfers ☒

Maximum Transaction Limit \$

Maximum Daily Limit \$

Unlimited and External Transfer Per Transaction Stop-up Challenge Threshold \$

Allow Transfers without a Template ☒

Assess and Report ☒

Wires ☐

units

	ACH Entitlements	ACH Payments	ACH Payments	ACH Payments	ACH Payments	ACH Payments	ACH Payments	ACH Payments	ACH Payments
Checking	☒	☒	☒	☒	☒	☒	☒	☒	☒
BUSINESS CHECKING (01)	☐	☐	☐	☐	☐	☐	☐	☐	☐
BUSINESS CHECKING (02)	☐	☐	☐	☐	☐	☐	☐	☐	☐
FREEDOM CDS	☐	☐	☐	☐	☐	☐	☐	☐	☐
PERSONAL SAV	☐	☐	☐	☐	☐	☐	☐	☐	☐
10checkings	☐	☐	☐	☐	☐	☐	☐	☐	☐
Checking@kkr	☐	☐	☐	☐	☐	☐	☐	☐	☐
REGULAR SAVINGS - PERSONAL	☐	☐	☐	☐	☐	☐	☐	☐	☐
370 COM Loan - UNSECURED	☐	☐	☐	☐	☐	☐	☐	☐	☐

Profiles

COMBIO DIGITAL TEST INC (Business) ☐

Editing User

- Select the “Edit” (pencil) icon on the “Users” homepage for the desired user.
- Edit entitlements, as necessary.
- Select “Save.”

Editing Entitlements

- Select the “Key” icon on the “Users” home page for the desired user.
- Edit the entitlements, as necessary.
- Select “Save”

Deleting Users

- Select the “Delete” (trashcan) icon on the “Users” home page for the desired user.
- Select “OK” on the confirmation popup.

