

[Business Banking Administrator's Quickstart Guide](#)

This document is intended for someone with certain rights in business online banking. In our online banking system, we refer to an “Administrator” as someone who has been given the rights to perform certain tasks for the business. A signer on an account automatically has these permissions and can also designate others in the business to have specific permissions. See the “Entitlements” section for setup instructions for permissions.

Click on a link below to access the topic.

[Unlock a User](#)

[Create New User](#)

[Deactivate User](#)

[Create a New Password](#)

[User Permissions](#)

[Entitlements](#)

[Reporting](#)

Unlock a User

If a user in your business is locked out, you will be able to see that they are locked out, but will not be able to unlock them. There are two choices to get them unlocked:

1. Have the user use the “Forgot Password” link on the sign in screen.



Note that their correct contact information must be in your business online banking system for them to receive the option to reset their password. Their contact information can be updated once they access the system. Call Customer Care to update a user’s information.

2. Call Exchange Bank Customer Care at 707-524-3000.

Create a New User

1. Go to *Settings > Users*.
2. Click **Add User**.
3. Required fields are marked with an asterisk.
4. Click **Save** when complete.

Deactivate User

1. Go to *Settings > Users*.
2. Click the pencil icon  to edit the User.
3. Click  in the upper right corner of the screen. Note that there is not an option to delete a user. You'll want to keep the user's records in your system for reporting purposes.

Create a New Password

The administrator cannot create or reset a password for a user. The user must do so after accessing the system.

The first time login process will require each user to set a new password. Note that the password used in our previous online banking system can be used in this new system.

Users can also reset their password at any time going to *Settings > Security Preferences > Change Password*. The password security requirements are shown on the reset password screen.

User Permissions

Every user has an individual set of rights, including:

- Rights to create payments and templates of specific Transaction Types.
- Limits on the transactions the user can approve.
- Rights to access specific accounts.
- Rights to features in online and mobile banking.
- Transaction view capabilities.

These rights control what each user can do in online and mobile banking. Manage these rights by giving users the permissions that they need to perform their jobs.

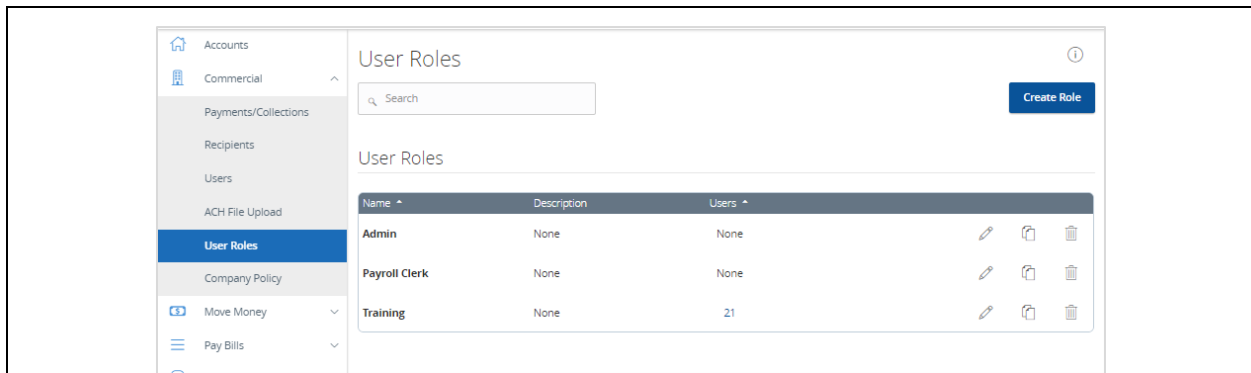
The rights, features, and accounts assigned to the Business user you create for your business are driven by your needs and factors such as the business structure, number of owners, and number of employees.

The following topics may not be applicable to all businesses in online banking. If you would like to request access to this functionality, please contact us.

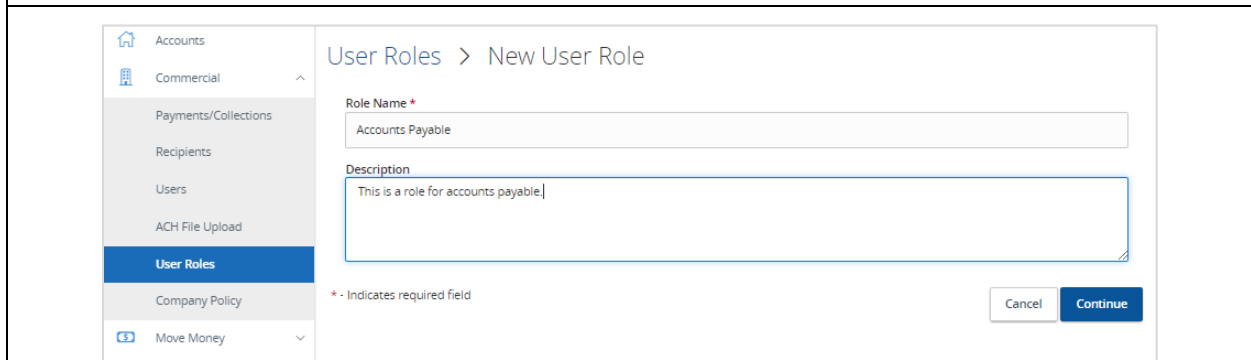
Entitlements

For business types that have the "Corporate" functionality, you have the opportunity to assign users to roles. This allows you to set up permissions by role, then assign users to that role.

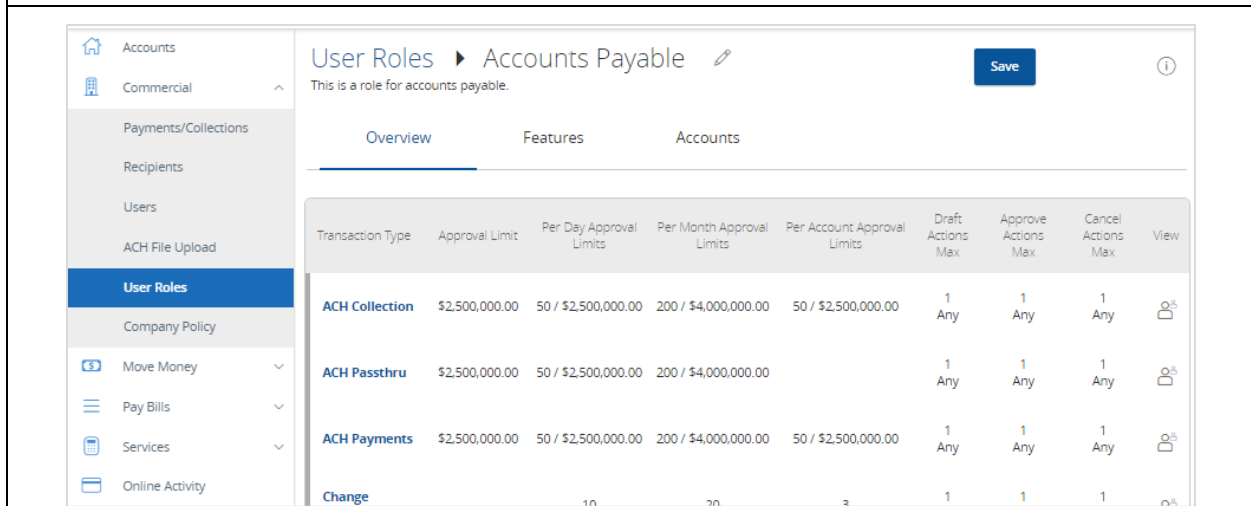
Create new Role



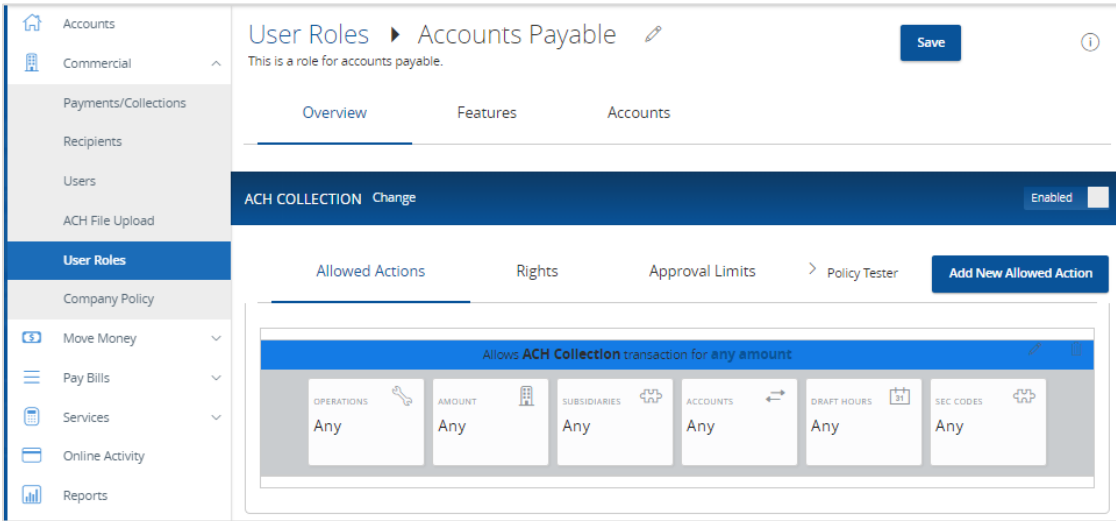
1. Go to *Commercial > User Roles*. Click **Create Role**.



2. Enter the name for the role and a description. Click **Continue**.



3. A list of all the access options and limitations will show. Click on a *Transaction Type* to make changes to the standard permissions for this role.



4. Click on any of the squares to make changes to each category. You can also click on the headings to make changes to *Rights* and *Approval Limits*. Click **Add New Allowed Action** to add additional permissions or limitations.
5. After setting the desired permissions, use the *Policy Tester* to enter a sample transaction to ensure the settings were saved appropriately.

Reporting

Reporting will be available to you according to your online banking setup. To add or change reporting options, please contact us.

To access reports, click **Reports** on the left side navigation bar.