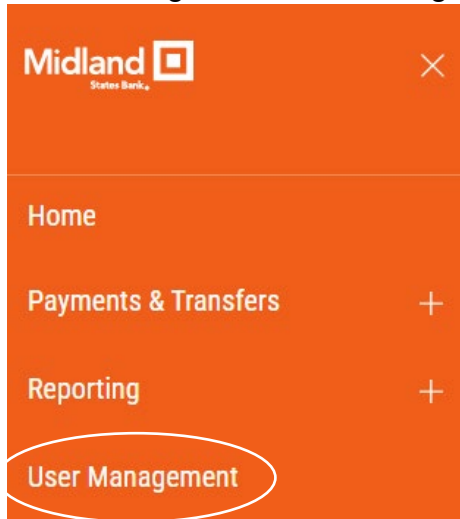
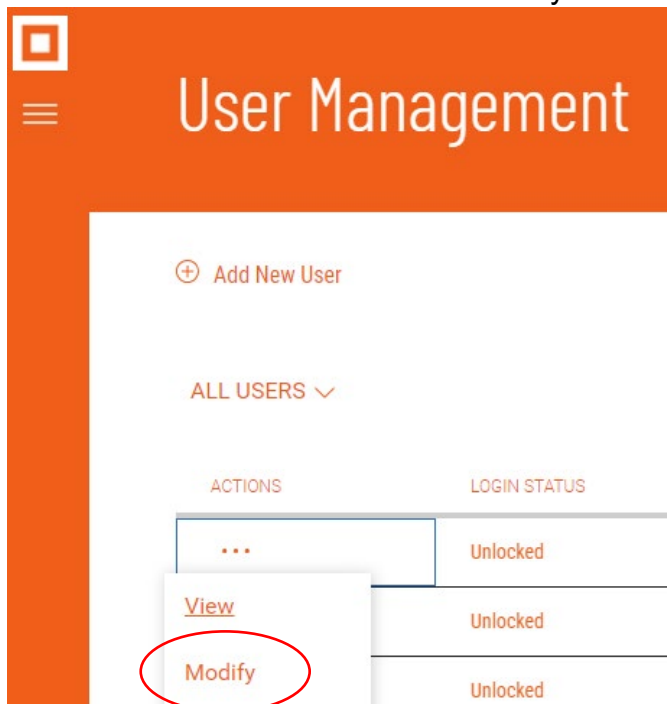


Walkthrough Guide: How to give authorized sub-users access to loan accounts in Business Online Banking.

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

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.

Cancel **NEXT**

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 **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**