

As a Company Administrator you must log-in into your new Online Banking (OLB) and follow these steps to give account rights to allow the other employees or Sub-users to be able to perform specific Online Banking actions.

1. As the Company Administrator, log-in to your own Online Banking session.
2. Go to the “Administration” option located in the horizontal bar toward the top of the screen. Scrolling over this heading, you should see a drop-down menu appear.

Accounts ▾Payments and Transfers ▾Positive Payment ▾Administration ▾Customer Service ▾

Accounts Overview

Print-friendly view

New messages: 0

Welcome: XXXX, the last time you signed on was: XXXX at 1:04 PM Eastern Standard Time. Your last failed sign on was: XXXX at 7:35 PM Eastern Standard Time.

Hide or show accounts

Assets

Account Name	Number	Available Balance	Current Balance	As Of Date
Checking- XXXX	XXXXXX	1,000.00	1,000.00	xx/xx/xx
Checking- XXXX	XXXXXX	1,993.75	1,993.75	xx/xx/xx
Checking- XXXX	XXXXXX	0.00	0.00	xx/xx/xx
Operating Account- XXXX	XXXXXX	1,000.01	1,000.01	xx/xx/xx

Click the column links to display your accounts in ascending or descending order.

[How Do I...](#)

3. Under “Administration User” choose the “Company Admin” option. Click “View” for the sub-user in order to add their account rights.

Accounts ▾Payments and Transfers ▾Positive Payment ▾Administration ▾Customer Service ▾

Company Administration

PRINT

Portfolio

Statement Preferences

Users [Create a New User](#)

Username	Last Name	First Name	Administrator	Locked	
XXXXXX	XXXXXX	XXXXXX	No	No	View
XXXXXX	XXXXXX	XXXXXX	Yes	Yes	View
XXXXXX	XXXXXX	XXXXXX	Yes	No	View

Accounts

Account Number	Account Type	Status	External	ACH Credit Limit	ACH Debit Limit	Wire Limit	
XXXXXX	Checking	Active	No				View
XXXXXX	Checking	Active	No				View
XXXXXX	Checking	Active	No				View
XXXXXX	Checking	Active	No				View

4. This will bring you to the “Manage User” screen. All of the Company’s accounts will be listed. Now choose the account that you would like this user to have access to and click the “Access” link next to that account.

Accounts ▾

Payments and Transfers ▾

Positive Payment ▾

Administration ▾

Customer Service ▾

Manage User 

PRINT

[Company Admin](#)

Username
XXXXXX

Address
XXXXXX
P.O. Box Whatever
Rocky Mount, NC 27804

[Modify](#)
[Change Password](#)
[Lock User](#)
Reset Failed Logins
Clear Password Reset Failures
[Reset PassMark](#)
SSO User Info
Security Token Required ☐ Reset Token

Accounts

Account Number	Account Name	Account Type	Account Reporting	Information Reporting	Account Transfer	Dynamic Transfers	External Transfer	ACH	Wire Transfer	Bill Pay	Positive Pay	Stop Pay	Alerts	Services
XXXXXX	XXXXXX	Checking	Access	Limits	✓		✓	✓	✓	✓	✓	✓	✓	✓
XXXXXX	XXXXXX	Checking	Access	Limits	✓		✓	✓	✓	✓	✓	✓	✓	✓
XXXXXX	XXXXXX	Checking	Access	Limits	✓		✓	✓	✓	✓	✓	✓	✓	✓
XXXXXX	XXXXXX	Checking	Access	Limits	✓		✓	✓	✓	✓	✓	✓	✓	✓

5. Begin granting access to accounts by choosing a heading tab like “Account Reporting” for example.

Accounts ▾

Payments and Transfers ▾

Positive Payment ▾

Administration ▾

Customer Service ▾

Manage User Access 

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[User Detail](#)

User Name XXXXXX

Account Name XXXXXX

Account Type Checking

Account Reporting

[Account Reporting](#)

[Information Reporting](#)

[Account Transfer](#)

[Dynamic Transfers](#)

[External Transfer](#)

[ACH](#)

[Wire Transfer](#)

[Bill Pay](#)

[Positive Pay](#)

[Stop Pay](#)

[Alerts](#)

[Services](#)

[Check All](#)

[Uncheck All](#)

☐ Account Balance

☐ Account History

☐ Change Address

☐ Statement Delivery Preference

☐ View Check Image

☐ View Statement

Save Changes

6. Then, to allow this user access to these functions you can either use the “Check All” link or check items individually. The action of checking the Account Balance box, for example, will allow this user to see the balance of this account when they log-in.

7. Please click “Save Changes” for the edit(s) you make to take effect. The “Save Changes” button must be pressed after you are finished with editing each specific tab. You should see a “Data saved successfully.” message on the screen.

8. You should continue moving through the tabs to allow access to all items/actions the user should be authorized to perform. For example, if the user needs to initiate ACH and Wires, then you would check the corresponding boxes for each tab or use the “Check All” feature.
9. Remember, these steps must take place for each account that the user needs to have access to. Each user can be enabled/disabled to use each account and perform each function for each account. If the box is checked then that specific action is enabled for that user. If the box is unchecked then the specific action is disabled for that user.
10. Continue to edit each user in this manner until each user has access to the correct accounts and items/actions that they should have.