



EASTERN BUSINESS BANKING®

USER MAINTENANCE

Quick Reference Guide

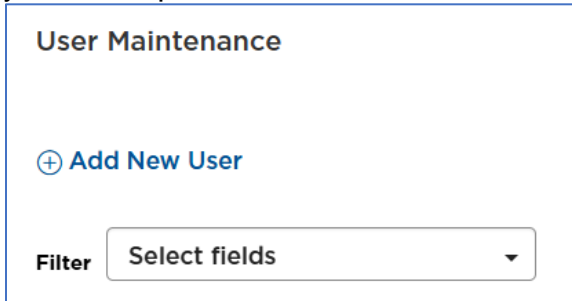
May 2025

USER MAINTENANCE

You can manage users from the **User Maintenance** widget. The widget allows you to add, view, modify, and delete users as well as maintain the features and functions that users have access to.

ADDING A USER

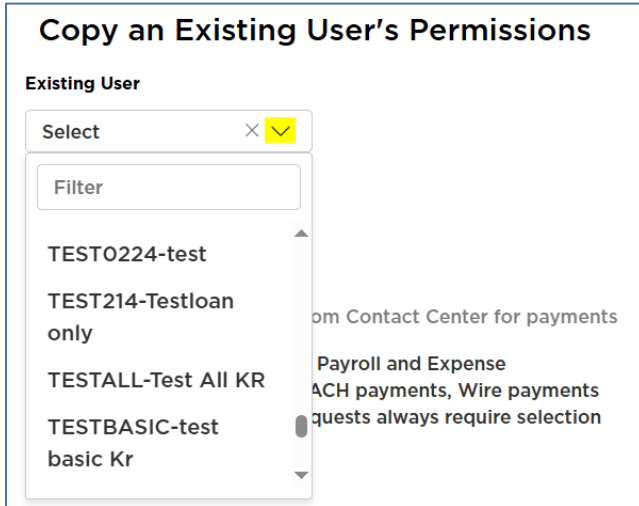
1. From the **User Maintenance** widget, click **Add a New User**. If the User Maintenance widget is not visible, use the **Add Widgets** drop-down menu to select it, and add it to the bottom of your workspace.



2. Enter a **User ID**.
3. Enter a **User Name**.
4. Enter the user **Email address**.
5. (optional) Enter a **Business Phone Number**.
6. (optional) Enter a **Mobile Phone Number**, if applicable.
7. Select the user's **Time Zone**.
8. Check the **Mobile User** box if you want this user to be able to use the mobile app.
9. Enter a temporary **Password**.
10. Enter the password again in the **Repeat New Password** text box.

A screenshot of the 'User Information' form. The form is titled 'User Information' and is located in a sidebar. The form fields include: 'User ID' (text box with 'USER123'), 'Email' (text box with 'user123@test.com'), 'User Name' (text box with 'Test Account'), 'Business Phone' (text box), 'Mobile Phone Number' (text box), 'Language' (dropdown menu with 'English (United St...)', 'Time Zone' (dropdown menu with 'EST US/Eastern'), 'Challenge Method' (dropdown menu with 'One time passcode'), 'Clear one time passcode delivery channels' (checkbox), 'Password' (text box with '*****'), 'Repeat Password' (text box with '*****'), 'Legal Administrator' (checkbox), 'Mobile User' (checkbox, checked), 'Disable User' (checkbox), and 'Clear security questions' (checkbox). A sidebar on the right contains a list of navigation options: 'User Information', 'Other Company Information', 'Permissions', 'Approvals', 'Assign Accounts', 'Additional Bank Services', and 'Audit'.

11. If you want to assign an existing user's permissions to this new user, use the **Existing User** dropdown to select a user.



Copy an Existing User's Permissions

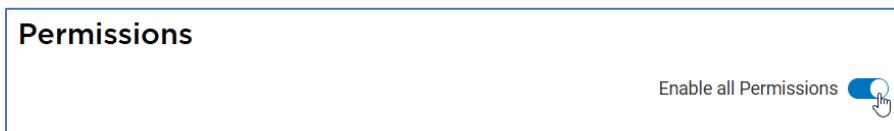
Existing User

Select

Filter

- TEST0224-test
- TEST214-Testloan only
- TESTALL-Test All KR
- TESTBASIC-test basic Kr

12. In the Permissions section, check the box(es) for the permissions you would like to grant. You can select all permissions by clicking the **Enable all Permissions** button.



Permissions

Enable all Permissions

- If you choose **Select All Permissions**, you may wish to deselect **Require approval from another user**. This will allow the user to process payments without requiring a different user to approve the payment before it is processed.
 - Special consideration should be given when selecting the **User is an Administrator** permission. This permits this User Maintenance function where the user can grant permissions, accounts and limits beyond those assigned to them.
13. In the **Approvals** section, Limits are used to define overall dollar limits for transfers, wires and ACH transactions. These can be set at a daily cumulative or individual transaction limit.

Approve Permissions and Limits Enable All

Approve Payments

This permission allows the user to approve Wire - International, Wire - Domestic, Payroll Template, Tax Payments, Recurring Corporate Collections, Recurring Consumer Payments, Payroll, Corporate Collections, Corporate/Vendor Payments, Consumer Payments, Child Support Payments Template, Recurring Wire - Domestic Payments, Recurring Corporate/Vendor Payments, Recurring Wire - International Payments, Child Support Payments, Tax Payments Template. Alerts included with this permission are the Payments Awaiting My Approval, Approver Rejected, Payment Processed, Payments Rejected Today, Approval Window Passed, Templates Awaiting My Approval. [Less](#)

	Daily	Transaction	Batch
Pay Employees	<input type="text" value="99999"/>	<input type="text" value="9999"/>	<input type="text"/>
Electronic Payments	<input type="text"/>	<input type="text"/>	<input type="text"/>
Expedited Payments	<input type="text"/>	<input type="text"/>	

Approve Account Transfers

This permission allows the user to approve Transfer Payments, Recurring Transfers. Alerts included with this permission are the Payments Awaiting My Approval, Approval Window Passed, Approver Rejected, Payments Rejected Today, Payment Processed, Templates Awaiting My Approval. [Less](#)

	Daily	Transaction
Account Transfers	<input type="text" value="99999"/>	<input type="text" value="9999"/>

14. In the **Assign Accounts** section, select the accounts the user will have access to. If you want to assign all company accounts to this user, check the Assign All Accounts box. . If you check this box, the user will have access to company accounts added to Eastern Business Banking in the future.

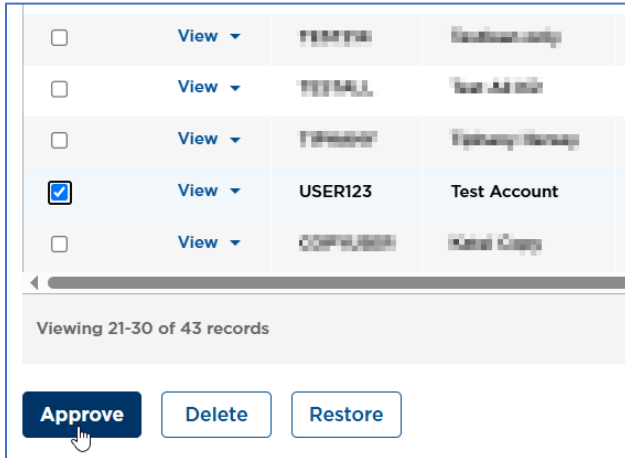
Assign Accounts

The user will have access to the accounts assigned to the specific payment type.

Assign All Current and Future Accounts
 Manually Assign Accounts

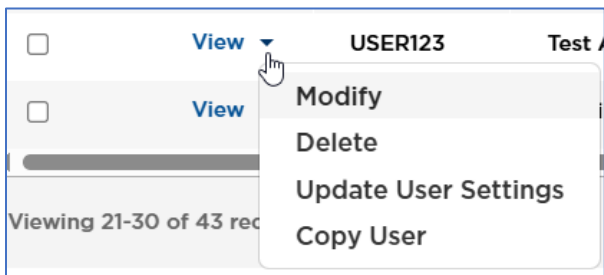
15. When complete, click **Add User**. You will see a confirmation message at the top of the screen and the user will appear in the **User Maintenance** widget in **Entered** status.

16. In the **User Maintenance** widget, click the applicable **checkbox** to **select** the user and click **Approve** to approve this user.



MODIFYING A USER

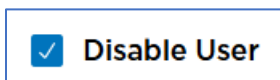
1. In the **User Maintenance** widget, select the user you want to modify and click **Modify** from the **Actions** list (to access the **Actions** list, click the **arrow** next to “**view**” in the **User List**).



2. Make the desired changes to the user and click **Update**.
3. You will receive a confirmation message and the user will appear in the User Maintenance widget in **Modified** status. Select the user and click **approve**.

DISABLING A USER

1. In the **User Maintenance** widget, select the user you want to disable and click **Modify** from the **Actions** list.
2. Check the **Disable User** box and then click **Update**.



3. You will receive a confirmation message and the user will appear in the User Maintenance widget in Disabled status.

ENABLING A USER

1. In the **User Maintenance** widget, select the user you want to enable and click **Modify** from the **Actions** list.
2. Uncheck the **Disable User** box and then click **Update**.
3. You will receive a confirmation message and the user will appear in the User Maintenance widget in Modified status. Select the user and click **approve**.

DELETING A USER

1. In the **User Maintenance** widget, select the user you want to delete and click **Delete**.
2. You will receive a message to confirm you wish to delete the user. Click **Yes**.

Confirm Delete

Are you sure you want to delete this item?

3. You will receive a confirmation message, and the user will appear in the User Maintenance widget in Deleted status.