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 New User. If the User Maintenance widget is not visible, use the Add Widgets drop-down to select it and add 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.
11. If you want to assign an existing user’s permissions to this new user, use the Existing User drop-down to select a user.

12. In the Permissions section, check the box(es) for the permissions you would like to grant. You can select all permissions by checking the Select All Permissions box.

- 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 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.

14. Use the Limits section to define overall dollar limits for transfers, wires and ACH transactions. These can be set at a daily cumulative or individual transaction limit.

15. When complete, click Add User. You will receive a confirmation message and the user will appear in the User Maintenance widget in Entered status.

16. In the User Maintenance widget, select the user and click Approve from the Actions list 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.

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. Click Approve from the Actions list to approve the modifications to this user.

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. Click Approve from the Actions list to approve the modifications to the user.

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.
3. A confirmation message will appear and the user will appear in the User Maintenance widget in Deleted status.