

Treasury Management

Business Online Banking

- **Adding New Users**



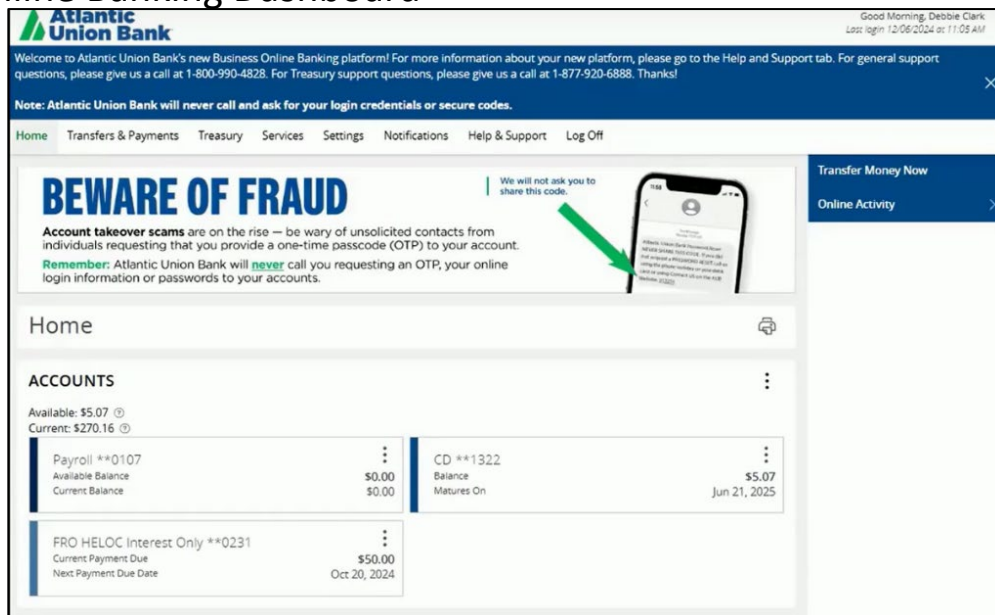
Business online banking – Adding New Users

User Guide

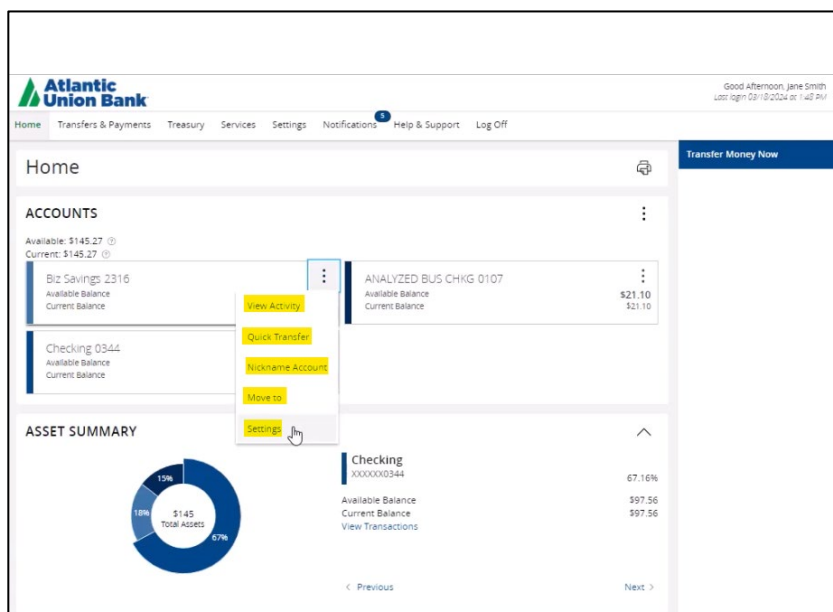


Log into Online Banking

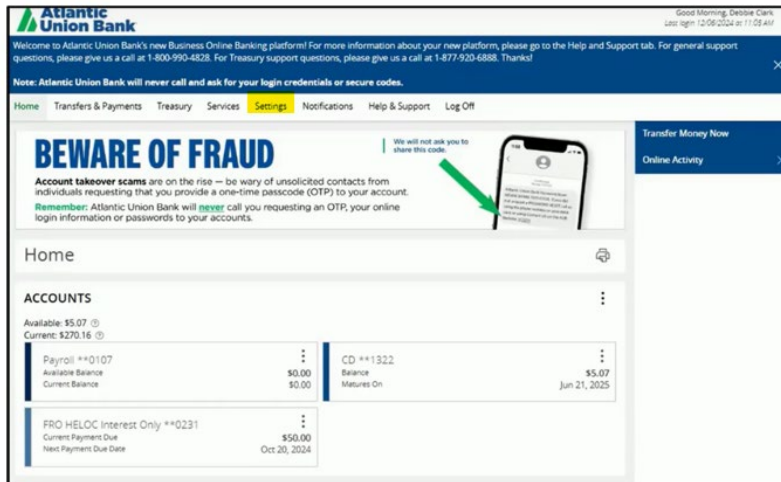
Online Banking Dashboard



The homepage has a listing of accounts that the user has access to within online banking



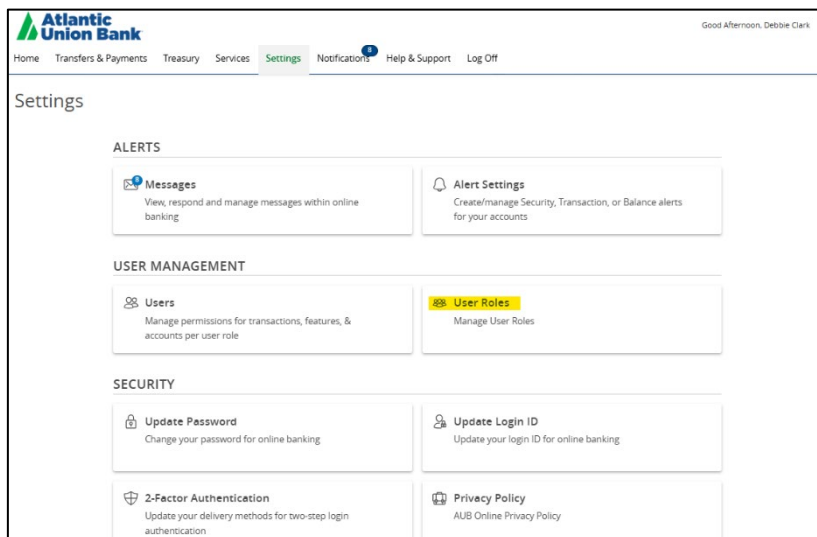
Adding New Users (Administrators only)



In the navigation bar select “Settings”

There are 2 sections that you will need to fully complete set up for new users.

“User Roles” and “Users”



select the tile for “User Roles”

Atlantic Union Bank

Home Transfers & Payments Treasury Services Settings Notifications 1 Help & Support Log Off

User Roles ⓘ

Search

USER ROLES

Create Role

Name Description Users

Add new username and “Create Role”

New User Role

Role Name

New User

Description (optional)

Cancel Ok

There are 3 sections that need to be completed for the user below:

1. Transactions—select transactions and enable, complete dollar limits for user, then save

User Roles > Demo User

User Role Policy ⓘ

Transactions Features Accounts

Filter: All Enabled Disabled

ACH Collection Can view own transactions \$0.00

ACH Pass Thru Disabled

ACH Payments Can view own transactions \$1.00

Domestic Wire Disabled

EFTPS Disabled

Funds Transfer Can view account transactions Can Draft/Approve/Cancel \$999,999,999.99

ACH PAYMENTS

Enabled

View Own

Approval Limits

Maximum Amount Maximum Count


Per Transaction \$ 1.00


Daily Per Account \$ 0.00 0

Daily \$ 0.00 0


Monthly \$ 0.00 0

2. Select each Feature that the new user will need access to and “Save”

User Roles > Demo User  Delete Save

User Role Policy 

Transactions Features Accounts

FEATURES 

RIGHTS

<input checked="" type="checkbox"/> Access Incoming/Outgoing Wire Alerts	<input checked="" type="checkbox"/> Access to all payment templates
<input checked="" type="checkbox"/> Allow one-time recipients	<input checked="" type="checkbox"/> Can view all recipients
<input checked="" type="checkbox"/> Enable Centrix Positive Pay	<input checked="" type="checkbox"/> Manage Recipients
<input checked="" type="checkbox"/> Manage Users	<input checked="" type="checkbox"/> Recipient upload from batch
<input checked="" type="checkbox"/> Statement Image	<input checked="" type="checkbox"/> View Wire Activity
<input checked="" type="checkbox"/> Wire upload from batch (requires Multi-Wire)	


TRANSACTIONS


<input checked="" type="checkbox"/> Allow ACH Company Entry Description Entry

CUSTOM FEATURES


<input checked="" type="checkbox"/> Branch Business Enrollment	<input checked="" type="checkbox"/> Loan Payments TCT
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3. Accounts – select the accounts that the new user will need access to and “Save”.

User Roles > Demo User  Delete Save

User Role Policy 

Transactions Features Accounts

ACCOUNTS 

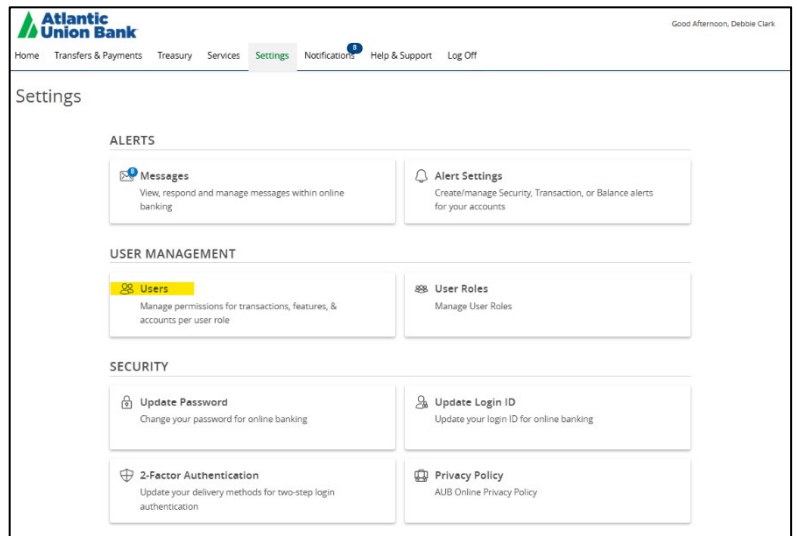
3 of 3 accounts shown

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>	Labels
XX0231	FRO HELOC Interest Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
XX0107	Payroll	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
XX1322	CD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Delete Save



Go back to “Settings” and
Select the tile for “Users”



The screenshot shows the Atlantic Union Bank New User Details form. The form is divided into two main sections: PERSONAL DETAILS and LOGIN DETAILS. In the PERSONAL DETAILS section, the First Name is 'New', Last Name is 'User', and Email Address is 'debra.clark@atlanticunionbank.com'. In the LOGIN DETAILS section, the Login ID is 'NewUser', Password is '*****', and Confirm Password is '*****'. The User Role dropdown is set to 'Demo User'. At the bottom of the form, there are two buttons: 'Discard New User Details' and 'Save New User Details'.

Complete new user's information
Select “User Role” previously created
and “Save New User Details”

****Email the new user their Login ID and temporary password (the system does not automatically send the user this information).**