

How to add a new business user

Streamline your business operations and register new users in Digital Banking. Only Digital Banking Admin users have the permissions required to initiate and complete the creation of new user profiles.

01 Navigate to User Management

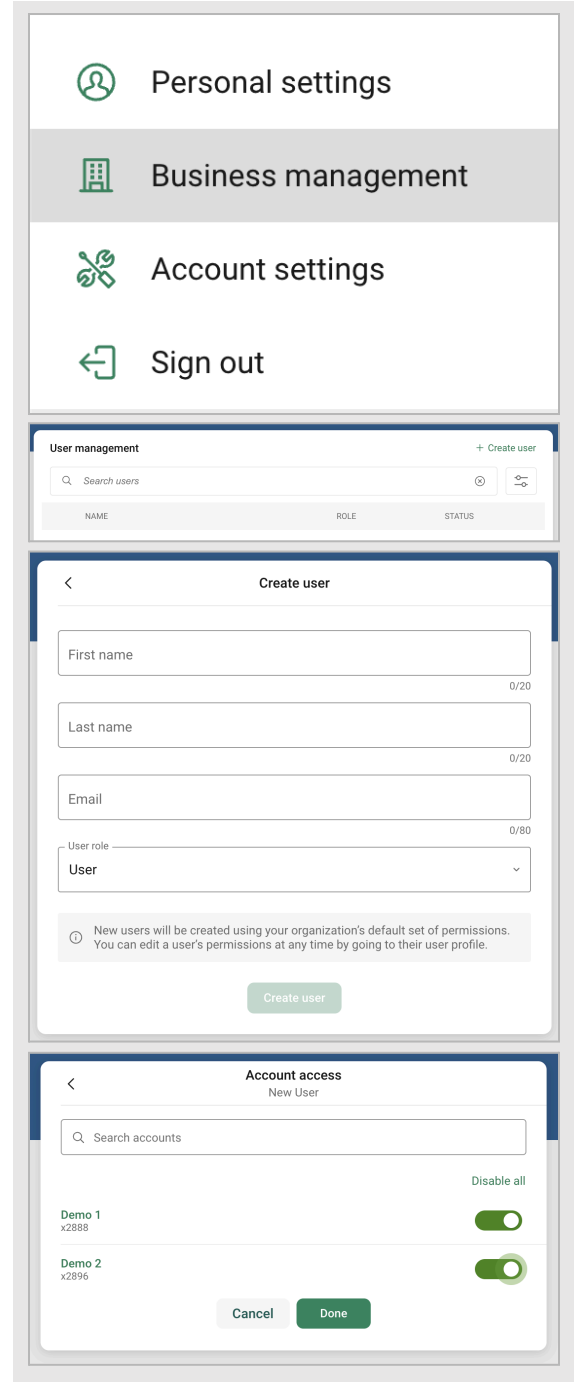
- There are two ways to access user management
 - On the right-hand side of your main dashboard, click your **User** icon, then **Settings**; or
 - In the lower left corner, toggle open your profile settings by clicking your **User** icon, and then click **Business management**
- On the left side of the Settings Dashboard, under Business management, click **User management**

02 Create User

- In the upper right corner of the User management screen, click **+Create user**
- Complete the required user information and select their User management role
 - Please note:** User management roles differ from account/service permissions. The user role only pertains to how the user will interact with other users under User management.
 - User** - no access to other users in your organization
 - Viewer** - view only access other users in your organization
 - Admin** - Will have full access to create and modify other users in your organization
- Click **Create user**

03 Enable Accounts

- Click **Select** to enable account access
- Toggle the specific accounts you wish to grant access to for this user and click **Done**
- Click **Enable accounts**
- Click **Send email invite** for the user to accept and create their Digital Banking credentials



The image displays three sequential screenshots of the MainStreetBank digital banking interface:

- Top Screenshot:** Shows the main dashboard with a sidebar on the left containing 'Personal settings', 'Business management' (highlighted), 'Account settings', and 'Sign out'.
- Middle Screenshot:** Shows the 'User management' screen. It includes a search bar, a table with columns 'NAME', 'ROLE', and 'STATUS', and a '+ Create user' button in the top right corner.
- Bottom Screenshot:** Shows the 'Create user' form. It contains input fields for 'First name', 'Last name', and 'Email', each with a character count (0/20, 0/20, 0/80 respectively). There is a 'User role' dropdown menu currently set to 'User'. A note states: 'New users will be created using your organization's default set of permissions. You can edit a user's permissions at any time by going to their user profile.' A 'Create user' button is at the bottom.