

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

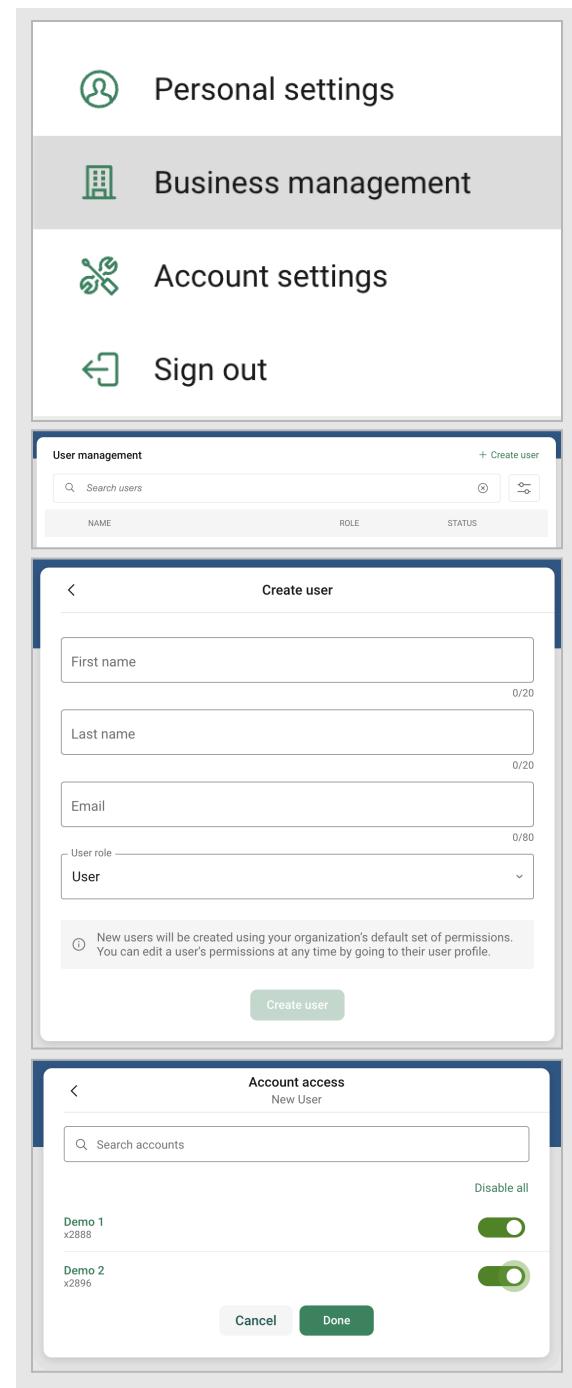
- There are two ways to access user management
 - On the right-hand side of your main dashboard, click your **User** icon, then **Settings**; or
 - In the lower left corner, toggle open your profile settings by clicking your **User** icon, and then click **Business management**
- On the left side of 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 screenshots of the MainStreetBank Digital Banking interface for User Management:

- Top Panel:** Shows a sidebar with icons for Personal settings (User icon), Business management (Building icon, highlighted in grey), Account settings (Wrench icon), and Sign out (Logout icon).
- User management screen:** A table titled "User management" with columns for NAME, ROLE, and STATUS. A search bar and a "Create user" button are at the top. A note at the bottom 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."
- Create user screen:** A form titled "Create user" with fields for First name, Last name, Email, and User role (set to "User"). A note at the bottom is identical to the one above. A "Create user" button is at the bottom right.
- Account access screen:** A table titled "Account access" for "New User" with a "Search accounts" bar. It lists "Demo 1 x2888" and "Demo 2 x2896", each with a green toggle switch. Buttons for "Disable all", "Cancel", and "Done" are at the bottom right.