

How to update business user permissions

Update new and existing user permissions directly through Digital Banking within Business management. For a full list of permissions and what they mean, see our guide on **Business user permissions defined**.

01 Navigate to User Profile

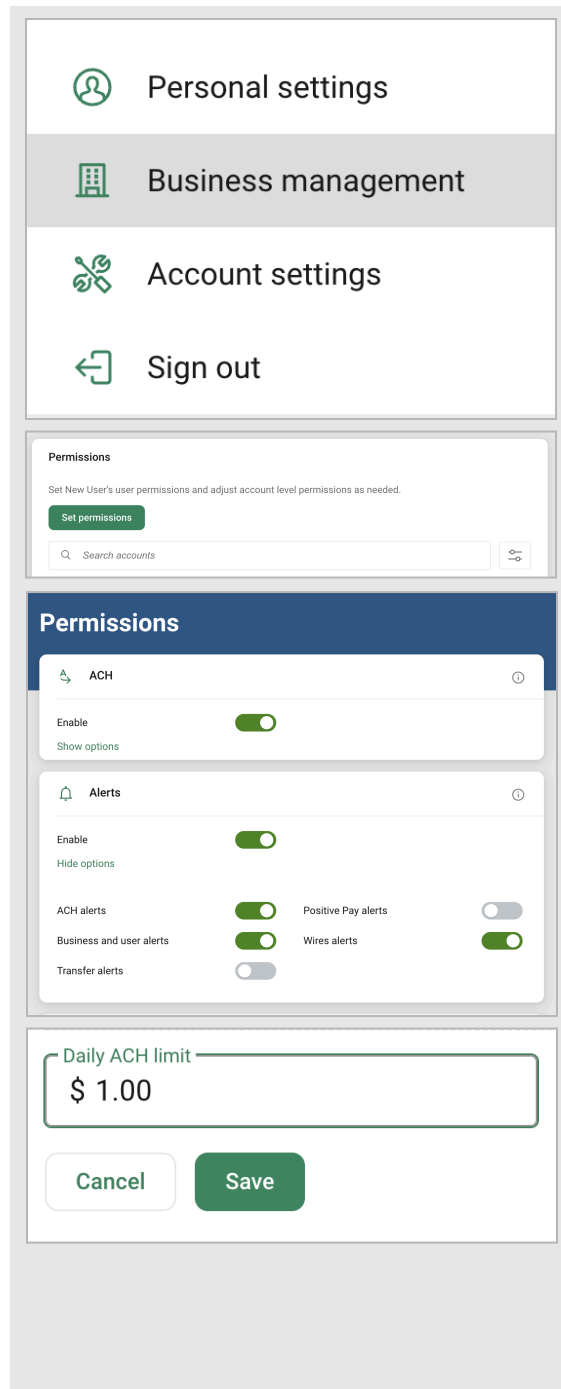
- There are two ways to access user management
 - On the right-hand side of your main dashboard, click your **User** icon, then **Settings**; or
 - In the lower left corner, toggle open your profile settings by clicking your **User** icon, and then click **Business management**
- On the left side of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

02 Set User Permissions

- In the center of the user profile screen, click **Set permissions**
- Scroll through the available permissions and toggle each permission you wish to enable for the user
- As you toggle each parent permission, it will automatically expand showing additional options for you to select in order to customize the user's permissions
 - As soon as a permission is toggled, it automatically saves
- Enter any required service limits for the user
 - Click **Save** for each limit entered
- Click the back arrow next to the user's name to go back to the user profile screen

03 Enable Additional Services

- If your business is enrolled in additional services, toggle each service you wish to enable for the user under **Additional services**
 - **Please note:** This only enables the link to the service within Digital Banking. If you wish to update a user's permissions within the service, please contact us for assistance



The screenshot displays the 'Permissions' settings page for a business user. At the top, there is a navigation menu with options: 'Personal settings', 'Business management' (which is highlighted), 'Account settings', and 'Sign out'. Below this, a 'Permissions' section contains a 'Set permissions' button and a search bar labeled 'Search accounts'. The main content area is titled 'Permissions' and lists several categories with toggle switches: 'ACH' (toggled on), 'Alerts' (toggled on), 'ACH alerts' (toggled on), 'Business and user alerts' (toggled on), 'Transfer alerts' (toggled off), 'Positive Pay alerts' (toggled off), and 'Wires alerts' (toggled on). At the bottom, there is a 'Daily ACH limit' section with a text input field showing '\$ 1.00' and two buttons: 'Cancel' and 'Save'.