

# Tips for managing online access to your business accounts in the Admin Console

The **Admin Console** allows you to add and delete users (such as your bookkeeper or accountant) and manage their account access.

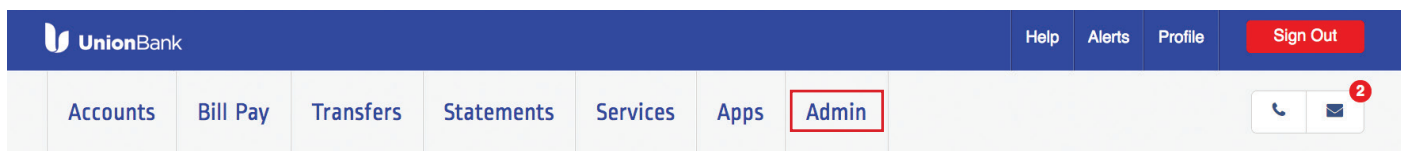
**It's important to always have one active Web Admin who can use the Admin Console to manage user access.**

When there is Officer turnover, it's best for the current Web Admin to create a new Web Admin in the Admin Console before becoming inactive.

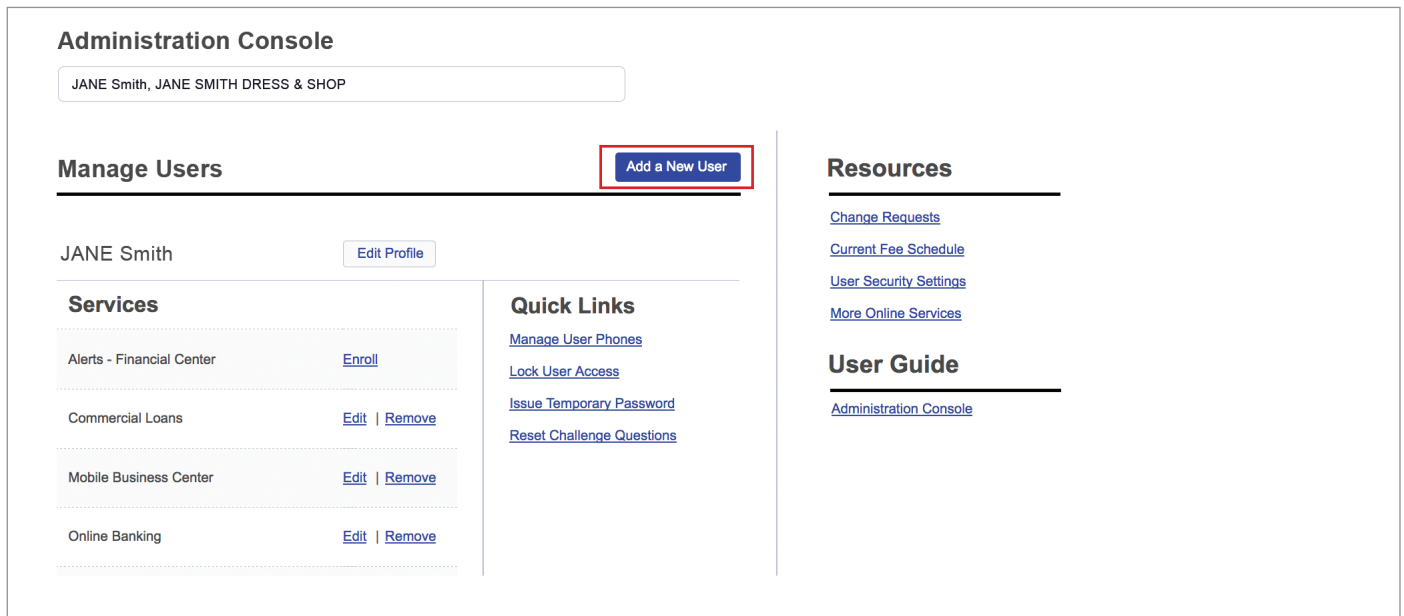
If it's not possible for the existing Web Admin to create a new Web Admin, your branch can submit a request on your behalf. The Contracting Officer or Owner and Secretary for Corporations will need to sign the "Add, Remove, Change a User Authorization in Online Banking for Small Business" form. It will take 1 business day to update the users' access.

## Steps to create a new Web Admin:

- 1 Sign on to Online Banking
- 2 Select the Admin tab from the top navigation bar:



- 3 Select Add New User



**4 Create the New User**

### Create a New User

JANE Smith, JANE SMITH DRESS & SHOP

Please complete the information below and click 'Submit' to create a new User. You can copy another user's entitlements and grant them to the new user, or enroll the new user in each service individually. \* Denotes a required field.

\* User ID :  [Check Availability](#)

\* First Name :

Middle Name :

\* Last Name :

\* Work Number :    ext. :

Mobile 1 :

Use for Alerts

\* Email :

\* Confirm Email :

\* Mother's Maiden Name :

\* City of Birth :

User Type ? :  Web User  
 Web Admin

Copy another User's entitlements? :  Yes  No

Send High Risk Transactions email

Notify user by email about offers, promotions, and new products

User ID must be a minimum of 7 and no greater than 32 letters and numbers, no special characters (!, @, #, \$, %, &).

When you create a new User, an email message will be sent notifying the User of only the temporary password. For security purposes, the User ID created for the new user should be communicated separately.

[Admin Console](#)   [Reset](#)   [Submit](#)

**5 Select Web Administrator for User Type and the accounts this user should have access to:**

### Enroll User in Service

JANE Smith, JANE SMITH DRESS & SHOP

You are viewing information for **Online Banking**.

Entitlements for User ID username, username userlastname

Select the accounts for this User to access and designate an access level, then click 'Submit' to implement these changes.

Click 'Select All' to enable access to all accounts shown.

To duplicate an existing user's assigned accounts, select 'Copy Another User.' [Copy Another User](#)

**User Access**

User Type: Web Administrator ?

[Select All](#)

Account	Add Account <span style="font-size: small;">?</span>	Account	Add Account <span style="font-size: small;">?</span>
0070650363 Checking	<input checked="" type="checkbox"/>		

[Return to Admin Console](#)   [Reset](#)   [Submit](#)

**6 Communicate the new User ID to the Contracting Officer, and s/he will receive a temporary password by email. The new Contracting Officer will then be able to complete their online setup.**

Questions? Please call us at 1-800-238-4486  
 Monday-Friday: 7:00 a.m.-9:00 p.m.   Saturday: 8:00 a.m. to 5:00 p.m. (PST).