



## Reference Guide: User Setup and Management

### Purpose

Provide an overview for setting up a New User and managing Existing Users

### Setting Up a New User

1. Select Business Banking > User Management. Click **Add User**
2. Enter the users name, email and phone number
3. Create **Login ID** (must be between 6 – 18 characters)
4. Enter a **Temporary Password** in both password fields. The user will be prompted to change the password upon first login.
5. Click **Save** New User Details
6. **Permissions** will vary by service. The **Transactions** screen allows you to set permissions for the user to Draft, Approve, Cancel and/or View transactions. **Daily, Per Transaction** and **Monthly Limits** (less than your overall company limit) may also be customized. Review each service and set permissions for each of the services on the lefthand side of the screen.
7. Select **Accounts** tab to select which accounts you want the user to view, deposit to and withdraw from.
8. Select **Features** tab and enable or disable options as needed. Disabling an option will prevent the user from being able to perform the transaction type.
9. Click **Save**

### Managing an Existing User

1. Select Business Banking > **User Management**  
> Click the pencil next to the User Name.
2. Select **Assign Rights**
3. This screen allows you to add, edit or delete any existing permissions the user currently has.

### Deactivate Existing User

1. Select Business Banking > **User Management**  
> Click the pencil next to the User Name.
2. Click **Edit Status**
3. Click **Deactivate User** and the user will no longer be able to login.

#### Quick Tips

##### User Management

Found under Business Banking tab

##### Deactivating User

Business Banking tab > User Management  
> Edit Status > Deactivate User

##### Reactivate User

Business Banking tab > User Management  
> Edit Status > Reactivate User

If you have any questions, contact our Customer Care Center:

1-855-275-7226 opt 3

Email: [customercare@southernbank.com](mailto:customercare@southernbank.com)