

Manage Users

Business Admins and Users show on the Manage Users screen, in alphabetical order.

- Primary Admin can edit a Secondary Admin's access.
- Secondary admins can manage other secondary admins; can only grant entitlements that they themselves have been granted.

User status descriptions:

- **Active** – user is able to access Business Banking
- ***Active with warning icon** – an Admin edited a user's profile; user remains active and can continue to log into Business Banking and perform tasks based on existing entitlements; new entitlements must be approved by another Admin.
- ***Setup Pending Approval** – an Admin added a new user; must be approved by another Admin before receiving login credentials via email
- **FI Review Pending** – applicable if your FI enables User Screening for Business Admin, Business Users, or both; it means the FI must approve new or edited users
- **On Hold** – Access toggle is set to No; user cannot access Business Banking.
- ***Update Approval Declined** – an Admin declined this user in the approval workflow

** n/a for single admin companies*

Users with Account Access					+ Add a user
Name ▼	Role	Status	Grant Access	Options	
Alexis Colby	Secondary Admin	Active	YES <input checked="" type="checkbox"/>	Options ▼	
Andre Johnson	Secondary Admin	⚠ FI Review Pending	--	Options ▼	
DI University	Primary Admin	Active			
Harley Davidson	Business User	On Hold	<input type="checkbox"/> NO	Options ▼	
Michael Jordan	Business User	⚠ Setup Pending Approval	--	Options ▼	
Tanner Winters	Business User	⚠ Active	YES <input checked="" type="checkbox"/>	Options ▼	

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Manage Secondary Admins and Business Users via the Options link.

Options for an Active User:

- **Print user details** – full printout of all the user's access and limits
- **Edit user** – change anything except the user's name
- **Copy user** – select to copy this user's permissions for a new user (shows only for the Primary Admin)
- ***Reset password** – sends a temporary password to the user's phone via call or text
- ***Generate access code** – delivers a one-time access code on the screen that the Admin gives the user if needed during login (not for payment approvals)
- **Delete user** – permanently deletes the user from Business Banking (n/a for Secondary Admins; the FI must delete them)
- Slide **Access** toggle to No to change status to Disabled (temporary hold)

Options for a Locked User – same options as above except:

- No Reset password and Generate access code options
- ***Reset password and Unlock user** – unlocks the user and sends a new temporary password to the user's phone via call or text
- ***Unlock user** – unlocks user so they can login with original password

Options show only if the FI has enabled these features for businesses

Users with Account Access

+ Add a user

Name ▼	Role	Status	Grant Access	Options
Bookkeeper Jones	Business User	On Hold	<input type="checkbox"/> NO	Options ▼
Derek Hawes	Business User	Active	<input type="checkbox"/> YES	Options ▼
Sally Burley	Business User	Active	<input type="checkbox"/> YES	Options ▼
Xavier Volf	Secondary Admin	Active	<input type="checkbox"/> YES	Options ▼

Print user access details

Edit user access

Copy user

Reset password

Generate access code

Delete user