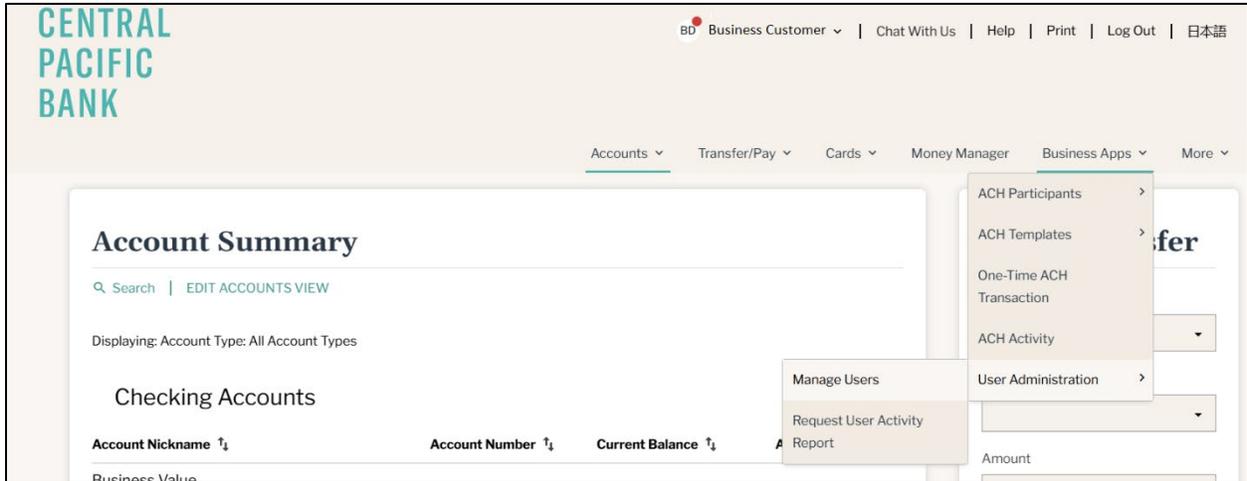


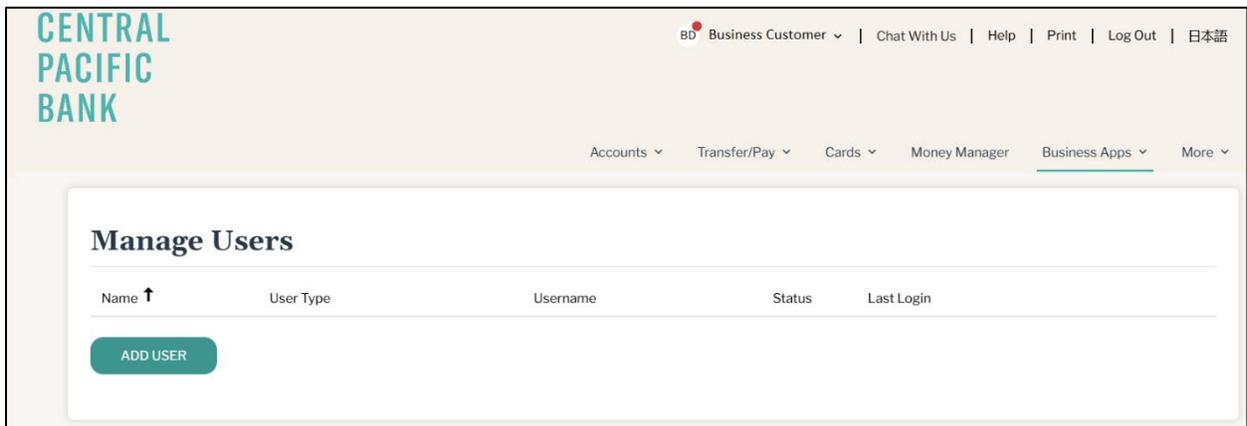
<https://www.cpb.bank/business-banking/user-management-help>

User Administration - Add a user

1. Navigate to Business Apps > User Administration > **Manage Users**



2. Click **ADD USER**:



3. Enter applicable information, keeping in mind that fields with an asterisk (\*) indicate required fields.

Username must be 8 to 25 characters long; special characters are allowed.

Passwords must be 8 to 32 characters long and must contain 3 out of the following: One uppercase letter, one lowercase letter, one number, and a special character (~!@#\$\$%^&\*()\_+={}|:;?.,/)

This user can access this account via the temporary password for 15 minutes. If the user does not log in within that time, a new password will have to be reset.

Please input at least one phone number for the new user, because the new user will need it for security purposes.

## User Details

**\* Username**

**\* Temporary Password**

**\* Confirm Password**

Status  
 Active  
  Disabled  
  Locked

### Contact Information

**\* Email Address**

**\* At least one phone number is required**

Home Phone  
 v

Mobile Phone  
 v

Work Phone  
 v

**Home Address**

Address Line 1

Address Line 2

City

State  
 v

ZIP Code

### Personal Information

Title

**\* First Name**

Middle Name

**\* Last Name**

Suffix

Birth Date  
 📅

CANCEL
SAVE

4. In the Entitlements screen, check off all the features and accounts that you want the user to have, then click Save (functions available will depend on your service plan).

**TIPS:**

- Entitlements can be copied/replicated from an existing user. (see below green-circled item)
- Please click the checkbox to expand any sections that are indicated by a >> . (see below orange-circled items)

## Entitlements For Test User

Copy Entitlements From  
 No User Selected

Entitlement	Limit	
Accounts »		<input type="checkbox"/>
ACH »		<input type="checkbox"/>
Bill Pay and Zelle®		<input type="checkbox"/>
Cards		<input type="checkbox"/>
MX MoneyDesktop Money Management		<input checked="" type="checkbox"/>
Order Checks		<input type="checkbox"/>
Quicken® / Quickbooks®		<input type="checkbox"/>
SecureNow Bypass Verification Methods		<input type="checkbox"/>
Statements		<input type="checkbox"/>
Transfers »		<input type="checkbox"/>

Accounts

All Entitlements  
 Stop Payments  
 View  
 ACH From  
 Transfer From  
 Transfer To

*Click the checkbox to expand the desired Entitlement category*

Expanded View of Entitlements (NOTE – not all entitlements may show; these are dependent on your service plan):

# Entitlements For Test User

Copy Entitlements From

No User Selected

## Entitlement

Limit

### Accounts

#### Deposit Checks

Maximum Transaction Limit \$ 10000.00

Maximum Daily Limit \$ 10000.00

Open Accounts

Stop Payments

### ACH

Per-Transaction Step-up Challenge Threshold \$ --

Review Threshold for a Credit Transaction \$ --

Formerly called "Maximum Transaction Credit"

Review Threshold for a Debit Transaction \$ --

Formerly called "Maximum Transaction Debit"

Hard Limit for a Debit Transaction

Review Threshold for a Batch Credit \$ --

Formerly called "Maximum Batch Credit"

Review Threshold for a Batch Debit \$ --

Formerly called "Maximum Batch Debit"

Number of Approvals Required

Approve and Reject

#### Authorized ACH Companies

BUSINESS COMPANY - 123456789

#### Initiate

Daily Review Threshold for User Credit Transactions (by Effective Date) \$ --

Formerly called "Maximum Daily User Credit"

Daily Review Threshold for User Debit Transactions (by Effective Date) \$ --

Formerly called "Maximum Daily User Debit"

Monthly Review Threshold for User Credit Transactions (by Effective Date) \$ --

Formerly called "Maximum Monthly User Credit"

Monthly Review Threshold for User Debit Transactions (by Effective Date) \$ --

Formerly called "Maximum Monthly User Debit"

Recurring

#### Manage Batches & Participants

Manage Denied Users

Manage Participant Distributions

Manage Restricted Batches

#### SEC Codes

PPD Credit - Consumer Credit

PPD Debit - Consumer Debit

CCD Credit - Non-Consumer Credit

CCD Debit - Non-Consumer Debit

Tax Payments

Child Support Payments

<b>Bill Pay and Zelle®</b>		<input type="checkbox"/>
<b>Cards</b>		<input type="checkbox"/>
<b>MX MoneyDesktop Money Management</b>		<input checked="" type="checkbox"/>
<b>Order Checks</b>		<input type="checkbox"/>
<b>Quicken® / Quickbooks®</b>		<input type="checkbox"/>
<b>SecureNow Bypass Verification Methods</b>		<input type="checkbox"/>
<b>Statements</b>		<input type="checkbox"/>
<b>Transfers</b>		<input checked="" type="checkbox"/>
Maximum Transaction Limit	\$ —	<input type="text" value="—"/>
Maximum Daily Limit	\$ —	<input type="text" value="—"/>
Unlinked and External Transfer Per-Transaction Step-up Challenge Threshold	\$ —	<input type="text" value="—"/>
Number of Approvals Required		<input type="text" value="0"/>
Approve and Reject		<input type="checkbox"/>
Manage External Accounts		<input type="checkbox"/>
Manage Unlinked Accounts		<input type="checkbox"/>

## Accounts

	All Entitlements	Stop Payments	View	ACH From	Transfer From	Transfer To
x1234 - Totally Free Business Checking	<input type="checkbox"/>					
x4321 - Business Super Savings	<input type="checkbox"/>					

## Profiles

	All Entitlements	Statements	Tax Documents	Bill Pay Access	Update Profile
BUSINESS COMPANY (Business)	<input type="checkbox"/>				

CANCEL

SAVE

## 5. Removing a user

If a user needs to be removed, it's important to mark the user as Disabled. This will ensure that any ACH batches the user might have created do not get cancelled.

### User Details

---

\* Username

Reset Password

Status  
 Active  Disabled  Locked

### Personal Information

Title

### Contact Information

\* Email Address

\* At least one phone number is required

Home Phone