

Welcome to Business Online Banking

Managing Sub Users

Settings

MESSAGES & ALERTS

**Alert Settings**

Manage transaction, balance and security alerts

Under the Settings menu, select
Manage Users to add a user

COMPANY ADMINISTRATION

**Policies**

Manage permissions for transactions, features & accounts at a company level

**Manage Users**

Add, modify or delete new users

SECURITY

**Update Password**

Change your password for online banking

**Update Login ID**

Update your Login ID for online banking





**Edit SAC Contacts**

Update your delivery methods for your Secure Access

User Management

You add a user using the Add User button

[Add User](#)

User ▲	Email Address ▲	Role	Status ▲	Last login ▲	
	@bankofhope.com	admin role	Active	5 months ago	
	@bankofhope.com	admin role	Active	8 minutes ago	

New User Details

Enter New User Details, then click Save New User Details

PERSONAL DETAILS

First Name**Last Name****Email Address****Phone Country****Phone**

LOGIN DETAILS

Login ID**Password****Confirm Password****User Role**[Discard New User Details](#)[Save New User Details](#)

[Home](#) [Transfers & Payments](#) [Reports](#) [Services](#) [Settings](#) [Contact Us](#) [Log Off](#)

Active

[Edit Status](#)

PERSONAL DETAILS

First Name

Last Name

Email Address

Phone Country

United States

Phone

()-

Click Manage User Roles have filled out the details.

USER ROLE

[Manage User Roles](#)

Current Role

admin role

[Update Role](#)

USER LOGINS

Login Name

Channel

Status

Last Logon

Actions





User Roles

USER ROLE TEMPLATES

USER ROLES

Click Manage User Roles have filled out the details.

[Create Role](#)

Name ^	Description	Users ^			
admin role	None	2			




User Roles

USER ROLE TEMPLATES















USER ROLES

Click on the dropdown arrow to for additional details on User Roles definitions

[Create Role](#)

Name 	Description	Users 			
admin role	None	2			

USER ROLE TEMPLATES

Name ^	Description		
Company Admin	Has access to all features, accounts, and enabled trx types with full amount (per Bank policy) for draft, approve, cancel trx rights. The Admin Role also has the maximum Role Approval Limits per Company Policy and the ability to View all User Roles trx activity.		
Company Admin	Has access to all features, accounts, and enabled trx types with full amount (per Bank policy) for draft, approve, cancel trx rights. The Admin Role also has the maximum Role Approval Limits per Company Policy and the ability to View all User Roles trx activity.		
Company Admin	Has access to all features, accounts, and enabled trx types with full amount (per Bank policy) for draft, approve, cancel trx rights. The Admin Role also has the maximum Role Approval Limits per Company Policy and the ability to View all User Roles trx activity.		
Payables Admin	Has access to non-User or Company Policy related features, all accounts, and enabled payables GT trx types (ACH Single Payment, ACH Payments, ACH Payroll, Pass Thru, Domestic Wire Transfer, & Intl Wire Transfer) with full allowed amount (per Bank policy) for draft, approve, cancel trx rights. The Payables Admin Role also has the maximum Role Approval Limits per Company Policy and the ability to View all User Roles trx activity.		
Payables Admin	Has access to non-User or Company Policy related features, all accounts, and enabled payables GT trx types (ACH Single Payment, ACH Payments, ACH Payroll, Pass Thru, Domestic Wire Transfer, & Intl Wire Transfer) with full allowed amount (per Bank policy) for draft, approve, cancel trx rights. The Payables Admin Role also has the maximum Role Approval Limits per Company Policy and the ability to View all User Roles trx activity.		
Payables Admin	Has access to non-User or Company Policy related features, all accounts, and enabled payables GT trx types (ACH Single Payment, ACH Payments, ACH Payroll, Pass Thru, Domestic Wire Transfer, & Intl Wire Transfer) with full allowed amount (per Bank policy) for draft, approve, cancel trx rights. The Payables Admin Role also has the maximum Role Approval Limits per Company Policy and the ability to View all User Roles trx activity.		
Payables Clerk	Has no access to features, access to all accounts, and access to enabled payables GT trx types (ACH Single Payment, ACH Payments, ACH Payroll, Pass Thru, Domestic Wire Transfer, & Intl Wire Transfer) with 25% of the		

Click on the up arrow to minimize the User Role descriptions




User Roles

USER ROLE TEMPLATES

USER ROLES

Click on the pencil icon to manage the user role.


[Create Role](#)

Name ^	Description	Users ^			
admin role	None	2			

User Roles > admin role

Delete

Save

User Role Policy 
[Transactions](#) [Features](#) [Accounts](#)


Filter: **All** Enabled Disabled

ACH Batch

Can view all transactions
Can Draft/Approve/Cancel

\$1,000.00

ACH BATCH

Enabled 
[Rights](#) [Allowed Actions](#)

You can edit limits based on transaction, account (daily or monthly)

☒ View

All 

ACH Collection

Can view all transactions
Can Draft/Approve/Cancel

\$1,000.00

ACH Pass Thru

Can view all transactions
Can Draft/Approve/Cancel

\$1,000.00

Domestic Wire

Can view all transactions
Can Draft/Approve/Cancel

\$1,000.00

EFTPS

Can view all transactions
Can Draft/Approve/Cancel

\$1,000.00

Approval Limits

Per Transaction

Daily Per Account

Daily

Monthly

Maximum Amount

Maximum Count

\$ 1,000.00

\$ 1,000.00

999,999,999

\$ 1,000.00

999,999,999

\$ 10,000.00

999,999,999

User Roles > admin role

Delete

Save

User Role Policy 

Transactions [Features](#) [Accounts](#)

Filter: **All** Enabled Disabled


ACH Batch
Can view all transactions
Can Draft/Approve/Cancel
\$1,000.00

ACH Collection
Can view all transactions
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Can view all transactions
Can Draft/Approve/Cancel
\$1,000.00


EFTPS
Can view all transactions
Can Draft/Approve/Cancel
\$1,000.00

ACH BATCH Enabled 

[Rights](#) [Allowed Actions](#)

You can control the type of actions allowed for the user role

☒ View

All 

Approval Limits

	Maximum Amount	Maximum Count
Per Transaction	<div>\$1,000.00</div>	
Daily Per Account	<div>\$1,000.00</div>	<div>999,999,999</div>
Daily	<div>\$1,000.00</div>	<div>999,999,999</div>
Monthly	<div>\$10,000.00</div>	<div>999,999,999</div>

Add Allowed Action



Allows **ACH Batch** transaction for **any amount**

Operations

☒ Draft ☐ Draft Restricted ☒ Approve ☒ Cancel

Amount

☒ Any allowable amount
☐ Specific Amount

You can control the operations,
amount, subsidiaries, accounts, hours
and SEC Codes for the role created

Subsidiaries

☒ Any allowed subsidiaries (1) [Select specific subsidiaries](#)

Accounts

☒ Any allowed account (4) [Select specific account\(s\)](#)

Draft Hours

Any

[+ Add Draft Hours](#)

SEC Codes

Any

☐ PPD ☐ CCD ☐ WEB

User Roles > admin role

[Delete](#)[Save](#)[User Role Policy ?](#)[Transactions](#)[Features](#)[Accounts](#)

FEATURES ?

You can set Features in a similar way.

RIGHTS



Access to all payment templates



Allow one-time recipients



Centrix DTS Transaction Disputes



Commercial: Can view all recipients



Commercial: Recipient Upload From Batch



Enable ACH Reversal



Manage Recipients



Manage Users



Wire: Incoming Wire Alerts



Wire: Upload From Batch



Wire: Wire Activity Page

GENERATED TRANSACTION




Enable Multi-Transfer



Enable Multi-Wire

User Roles > admin role


User Role Policy 
[Transactions](#)
[Features](#)
[Accounts](#)

And set Access to Accounts in a similar way.

Delete

Save

ACCOUNTS

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>	Labels
9636	PERSONAL MONEY MARKET	✓	✓	✓	
4856	COMMERCIAL REAL ESTATE INV	✓	✓		
4444	PERSONAL SAVINGS	✓	✓	✓	
9792	Payroll Account	✓	✓	✓	
3255	PERSONAL BASIC CHECKING	✓	✓	✓	

Delete

Save



Visit us at Bankofhope.com Business Banking for additional information

<https://www.bankofhope.com/business-banking>

For assistance please call us at (800)788-4580 or email us at GTMSCustomerService@bankofhope.com