



Business Online Banking Plus

User Maintenance



Member
FDIC

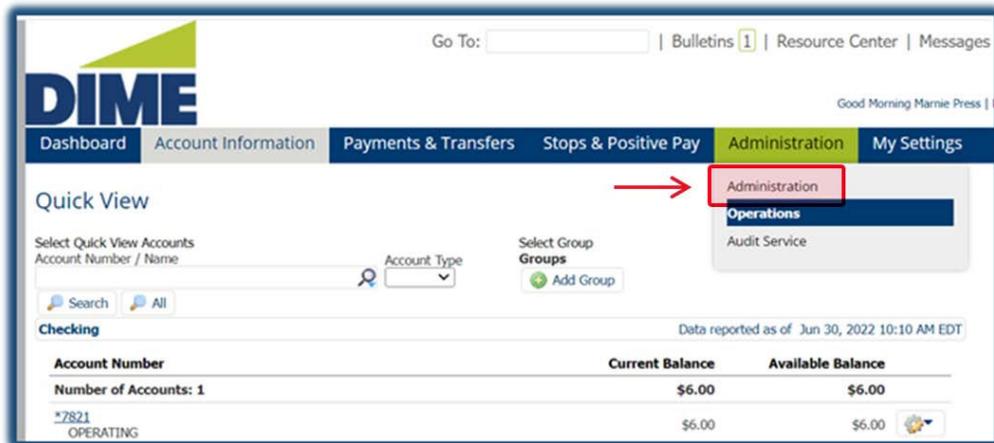
Dime Community Bank



User Maintenance in Business Online Banking PLUS

To access the current users enrolled for your Company please see below. To add a new user, please refer to page 8.

1. From the home page, select the Administration menu.
2. Select Administration. All existing users will be displayed.



ACTIONS MENU: Use to make changes to entitlements of current users enrolled for your Company.





Edit – certain user information can be updated for the user.

- **First Name**
- **Last Name**
- **Administrative User** allows the user to have all administrative abilities.
- **Enable Date** is the first date the user can login.
- Email Address is where the system sends the user emails such as Temporary Passwords, Account Alerts (see [Account Information](#) menu) and Subscriptions (see [My Settings](#) menu). *Changes to email addresses must be submitted to the bank.*
- **Encrypted Report Password** is the password used to open PDF reports that you choose to encrypt. They are generated through Information Reporting, Report Delivery, Alerts, etc.
- **Enable SMS Messages** MUST BE SELECTED to enable a user to receive SMS text messages.
- **Terms and Conditions** – The checkbox must be selected to agree to the Terms and Conditions as well as enable a user to receive SMS text messages.
- **Message Enabled Cell Phone Number** – the number that will receive their SMS texts.
- **Software Activation Key** is the code needed to activate the Secure Browser and/or the Mobile Banking App/Mobile Token App. Select [Reset](#) to get a new [Key](#) if it has expired.
- **Bulletin Delivery** allows the Bank to email Bulletins like service outage messages. Cell Phone Notification lets you receive bulletins via SMS. *Bulletin Channel must be set to EMAIL. Bulletin Format must be set to HTML.*
- **SMS Notification Window** allows the selection of dates and time that the user will receive SMS texts.

Password – a temporary password can be sent to a User via email or text.

- Find the user, then select the Actions button at the right.
- Select Password.
- Choose the Email or Text Message radio button. Select Submit. A user must be setup to receive SMS text messages.

Send Temporary Password

Please select to send the temporary password

Email

Submit Cancel



Services – the services that the user is allowed to access is presented in the Services section.

Add or View Services

- a. Find the user, select the **Actions** to the right of that user.
- b. Select **Services**.
- c. The services available to a user will display by category. **Corporate Customers, Small Business Customers, Statement and Notices, and System Administration** will present.
- d. To add a service, check the box next to the service needed.
- e. Select Save when all selections are added.



Delete Services

- a. Find the user, select the **Actions** to the right of that user.
- b. Select **Services**.
- c. The services available to a user will display by category. **Corporate Customers, Small Business Customers, Statement and Notices, and System Administration** will present.
- d. To delete a service, uncheck the box next to the service to be removed.
- e. Select Save.



Edit Services

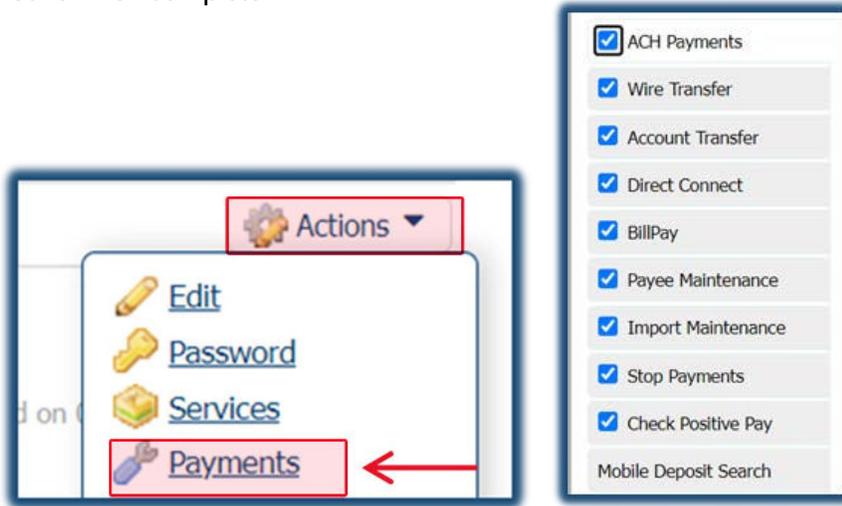
- Find the user, select the Triangle to the left of a user's name.
- All services assigned to the user are displayed.
- Click on the **Yellow Pencil** to edit the Service for the user.
- Click on the **Green Briefcase** to edit the accounts available to the user for each Service.

The screenshot displays the 'Users' management page. At the top, there are two user entries: 'Marnie Press (DIMETEST) Administrator' and 'New User (NewUser)'. The 'New User (NewUser)' entry is expanded, showing a 'User Details' section with fields for 'E-mail Address: newuser@dime.com', 'Enable Date: 06/24/2022', 'Phone Number: (631)537-1000', and 'Last Login: Never'. Below this is a 'Services' section categorized into 'Corporate Customers', 'Small Business Customers', 'Statements and Notices', 'System Administration', and 'Default'. Each service entry includes a red 'X' icon, a yellow pencil icon, and a green briefcase icon. A red box highlights the 'User Details' dropdown, and a red arrow points to it from the right.



Payments – the Payments selection in the Actions menu is used to add/delete/edit ability of a user to make transfers, deposits, and other payments.

1. Select the **Actions** button to the right of the user.
2. Select **Payments**. The Payment or transaction services available to your company will display.
3. The Payments enabled for the user will have a Blue Check box next to the title.
4. Select the checkbox for Payment or transaction type to assign to the user.
5. Additional settings will present to enable for the service selected.
6. Click Save when complete.



- **ACH Payments**
- **Wire Transfer**
- **Account Transfer**
- **Direct Connect** – for QuickBooks Desktop
- **BillPay** – Sends Electronic or Check Payments
- **Payee Maintenance** – Wires & ACH
- **Import Maintenance** – Wires, ACH, & Transfers
- **Stop Payments** – Stops for Checks
- **Check Positive Pay**
- **Mobile Deposit Search** – Includes **Remote Deposit Capture** and **Mobile Deposit** settings



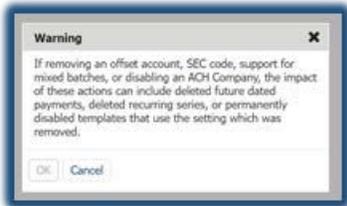
Direct Connect – allow the ability to use Direct Connect in QuickBooks.
Note: if the option is not available in the Actions Menu please contact the bank.



- 1. From the Actions Menu, select **Payments**.
- 2. Select **Direct Connect**.
- 3. Select **“User is entitled to Direct Connect service”**.
- 4. Click **Save**.



- 5. A Warning Screen will appear. Select **OK**.



- 6. Select the Actions.
- 7. Select **Direct Connect**.



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- Under User Credentials, the Direct Connect Suggested User ID will appear to be validated. Click **Validate**. This User ID is to be used with your current password to connect QuickBooks to Dime’s Business Online Banking.

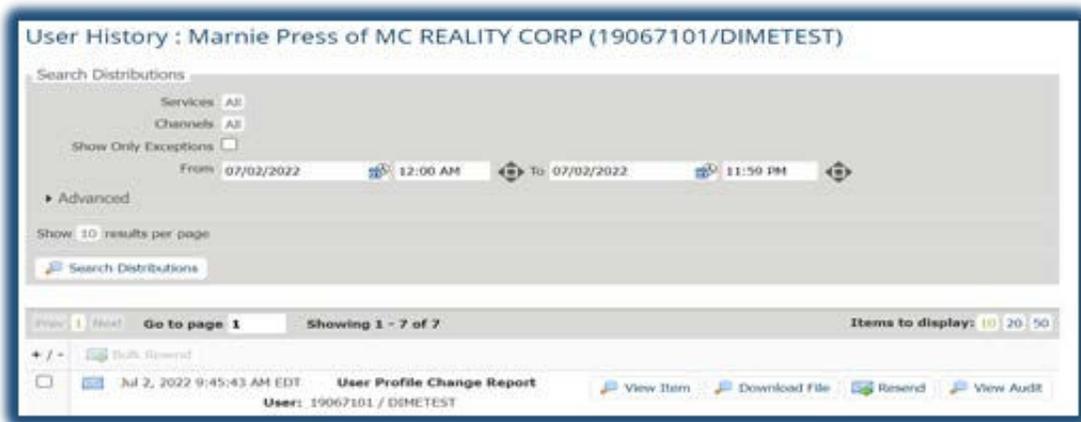


- The following Message will appear on the screen to confirm the Direct Connect Suggested User ID is now valid and available for use.



Resend – allows the admin to search for notifications sent to the user.

- Select **Administration**.
- Select **Actions**.
- Select **Resend**.
- Provide a date range to search all notifications sent to that user.
- Select **View** Item to view the item sent to the user.
- Select **Resend** to send the item to the user again.
- Select **View Audit** to view additional information.





Create a New User – An existing user may be cloned to create another user or a new user can be added.

Clone User *saves time by creating a new user based on the setup of an existing user.*

1. Find the user to be cloned in creating the new user. It is recommended to view the services that the user you are cloning is set up with prior to selecting Clone. Select **Actions** then **Services** and review their services first. Select **Return**. Select **Administration**.
2. To the right of the user that will be cloned, select **Actions**.
3. Select **Clone User**.
 - a. Create a User ID.
 - b. The Clone User will copy all of the user information from the user selected to clone. Update all fields with the information for the new user.
 - c. Enter a **temporary password** to provide to the new user with the created user ID and Company number. Upon completion of the user setup, securely provide your employee with the **Company ID**, their **User ID**, and their **Temporary Password**.
 - d. At the bottom of the page, see the **Cloning Preferences**.
 - e. Select the **Copy Service Permissions** radio button if you wish to copy the services from the existing user. Or select **Do Not Copy (Service) Permissions**.
 - f. Select **Copy Secure Browser permissions** if you wish to copy them.
 - g. Select **Save**.
 - h. Clone DOES NOT copy Payment and transaction features, but you can add them individually once you have created a user.



Add User

1. Select **Administration**
2. Select **Actions** to the right of the Company Name/Number
3. Select **Add User**



4. Enter all required information.
5. The user will now need their Services and Payments options set up. Follow the instructions from the top of this guide.

Copy Service – lets you copy services from an existing user to the user you selected.

1. Select **Copy Services**.
2. Enter the **User ID** to copy the services from.
3. Put a check next to **Copy account permissions** and **Copy Secure Browser permissions**.
4. Click **Save**.
5. Review the **Services** and **Payments** that were assigned





Delete or Deactivate a User – Users can be deleted or deactivated. Deleted users will be removed from the system and no longer appear in the User list. Deactivated Users will be prevented from logging in to the online banking portal.

1. Select the **Administration** tab
2. Select the **Actions** tab
3. Select **Delete User** or **Deactivate User**.
4. Click **Yes** to confirm the action

Subscriptions – are notifications that can be sent via email or SMS text. These notifications include transfer statuses, user profile changes and other changes.

1. Select the **Administration** tab
2. Select the **Actions** tab
3. Select **Subscriptions**.
4. Select the **Arrow** next to the title to review if the notification will be sent and the Delivery Setting enabled. The Format Preference should always be set to HTML. To add a notification, check next to the description. To discontinue the notification, please uncheck the box next to the description.
5. Click **Save** when complete.

