WEST SHORE BANK

WSBTouch

BUSINESS USER MANAGEMENT GUIDE

Who can add users

You must have at least the **Admin** role and the **Create everything** permission to create a user.

Add & Invite a Business User

1. Select My profile → Business management.

2. Select Create user.

3. Enter the user's First name, Last name, and Email.

4. Select the User role: User, Viewer, or Admin.

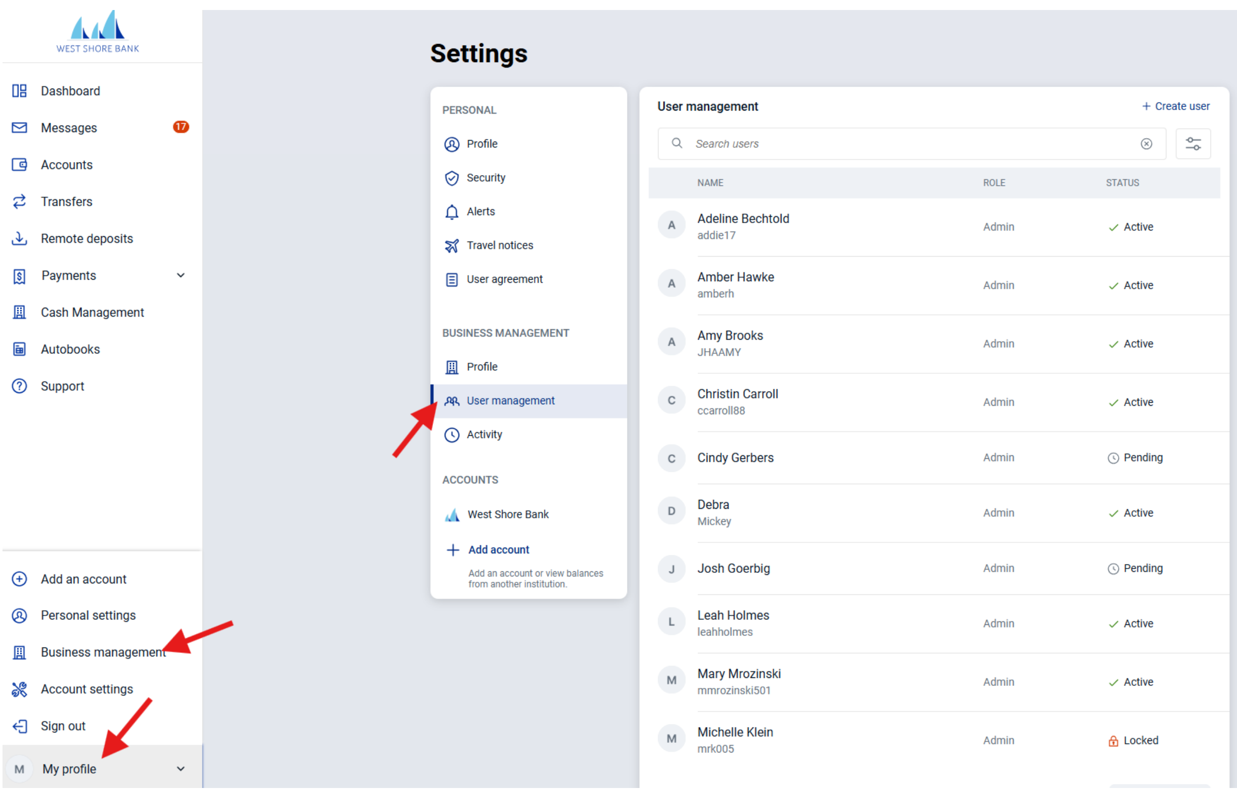
5. Select Create user (you may be asked to confirm your credentials).

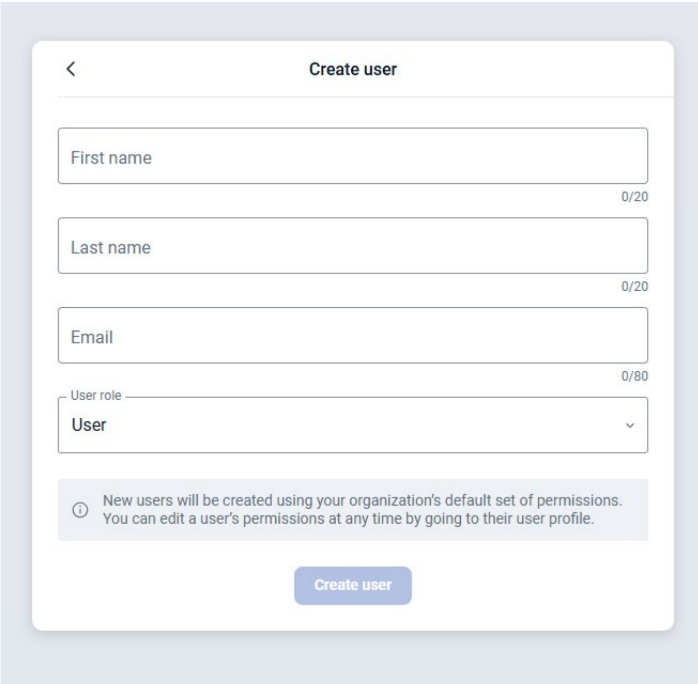
6. If prompted, enter your code and select Confirm.

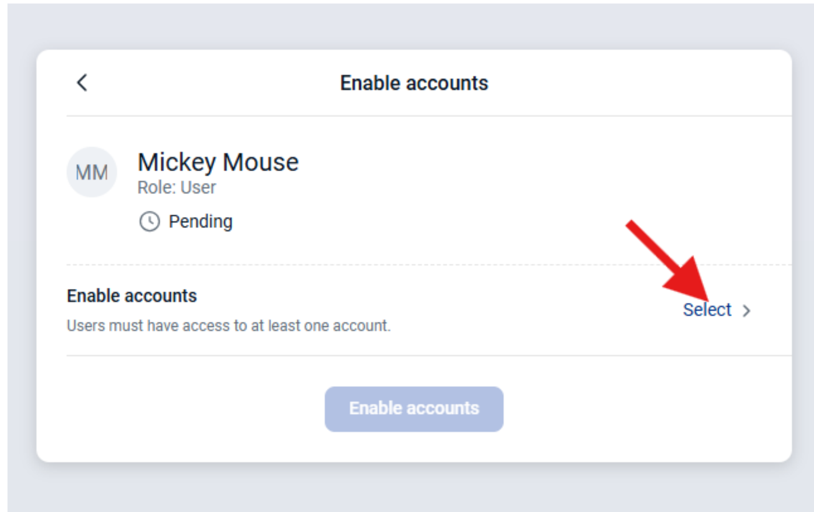
7. Select Enable accounts. Users must have access to at least one account.

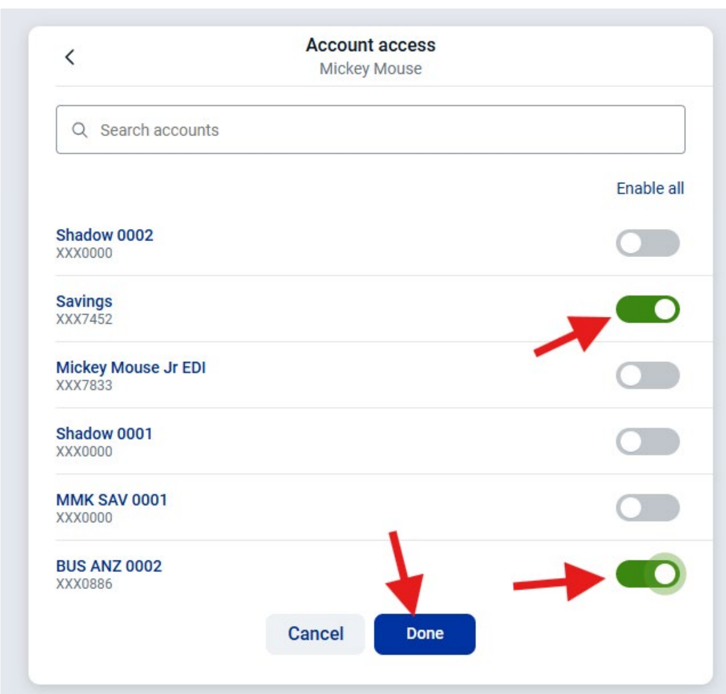
8. In Account access, use the sliders to turn account access on or off for each account, then select Done.

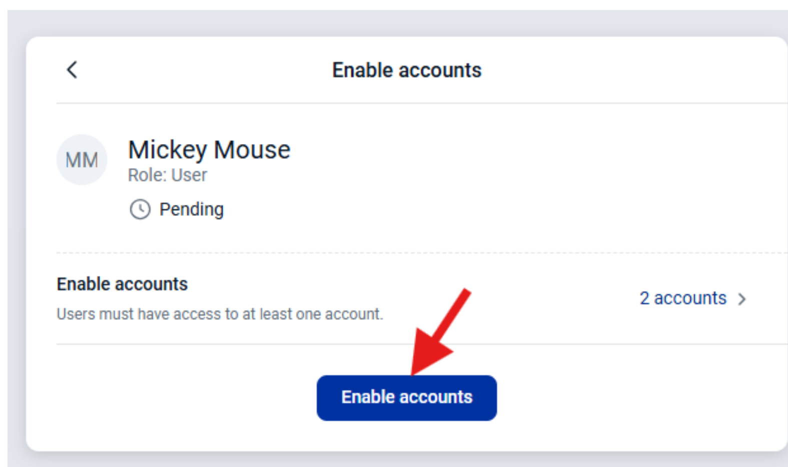
9. Select the Enable accounts button to finalize.




Create user
First name
0/20
Last name
0/20
Email
0/80
User role
User
New users will be created using your organization's default set of permissions.
You can edit a user's permissions at any time by going to their user profile.
Create user


Enable accounts
MM
Mickey Mouse
Role: User
Pending
Enable accounts
Users must have access to at least one account.
Select
Enable accounts


Account access
Mickey Mouse
Search accounts
Enable all
Shadow 0002
XXX0000
Savings
XXX7452
Mickey Mouse Jr EDI
XXX7833
Shadow 0001
XXX0000
MMK SAV 0001
XXX0000
BUS ANZ 0002
XXX0886
Cancel
Done


Enable accounts
MM
Mickey Mouse
Role: User
Pending
Enable accounts
Users must have access to at least one account.
2 accounts
Enable accounts

Roles quick reference

When creating a user, choose one of these roles:

• User: Standard access.

• Viewer: Read-only access (no transactional authority).

• Admin: Administrative access including user and settings management (scope depends on permissions).

After the user is created

Choose one of the following:

Send email invite

Select Send email invite to email the user a link to create their username and password.

You'll be redirected to the Manage users screen.

Change user permissions

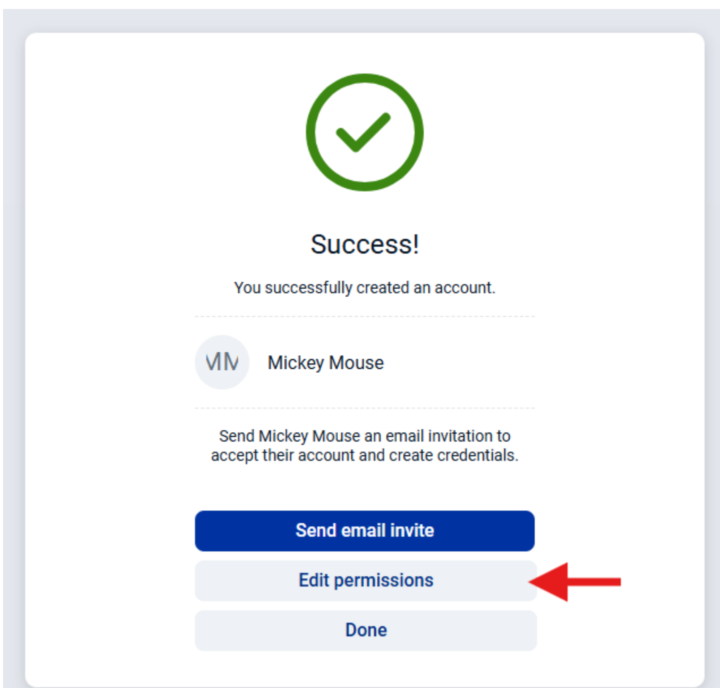
Select Edit permissions to open the user's profile.

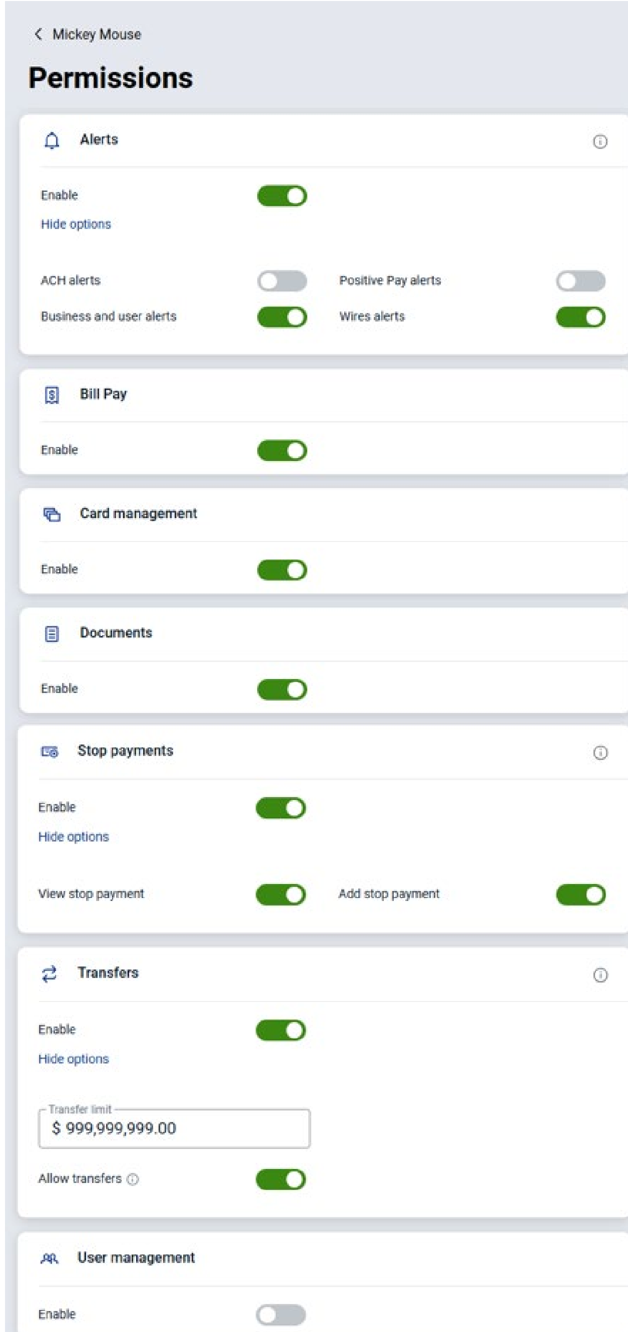
Select Set permissions and use the toggles to adjust access as needed.

Select Done

The user is created and you return to Manage users.

Note: If you select Done, no invite email is sent. You can send it later from the user's profile.

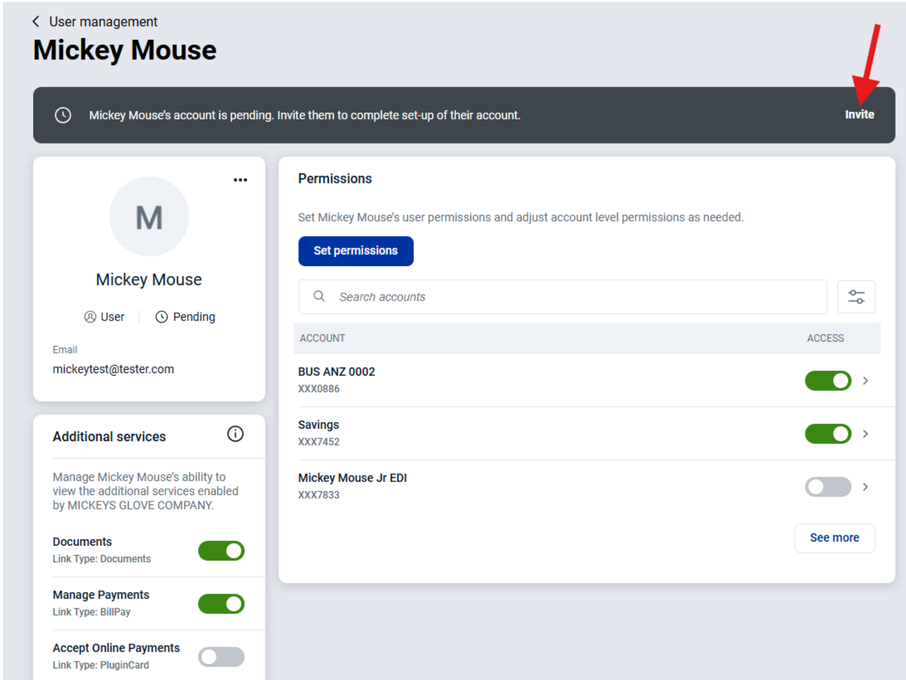




Set permissions

Typical permission categories you may see include: Alerts, Bill Pay, Card management, Documents, Stop payments, Transfers (with transfer limits), and User management.

Toggle the permissions on that this user needs to perform their job. You can change the internal transfer limit should this user need a specific amount.



Edit a Business User

1. Select My profile → User management.
2. Select the user you want to edit.
3. Next to the profile image, select the Ellipsis (⋯).
4. Select Edit user to open the Edit user window.

Edit the username

Select Edit name, make your changes, then select Save.

You will see a confirmation that the name was updated successfully.

Edit the user role

Choose a role from the User role dropdown. A confirmation appears when updated successfully.

Edit the user's email

Select Edit email, change the address, then select Save. A confirmation appears when updated successfully.

Unlock a locked account

After three or more incorrect login attempts, the user account is locked.

An administrator must unlock the account

It can take up to five minutes for an account to appear as Locked in User management.

1. Select My profile → Business management.
2. Open the user's profile (you'll see a banner stating their access is locked).
3. Select Unlock. A success message confirms the unlock.
4. If needed, select Send password reset → Email, then notify the user to reset their password before signing in.
5. Select I'm done.