



WEST SHORE BANK

# WSBTouch

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## BUSINESS USER MANAGEMENT GUIDE

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## 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.

The screenshot displays the West Shore Bank interface. On the left is a navigation menu with options: Dashboard, Messages (17), Accounts, Transfers, Remote deposits, Payments, Cash Management, Autobooks, and Support. Below these are 'Add an account', 'Personal settings', 'Business management', 'Account settings', 'Sign out', and 'My profile'. The main area is titled 'Settings' and contains three sections: 'PERSONAL' (Profile, Security, Alerts, Travel notices, User agreement), 'BUSINESS MANAGEMENT' (Profile, User management, Activity), and 'ACCOUNTS' (West Shore Bank, Add account). A red arrow points to 'User management' in the Business Management section. Another red arrow points to 'Business management' in the left sidebar. A third red arrow points to 'My profile' at the bottom of the sidebar. The 'User management' panel on the right includes a '+ Create user' link, a search bar, and a table of users.

|   | NAME                            | ROLE  | STATUS    |
|---|---------------------------------|-------|-----------|
| A | Adeline Bechtold<br>addie17     | Admin | ✓ Active  |
| A | Amber Hawke<br>amberh           | Admin | ✓ Active  |
| A | Amy Brooks<br>JHAAMY            | Admin | ✓ Active  |
| C | Christin Carroll<br>ccarroll88  | Admin | ✓ Active  |
| C | Cindy Gerbers                   | Admin | ○ Pending |
| D | Debra Mickey                    | Admin | ✓ Active  |
| J | Josh Goerbig                    | Admin | ○ Pending |
| L | Leah Holmes<br>leahholmes       | Admin | ✓ Active  |
| M | Mary Mrozinski<br>mmrozinski501 | Admin | ✓ Active  |
| M | Michelle Klein<br>mrk005        | Admin | 🔒 Locked  |

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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

Q Search accounts

Shadow 0002

XXX0000

Enable all

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

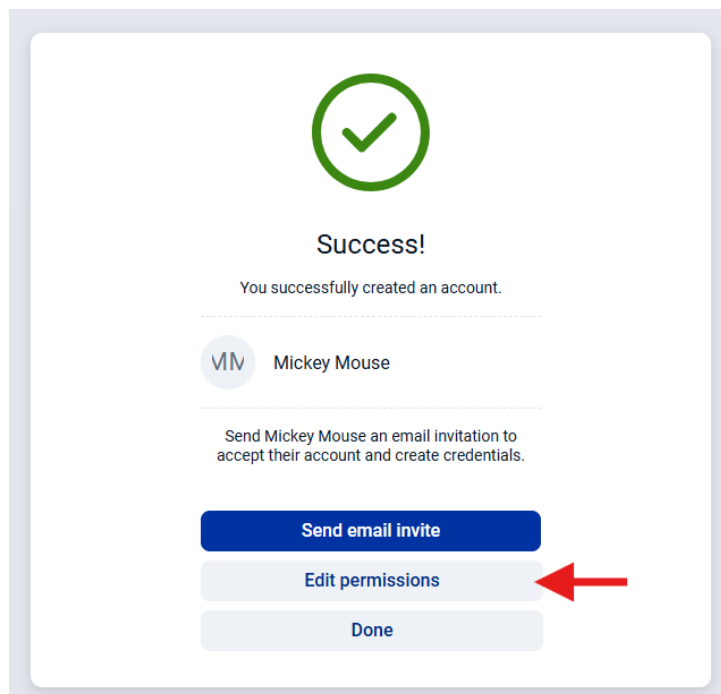
Select Send email invite to email the user a link to create their username and password.  
You'll be redirected to the Manage users screen.

### 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.



Alerts

Enable

Hide options

ACH alerts

Positive Pay alerts

Business and user alerts

Wires alerts

Bill Pay

Enable

Card management

Enable

Documents

Enable

Stop payments

Enable

Hide options

View stop payment

Add stop payment

Transfers

Enable

Hide options

Transfer limit

\$ 999,999,999.00

Allow transfers

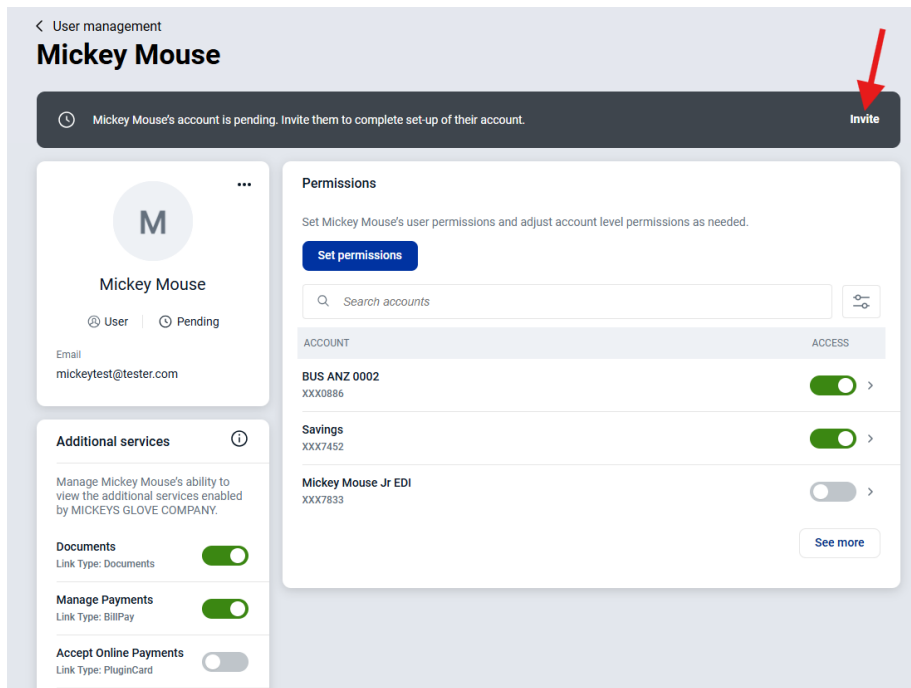
User management

Enable

## 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.