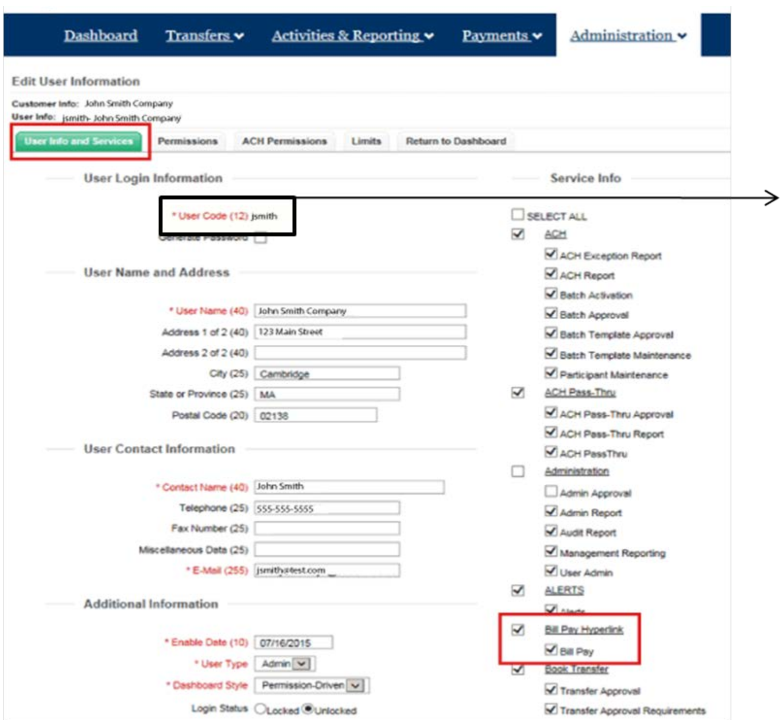
Adding and Editing Bill Pay Users

Only Company Administrators will have the ability to add and edit Bill Pay Users in Business Online Banking. Cambridge Savings Bank will first establish the Company Administrator's Bill Pay profile, and then the Administrator will be responsible for adding additional Bill Pay Users. Instructions for how to add and edit Bill Pay Users in Business Online Banking are outlined below.

Step 1:

The Company Administrator must first permission the User to access Bill Pay within Business Online Banking. From the **Dashboard** homepage, click the ***Administration*** tab and select ***User Admin*** from the dropdown menu. Locate the User that you want to grant permission to and click the ***Edit*** icon for that User.

From the ***User Info & Services*** tab on the ***Edit User Information*** screen, select the ***Bill Pay*** service options under ***Service Info*** and click ***Submit*** to permission the User.

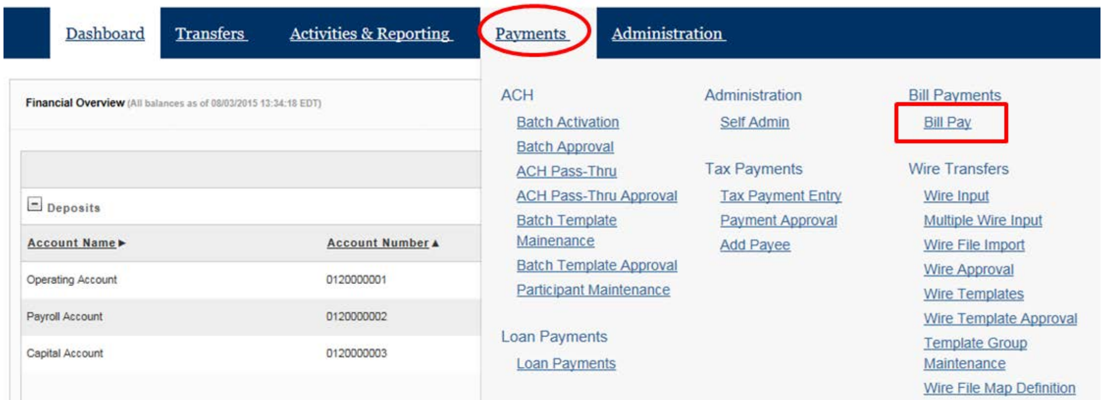


Important Note:

Both the Company ID and User ID are needed when establishing the Bill Pay User on the Bill Pay System. The IDs are case sensitive and must match exactly what is established in the Business Online Banking system. The Company Administrator can capture the User's ID from the Edit User Information Screen.

Step 2:

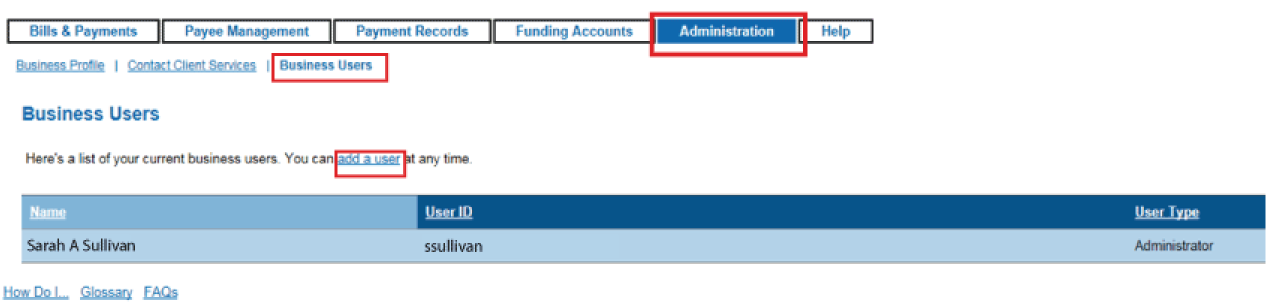
Once the Bill Pay service is added to the User's permissions, go to the ***Payments*** tab and select ***Bill Pay*** from the dropdown menu.



From the **SB Bill Pay** screen, click the ***Login to SB BillPay*** button to get to the Bill Pay homepage.

Step 3:

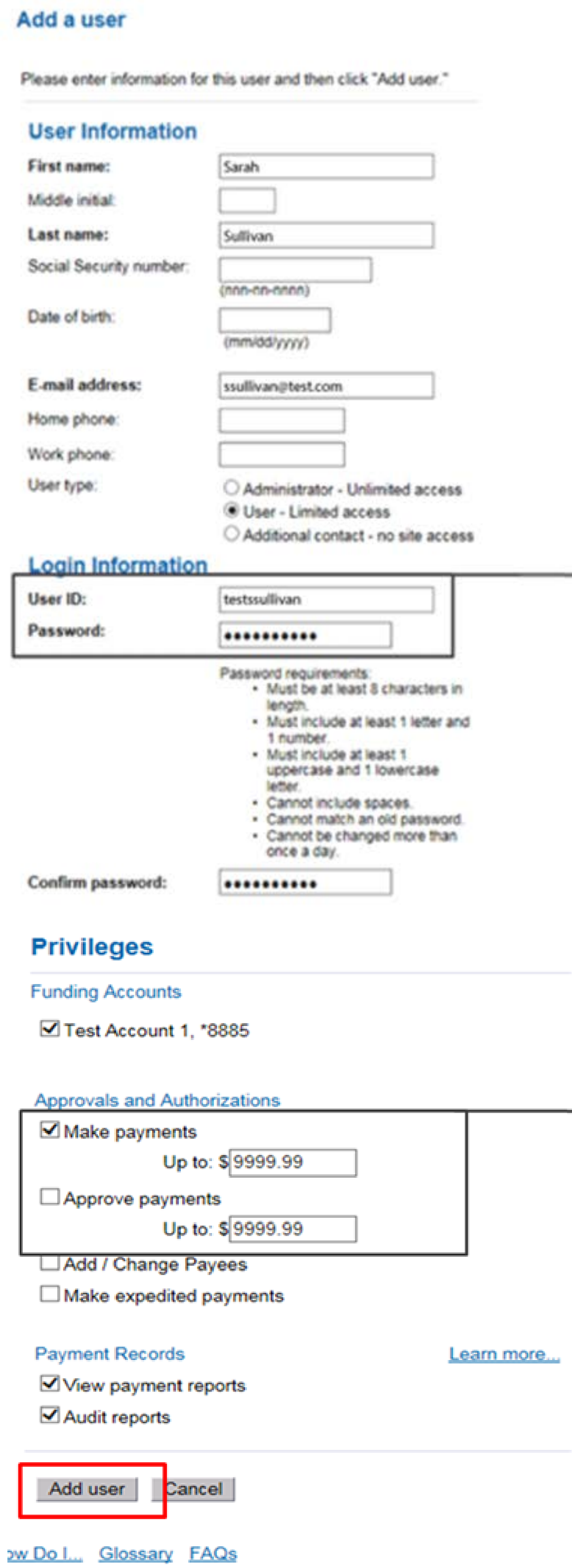
From the Bill Pay homepage, click on ***Administration*** and then select the ***Business Users*** option. From the **Business Users** page, click ***add a user*** to add a new Bill Pay User.



csb Cambridge SAVINGS BANK

Step 4:

On the ***Add a User*** page, complete the ***User Information***, ***Login Information***, and ***Privileges*** (including account numbers, approval limits, authorizations, and reports) sections. Once all fields are complete, click the ***Add user*** button at the bottom of the page to continue.



Add a user

Please enter information for this user and then click "Add user."

User Information

First name: Sarah

Middle initial:

Last name: Sullivan

Social Security number: (nnn-nn-nnnn)

Date of birth: (mm/dd/yyyy)

E-mail address: ssullivan@test.com

Home phone:

Work phone:

User type:
- Administrator - Unlimited access
- User - Limited access
- Additional contact - no site access

Login Information

User ID: testssullivan

Password: ••••••••••

Password requirements:
- Must be at least 8 characters in length.
- Must include at least 1 letter and 1 number.
- Must include at least 1 uppercase and 1 lowercase letter.
- Cannot include spaces.
- Cannot match an old password.
- Cannot be changed more than once a day.

Confirm password: ••••••••••

Privileges

Funding Accounts

☑ Test Account 1, *8885

Approvals and Authorizations

☑ Make payments
Up to: $ 9999.99

☐ Approve payments
Up to: $ 9999.99

☐ Add / Change Payees

☐ Make expedited payments

Payment Records — Learn more...

☑ View payment reports

☑ Audit reports

Add user | Cancel

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User ID:

The Bill Pay User ID must match the combination of the Business Online Banking Company ID and User ID

Example:
Company ID= test
User ID= ssullivan
Bill Pay User ID = testssullivan

Password:

A password is required to set up the Bill Pay User. However, since Users will access the site through Business Online Banking, this password will not be utilized. There is no need to record or share it with the end User.

Make Payments:

"Make Payments" can be set to any amount up to $9,999.99.

Approve Payments:

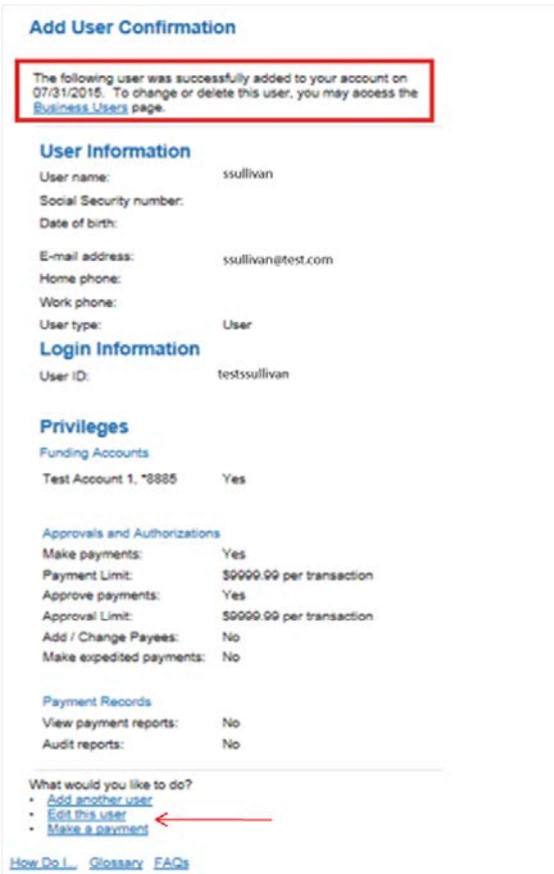
If "Approve Payments" and "Make Payments" are selected, then dual control is not required for this User when they're making or approving payments.

If a User has only "Make Payments" authorization, another User will need to approve the payments for processing.

Step 5:

Once the Company Administrator clicks **Add user**, an ***Add User Confirmation*** message will appear at the top of the screen confirming that the User was successfully added.

Please review the User's Bill Pay confirmation details and ensure all the information is accurate. If edits need to be made, the Company Administrator can click ***Edit this user*** at the bottom of the page.


Add User Confirmation

The following user was successfully added to your account on 07/31/2015. To change or delete this user, you may access the Business Users page.

User Information

User name:	ssullivan
Social Security number:	
Date of birth:	
E-mail address:	ssullivan@test.com
Home phone:	
Work phone:	
User type:	User

Login Information

User ID:	testssullivan

Privileges

Funding Accounts

Test Account 1, *8885	Yes

Approvals and Authorizations

Make payments:	Yes
Payment Limit:	$9999.99 per transaction
Approve payments:	Yes
Approval Limit:	$9999.99 per transaction
Add / Change Payees:	No
Make expedited payments:	No

Payment Records

View payment reports:	No
Audit reports:	No

What would you like to do?

- Add another user
- Edit this user
- Make a payment

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