

# BUSINESS ONLINE BANKING

INSTRUCTIONAL GUIDE

BAKER



BOYER

Member FDIC

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# LOGGING ON FOR THE FIRST TIME

Clients accessing a new Online Banking profile will need to complete their first-time log in.

1

Click the “Join” button in the “Organization User Invitation” email received from [info@notifications.bakerboyer.com](mailto:info@notifications.bakerboyer.com).

Note: If the link has expired, due to seven calendar days passing or a subsequent email invalidating the selected link, you will receive the following message: “Invitation link failed. Contact an admin at your organization to request another invite.”

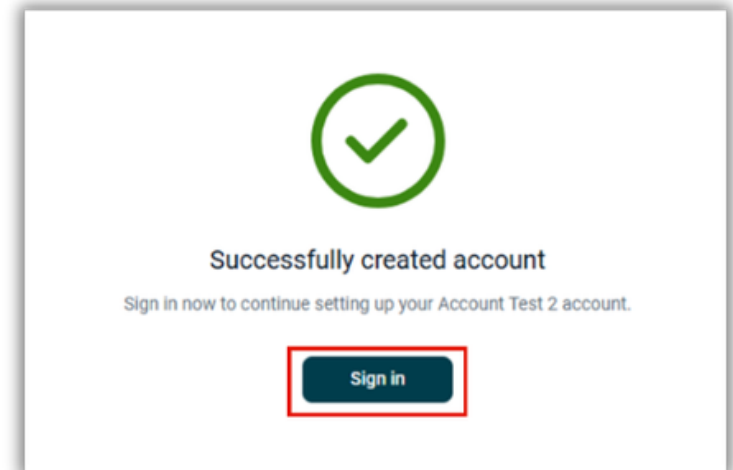
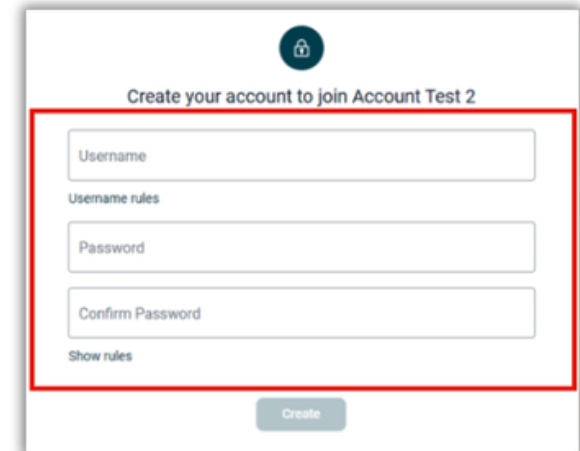
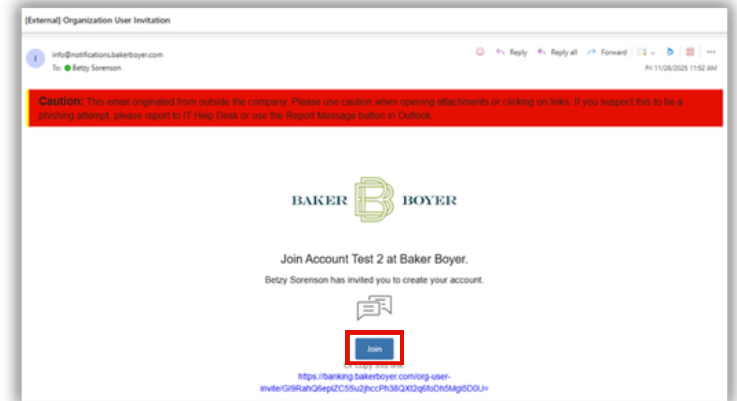
2

Create your Username, enter a password, confirm password, then click “Create”.

Note: Please view Username or Password rules if any errors prompt.

3

Click “Sign in” to enter your new login credentials.

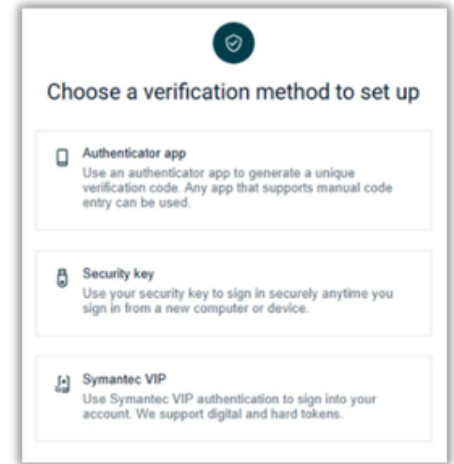
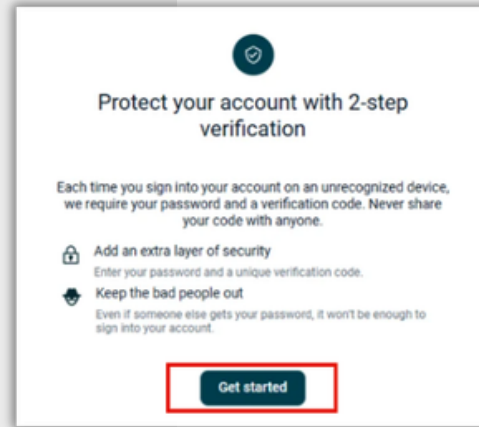


# LOGGING ON FOR THE FIRST TIME

CONTINUED

4

Click “Get Started” to select your preferred two-factor authentication method



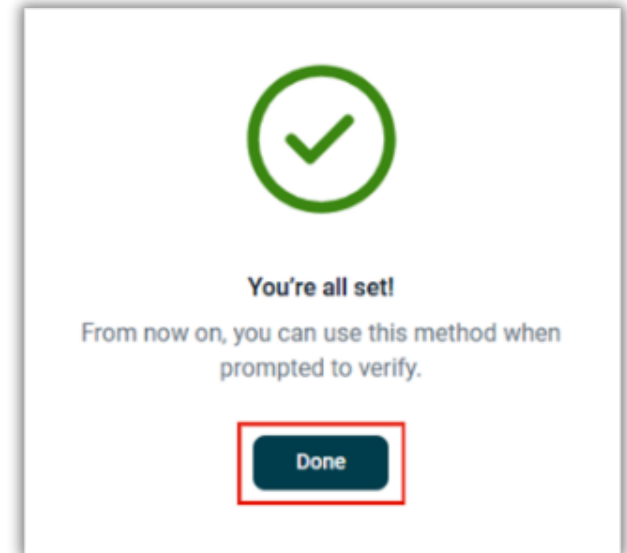
5

Choose between an Authenticator App, Security Key, or Symantec VIP.

Note: Cash Management clients with specific permissions may be required to enroll in the “Security Key” option only.

6

Once two-factor authentication is set up, you will receive the screen to the right. Click “Done”.



# LOGGING ON FOR THE FIRST TIME

CONTINUED

7

Review the terms within the User Agreement using the Scroll bar. Then, check the box acknowledging that you agree to the terms of service and click the blue “Accept” button to access Online Banking.

**BAKER BOYER**

## User agreement

This Digital Banking Service Agreement (as amended from time to time, this “Agreement”) governs your access and use of the Digital Banking Service provided by Baker Boyer National Bank online and through its mobile applications. This Agreement also includes certain licensing rights and restrictions, including an end user agreement between you and our primary software licensor. Whenever you access or use the Digital Banking Service, or authorize others to use it, you agree to these terms. Baker Boyer National Bank may amend these terms from time to time. You will be notified of any amendments that affect your rights or obligations within the appropriate time period as determined by Baker Boyer National Bank. Each of your accounts at Baker Boyer National Bank, which are accessed by the Digital Banking Service, continue to be governed by the applicable Account Disclosure and Regulations relating to deposit accounts and other services and Electronic Fund Transfer Agreement and Disclosure, otherwise known as Disclosures and Regulations, the applicable Statement of Fees, and any other applicable agreements, as they may be amended from time to time.

SECTION 18(F) OF THIS AGREEMENT INCLUDES DISPUTE RESOLUTION PROVISIONS, INCLUDING A WAIVER OF RIGHTS TO TRIAL BY JURY.

Customer Support

I have read and agree to the terms of service.

**Accept**

# ADDING A USER

User Maintenance is only available to users with “Admin” user roles.

1

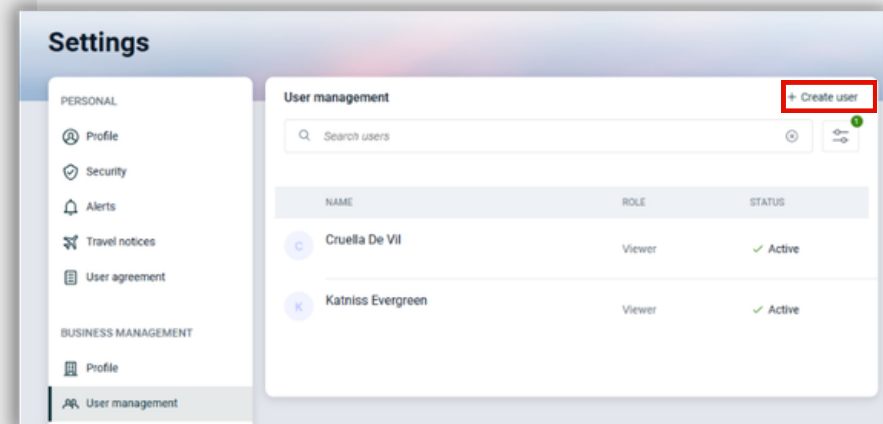
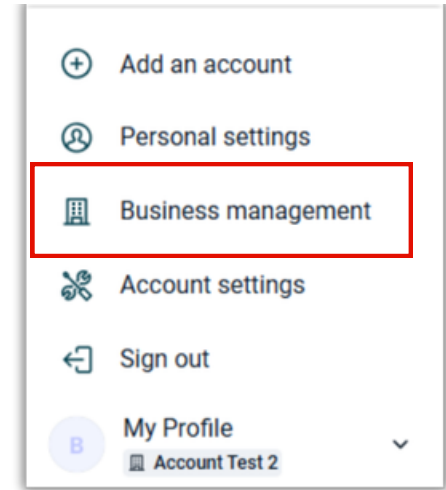
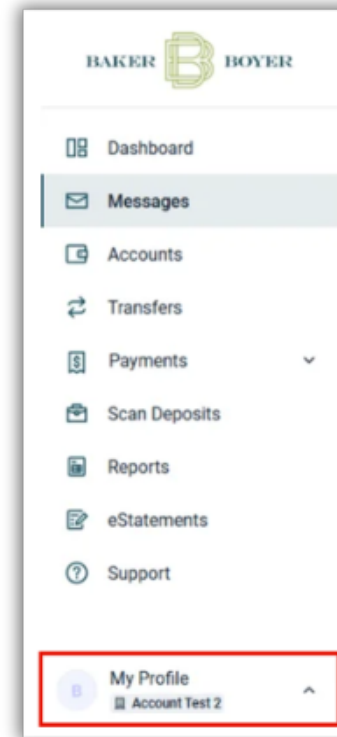
Click “My Profile” button. This may appear as your name.

2

Click the “Business management” button.

3

Click the “+ Create User” button.



# ADDING A USER

4

Enter new user's name, email and role.  
Then click the "Create user" button. →

Note: after creating a new user, you will be prompted to verify your two factor authentication (2FA) method. For security Purposes, an email will also be generated to the Admin's email alerting them to the new user creation.

**User** = The User role is for organization members whose jobs involve performing day-to-day banking activities that don't require user management rights. They can move money based on their entitlements and permissions, but they don't have access to use or view the User management screen.

**Viewer** = The Viewer role gives an organization user access to view information in User management. They have the same access as an organization admin, but they can't edit entitlements or set permissions. This role is ideal for auditors your institution works with. User management must be enabled for each organization viewer.

**Admin** = The Admin role gives an organization user access to view or modify entitlements, set permissions for all organization users, and manage organization users (create, delete, etc.). They can also edit an organization user's profile details. Organization admins cannot change their own roles; however, they can update a fellow admin's role.

< Create user

First name  
Katniss 7/20

Last name  
Evergreen 9/20

Email  
katniss@email.com 17/80

User role  
User

*i* 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

# ADDING A USER

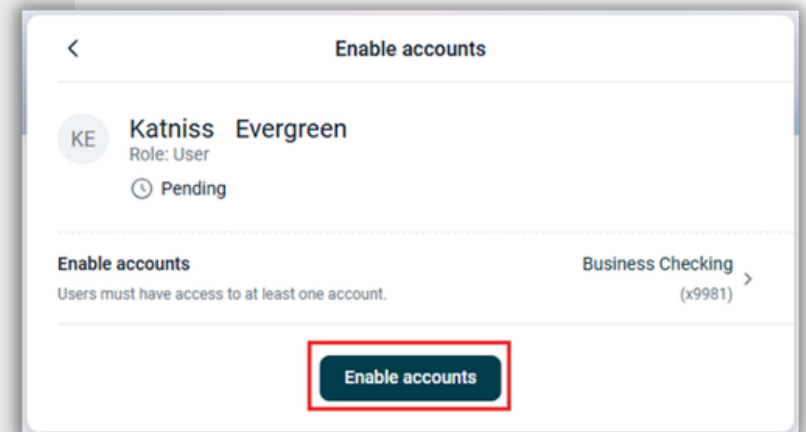
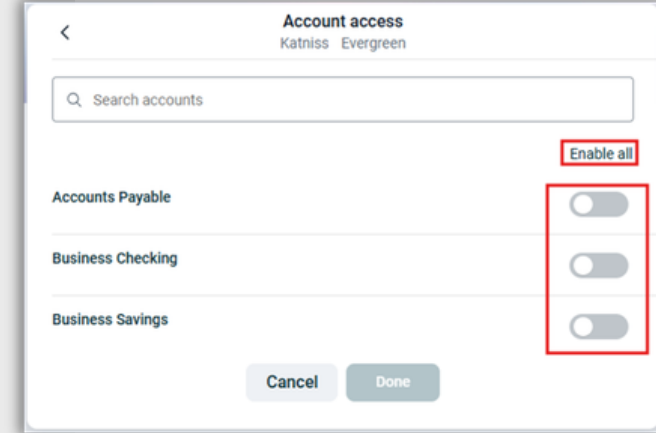
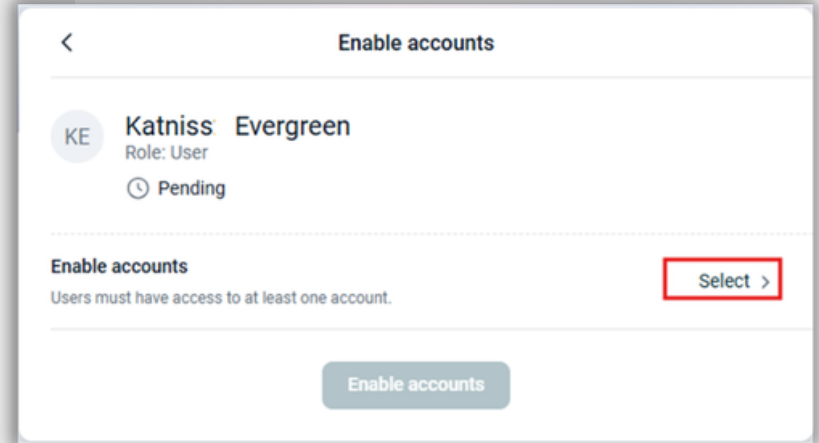
5

After verifying your 2FA method, the new user will be in “Pending” status. The Admin must select at least one account for the user to access to continue.

Note: The Admin can select all accounts at once, or toggle on individual accounts.

6

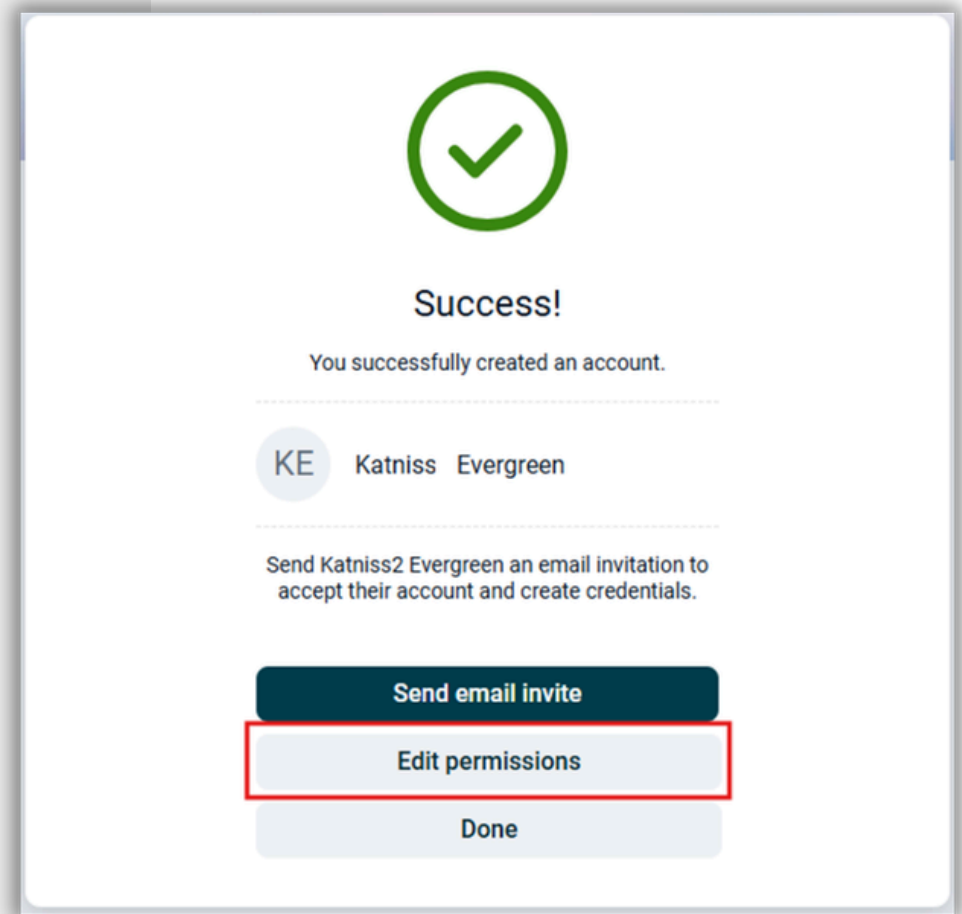
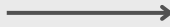
Click the blue “Enable accounts” button



# ADDING A USER

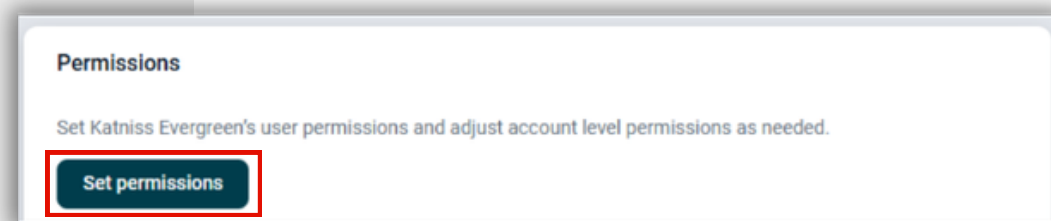
7

Once the account(s) are enabled, it is recommended for the Admin User continue to set up permissions for the new user. On the Success screen, click “Edit permissions” button.



8

Click the “Set permissions” button.



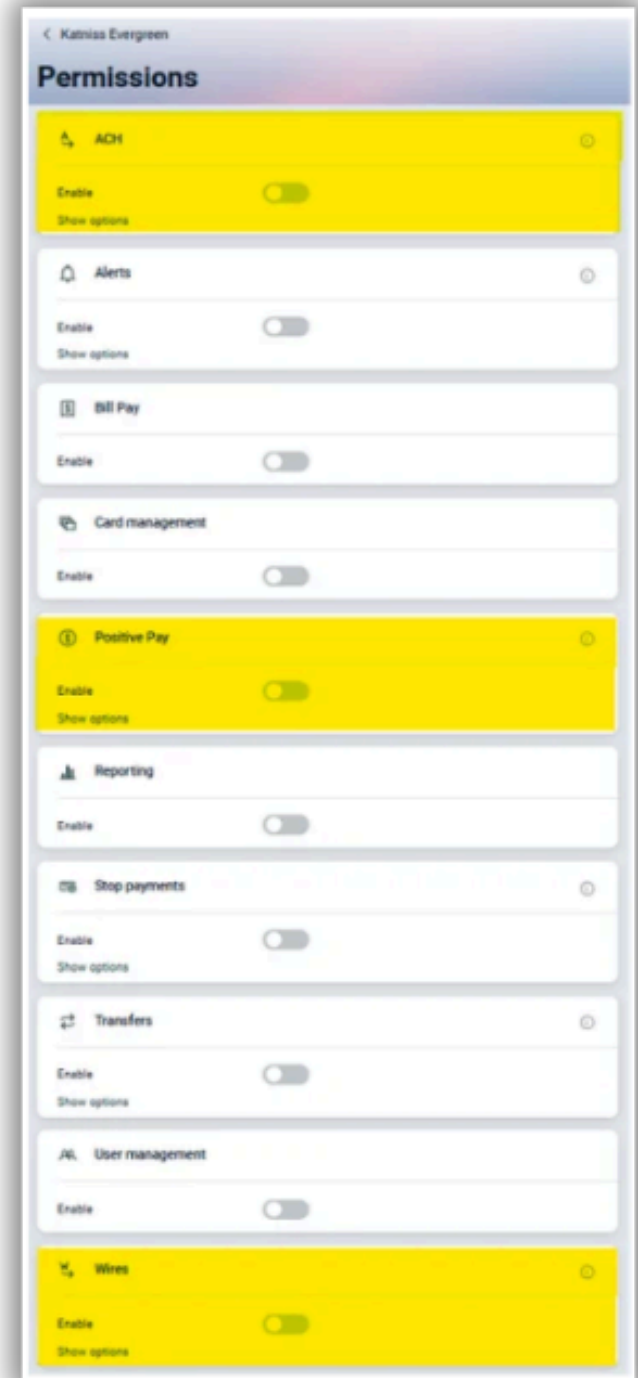
# ADDING A USER

## CONTINUED

9

The Permissions screen appears. →

Note: Areas in yellow are NOT to be edited. Those are for premium Cash Management users only. For more information on how to gain premium user access, email [CMSupport@bakerboyer.com](mailto:CMSupport@bakerboyer.com).



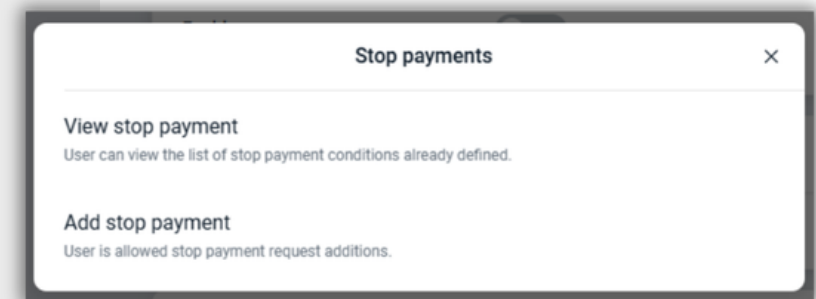
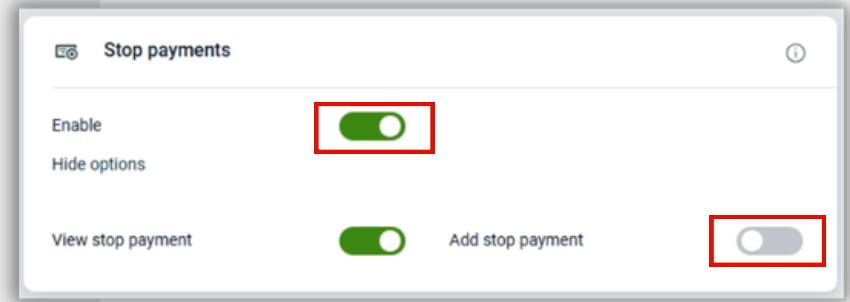
# ADDING A USER

## CONTINUED

10

Click on each option you wish to toggle on or off for the product.

Note: Clicking on the ⓘ icon found in the upper right-hand corner provides details on what each permission does.

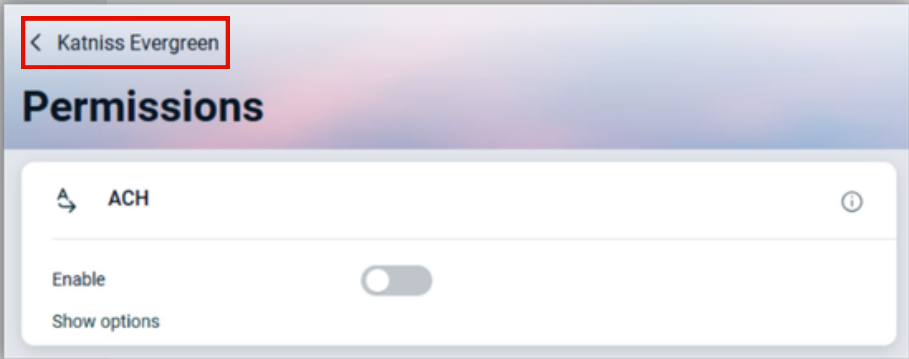


# ADDING A USER

## CONTINUED

11

To return to the user profile, click the “User name” back button.

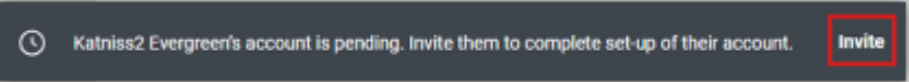


< Katniss Evergreen

The screenshot shows a mobile application interface for user permissions. At the top, there is a back arrow and the name 'Katniss Evergreen' in a red box. Below this is the title 'Permissions'. A card below shows a permission for 'ACH' with an 'Enable' toggle switch that is currently turned off. There is also a 'Show options' link.

12

After all permissions have been adjusted, user’s account will be pending. To send invitation, so they may activate the user, click on the “Invite” button.



Katniss2 Evergreen's account is pending. Invite them to complete set-up of their account. **Invite**

The screenshot shows a dark notification bar with a clock icon on the left. The text reads 'Katniss2 Evergreen's account is pending. Invite them to complete set-up of their account.' On the right side of the bar is a red 'Invite' button.

13

Once the “Invite” button is clicked, a message will appear in the lower left-hand corner stating the “Invitation sent successfully.”



Invitation sent successfully.

The screenshot shows a dark message box with the text 'Invitation sent successfully.' in white.

# TROUBLESHOOTING

- Some services like Bill Pay and eStatements require cookies to be enabled. Instructions on how to adjust your settings can be found on our website at: [Verifying Cookies - Step By Step Guide.](#)
- If you need additional assistance, please contact Baker Boyer at: [info@bakerboyer.com](mailto:info@bakerboyer.com)
- Additional resources and tools available for the app can be found on our website at: [Baker Boyer Mobile App](#)



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