

# Online Banking – Setup New Company User



1. You will go to our web site at <https://www.franklinsynergybank.com> and login to Online Banking.
2. Hover over “**Administration**”. Click on “**Company admin**”.
3. Click on “**Create a new user**” in the Users section.
4. Check the “**Create a New User**” radio button and click the “**Next**” button.
5. You will be presented a new user form. The fields that will need to be filled in are:
  - a. First Name
  - b. Last Name
  - c. Address Line 1
  - d. City
  - e. State (Drop-down)
  - f. Postal Code (Zip Code)
  - g. Country (Drop-down) – leave as “USA”
  - h. Home Phone number – for verification code to be sent
  - i. Mobile Phone number – for verification – **not required**
  - j. E-mail address – for notifications
  - k. Username
  - l. Password and Verify Password – the same for both – make sure it is 8 characters with at least 1 capital letter and 1 number
6. Once the form is filled out, click on the “**Save Changes**” button.
7. If everything was successful, you will see the User detail with the list of accounts below with an “**Access**” and “**Limits**” link beside each one.
8. **Access** – You will need to look over each tab to make sure this user has the abilities as intended for each account. You will need to click on the “**Save Changes**” button before navigating to a new tab.

#### Account Reporting

<a href="#">Account Reporting</a>	<a href="#">Information Reporting</a>	<a href="#">Account Transfer</a>	<a href="#">Dynamic Transfers</a>	<a href="#">External Transfer</a>	<a href="#">ACH</a>	<a href="#">Wire Transfer</a>	<a href="#">Bill Pay</a>	<a href="#">Positive Pay</a>	<a href="#">Stop Pay</a>	<a href="#">Alerts</a>	<a href="#">Services</a>
<a href="#">Check All</a> <a href="#">Uncheck All</a>											
<input checked="" type="checkbox"/> Account Balance											
<input checked="" type="checkbox"/> Account History											
<input checked="" type="checkbox"/> Change Address											
<input checked="" type="checkbox"/> View Check Image											
<input checked="" type="checkbox"/> View Statement											
<input type="button" value="Save Changes"/>											

9. **Limits** – You will need to look over each tab to make sure this user has the transactional limits as intended for each account. You can set transaction limits as well as daily, weekly and monthly limits as needed. You will need to click on the “**Save Changes**” button before navigating to a

new tab.

Account Transfer

<a href="#">Account Transfer</a>	<a href="#">External Transfer</a>	<a href="#">Recurring Transfers</a>	<a href="#">ACH Batch</a>	<a href="#">Recurring ACH</a>	<a href="#">Wire Transfer</a>	<a href="#">Recurring Wire Transfer</a>
<b>Transaction Limits</b>	<b>Min</b>	<b>Max</b>	<b>Daily Limits</b>	<b>Max</b>	<b>Weekly Limits</b>	<b>Max</b>
Transfer From	0.01	<input type="text"/>	Transfer From	<input type="text"/>	Transfer From	<input type="text"/>
		Max: \$999999.00		Max: \$999999.00	Approve	<input type="text"/>
Approve	0.01	<input type="text"/>	Approve	<input type="text"/>	Modify	<input type="text"/>
Modify	0.01	<input type="text"/>	Modify	<input type="text"/>	Release	<input type="text"/>
Release	0.01	<input type="text"/>	Release	<input type="text"/>		
<b>Monthly Limits</b>	<b>Max</b>	<b>Rolling Limits</b>	<b>Max</b>	<b>Rolling Days</b>		
Transfer From	<input type="text"/>	Transfer From	<input type="text"/>	<input type="text"/>		
Approve	<input type="text"/>	Approve	<input type="text"/>	<input type="text"/>		
Modify	<input type="text"/>	Modify	<input type="text"/>	<input type="text"/>		
Release	<input type="text"/>	Release	<input type="text"/>	<input type="text"/>		
<input type="button" value="Save Changes"/>						

### Other Notes

- A company admin can also reset passwords and lock and unlock the other users from this Company admin section.
- If you have any questions on this setup, please call us at (615) 236-2963.