

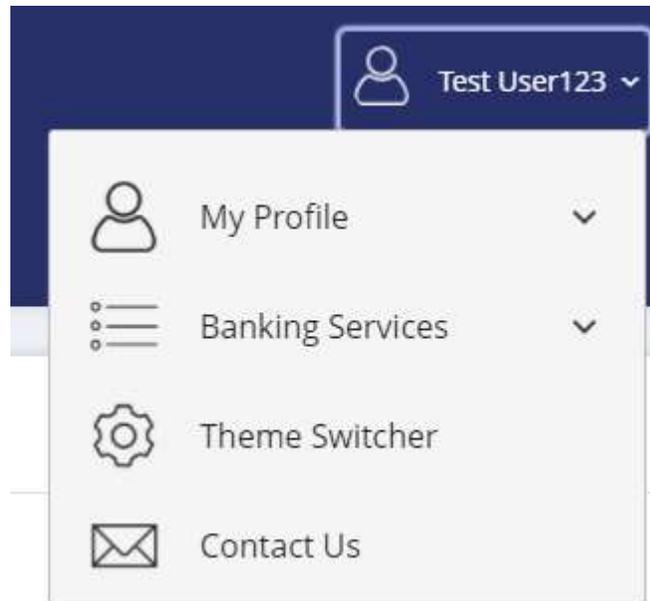
Adding and Managing Authorized Users

The following steps can be used by Business Administrative users who want to create authorized users to their profile. Please note that the system will not allow the Admin to assign access to a service that the overall business has not been enrolled into by HarborOne.

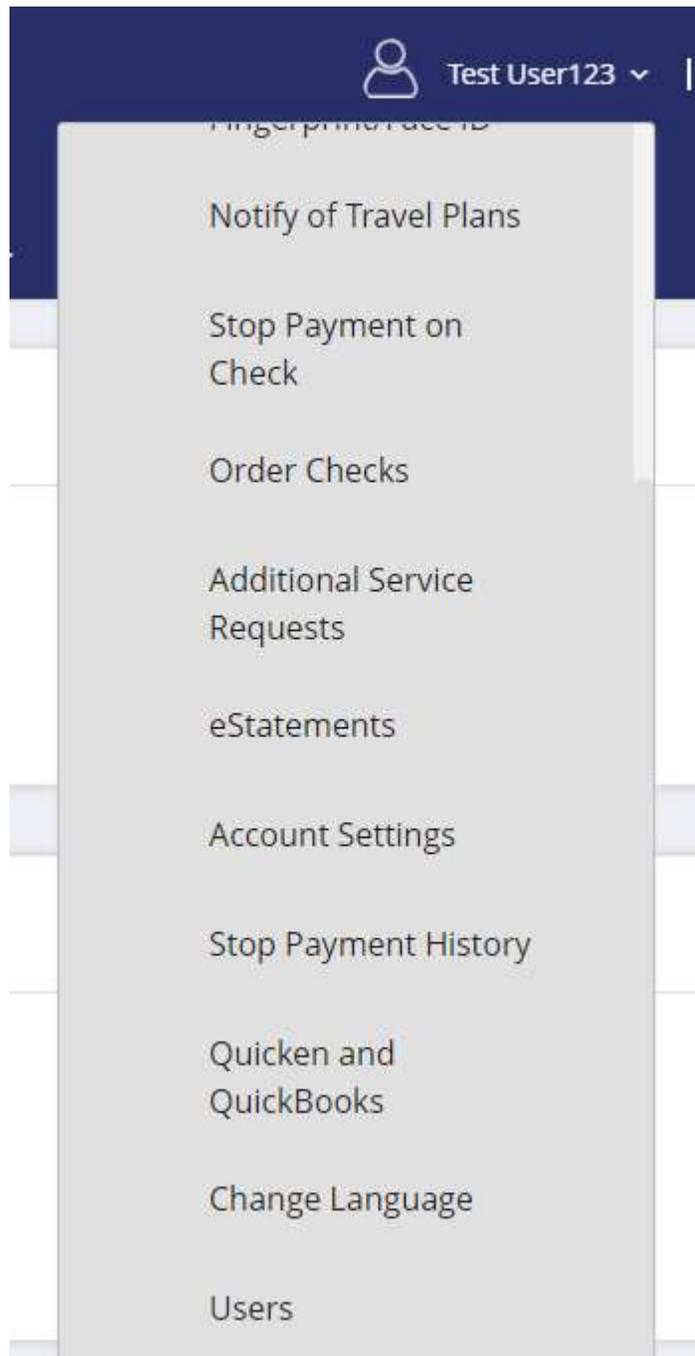
Once an authorized user has been created, it is the responsibility of the Administrator to manage this User. This includes removing users who are no longer with the company and assisting them when they have forgotten their password and have locked out their profile. Please note that for security reasons, HarborOne Customer Service Representatives are unable to assist with resetting a password or unlocking a profile for an authorized user unless they have been given the “Administrator” entitlement.

Please follow the steps below to set up an authorized user:

1. Navigate to your name at the top right of the page and click on the dropdown arrow
2. Click on the ‘Banking Services’ option



3. Click on 'Users'



4. Click on the 'Add User' button



5. Enter all required fields on the User Details page and click 'Save'

User Details

<p>* User ID <input type="text"/></p>	<h4>Contact Information</h4>
<p>* Temporary Password <input type="text"/></p>	<p>* Email Address <input type="text"/></p>
<p>* Confirm Password <input type="text"/></p>	<p>* Home Phone <input type="text"/>-<input type="text"/>-<input type="text"/></p>
<p>Status <input checked="" type="radio"/> Active <input type="radio"/> Disabled <input type="radio"/> Locked</p>	<p>Mobile Phone <input type="text"/>-<input type="text"/>-<input type="text"/></p>
<h4>Personal Information</h4>	<p>Work Phone <input type="text"/>-<input type="text"/>-<input type="text"/> ext. <input type="text"/></p>
<p>Title <input type="text"/></p>	<h4>Home Address</h4>
<p>* First Name <input type="text"/></p>	<p>Address Line 1 <input type="text"/></p>
<p>Middle Name <input type="text"/></p>	<p>Address Line 2 <input type="text"/></p>
<p>* Last Name <input type="text"/></p>	<p>City <input type="text"/></p>
<p>Suffix <input type="text"/></p>	<p>State <input type="text" value="v"/></p>
<p>Birth Date <input type="text" value="MM/DD/YYYY"/></p>	<p>ZIP Code <input type="text"/></p>
<p>Social Security Number <input type="text"/></p>	
<p><input type="button" value="Cancel"/> <input type="button" value="Save"/></p>	

Required fields are marked by an asterisk. However, please note that in order for our Customer Service Department to assist with unlocking someone designated as an Administrator, they must be able to be fully validated based on the information provided but are not necessarily required above.

- Select or copy from another user, the entitlements to enable each feature that you would like the authorized user to have access to. (Please read the “Important Information about Additional Users” disclosure before you begin. Also, if you provide access to the Wire Transfer and/or ACH services, the user will need a security token before they are able to initiate transactions. Once you are finished adding the user, please send us a secure message with the user’s name and request for a token.)

Copy Entitlements

Please select a user you want to copy the entitlements from below.

Entitlements will be copied from User ID: **user** to User ID: **TestUser456**.

Cancel

Copy

Entitlements for Test User

[Return to Service Center](#)

Checking this box will mark this user as a 'Business Administrator'. A 'Business Administrator' will automatically be granted the same entitlements/limits as the business.

Entitlement	Limit	<input type="checkbox"/>
Accounts	?	<input checked="" type="checkbox"/>
BAI2 Export	?	<input checked="" type="checkbox"/>
Master Line Account Access	?	<input type="checkbox"/>
Merchant Capture	?	<input checked="" type="checkbox"/>
Stop Payments	?	<input checked="" type="checkbox"/>
ACH »	?	<input type="checkbox"/>
ACH Whitelist »	?	<input type="checkbox"/>
Bill Pay	?	<input type="checkbox"/>
Cards	?	<input type="checkbox"/>
eDocuments	?	
View Tax Documents	?	<input type="checkbox"/>
eNotices	?	<input checked="" type="checkbox"/>
View External Documents	?	<input type="checkbox"/>
Entitlements	?	

Manage Users	?	<input type="checkbox"/>
Primary User	?	<input type="checkbox"/>
Spending	?	<input checked="" type="checkbox"/>
Transfers	?	<input checked="" type="checkbox"/>
Maximum Transaction Limit	?	\$ 10.00 <input type="text" value="10.00"/>
Maximum Daily Limit	?	\$ 10.00 <input type="text" value="10.00"/>
Manage External Accounts	?	<input type="checkbox"/>
Manage Unlinked Accounts	?	<input type="checkbox"/>
Wires »	?	<input type="checkbox"/>

Accounts	All Entitlements	Check Re-Order	Merchant Capture	Stop Payments	View	ACH Whitelist	Bill Pay	eStatements	Transfer From	Transfer To
Select All Accounts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
<input type="checkbox"/> 49 - Business Value Checking	<input checked="" type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
<input type="checkbox"/> 21 - Business Advantage Sav-MA	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

7. Click **Save** and then **Confirm** to update the changes.

Please review the following changes.

Entitlement	Limit	Old	New
Entitlements			
Manage Users		×	☒

Please follow the steps below to manage an existing Authorized User:

As an Administrator, you may log in and edit an authorized user's information, edit their entitlements, or delete them entirely at any time. If you gave the Authorized User the Administrator role, they too will have the ability to add and edit other users.

Follow steps 1 through 3 above. Once on the Users page, select one of the editing options to edit the User.

Users

Name ↓	User Type	User ID	Status	Last Login		User Type
Test User	Business User (Administrator)	TestUser456	Active		  	Administrator



= Edit User



= Edit User Entitlements



= Delete User