Bar Harbor Business Online: User Management

Business administrators can use **Manage Users** to create and manage business users. Admins can also assign user roles, manage account access, and set permissions.

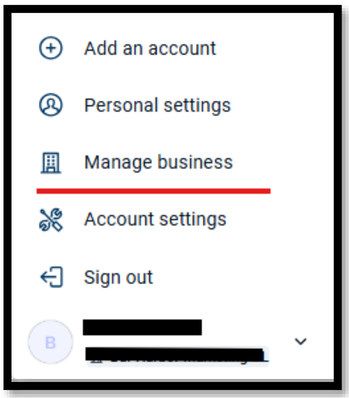
To access **Manage Users**, go to **My profile**, and then select **Manage Business**. By default, the Manage Users table appears in Settings. On this screen, an admin can create a user and search for and filter through users. The admin can also select users to view their user profile.

The **Manage Users** table displays each business user's name, role, and status.

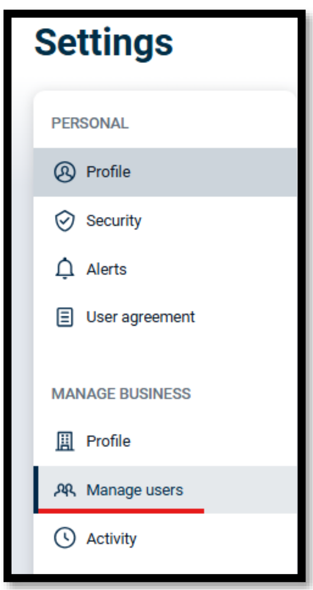
CREATING A BUSINESS USER

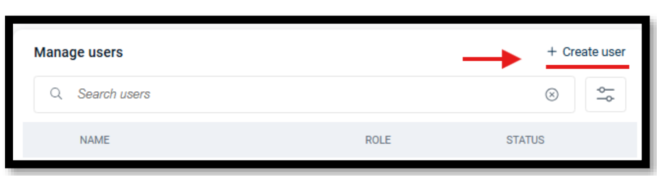
To create a business user, a user must have the Admin role and Create User permission.

1. In the main menu, select **My profile**, and then select **Manage Business**.



2. Under Settings select **Manage Users** and then **Create User**

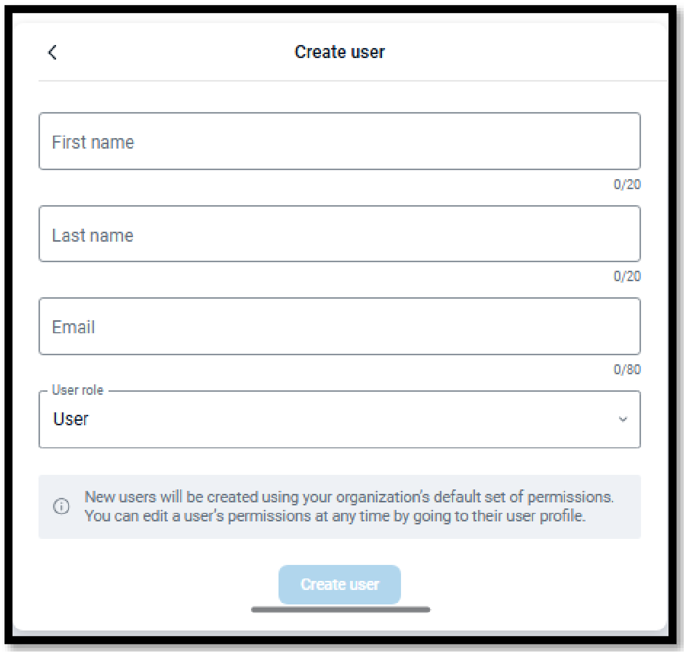




3. Enter user's **First name**, **Last name**, **Email address**, and select a User role.

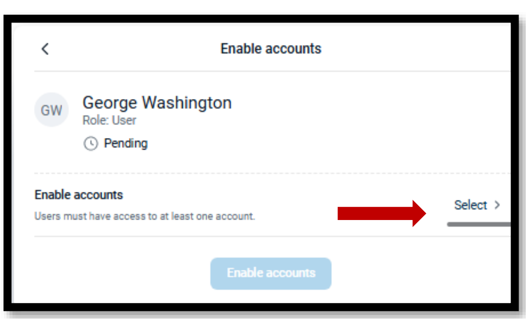
    - ***User*** *- can have customized permissions and account access but cannot manage other users*
    - ***Viewer*** *– view only access on specified accounts*
    - ***Admin*** *- can have customized permissions and account access as well as user management*

Please contact the Business Online team to reassign the primary Admin at businessonline@barharbor.bank

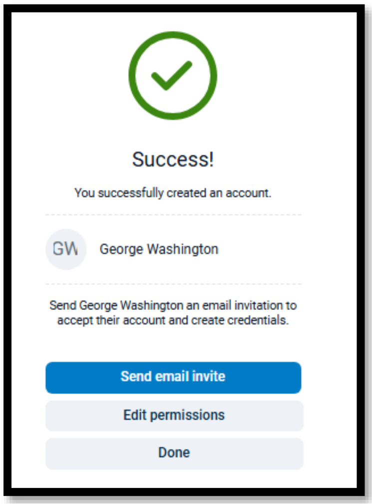


NOTE: A user must be an **individual person** and should not be another company or bookkeeping office.

4. Select **Create user -** A window may appear asking the business admin to confirm their credentials to continue creating the user. Once verification is complete, the *Enable accounts* screen appears.
5. Select **Enable accounts**. The admin must give the user access to at least one account. The *Account access* screen appears.



6. For each account, use the sliders to turn account access on or off.
7. Select **Done**. The admin is returned to the *Enable accounts* screen.
8. Select **Enable accounts**. The *Success!* screen appears.



9. Review your confirmation and select the following options:
   a. Select **Send email invite** to send an email to the user to invite them to create their username and password to access Business Online.
   b. Select **Edit permissions** to modify entitlements and account access prior to sending the email invite.
   Company Default permissions are automatically assigned to new users. Select this option to change the user's permissions.
   c. Select **Set Permissions**
   In each feature's permission section, use toggles to activate and deactivate the features and their related permissions.
   d. Select **Done**. Send the invite from the Manage Users screen

The new user will appear as **Pending** on the Manage Business page. Their status will change to **Active** once they set up their credentials.

NOTE: You can modify permissions, account access, or manage the invite at any time by clicking the user's name.

USER PROFILE -editing or deleting a user

Business administrators can access business user profiles by navigating to the main menu, selecting **My profile**, and then selecting **Manage Business**.

An admin can select a user from the list of users in the **Manage Users** table to view their user profile.

From the user profile, an admin can view the user's name, role, status, email, and account access. Select the ellipsis in the user profile box to:

- Edit a user
- Hold account access
- Send a password reset link
- Delete a user

An admin can also:

- Set permissions
- Set account access and account-specific permissions

PERMISSIONS

A business user can only access and use a feature if the related permissions are turned on.

User Permissions

1. In the main menu, select **My profile**, and then select **Manage Business**.
2. In the **Manage User** table, search for, and then select a user.
3. In the Permissions section, select Set permissions.
4. In each feature's permission section, use the toggles to activate and deactivate the features and their related permissions.