



## Video Transcript

### Regions Online Banking for Business | How to Edit an Existing User or Add a New User

**Note:** Upbeat music begins to play.

**On screen:** Regions Logo appears. The green triangle of the Regions logo turns and morphs into a play button icon.

**[Voice-over]** How to Edit an Existing User or Add a New User.

**On screen:** An arrow clicks the play button and an illustration of two people with a plus sign scales up to the center of the screen.

**[Voice-over]** Once you've logged in to Online Banking, go to the **Customer Service** menu, then select **Settings** and then **Manage Users**.

**On screen:** The Regions Online Banking screen slides in with the Accounts section visible. The arrow selects the "Customer Service" link from the main menu then selects "Settings" from the dropdown menu. The Customer Service page appears showing the Settings options. The arrow moves down the page to the "Manage Users" link and selects it. The Manage Users page appears.

**[Voice-over]** From the Manage Users page, you can edit permissions for an existing online banking user or add a new user.

**On screen:** The arrow moves down the page to show all the users and if they have access or not. Access is shown using a green on/off switch. A teal "Add a User" link is below the list of existing users.

**[Voice-over]** To edit permissions for an existing user, locate the user's name on the list and select the corresponding row. You'll be prompted to complete additional security steps to verify your identity.

**On screen:** The arrow moves up the page clicks on a user. A security message pop up appears that reads:

**Pardon the interruption. We need to take additional steps to verify your identity.**



1. Shortly, you will receive a SMS Text from Regions at XXX-XXX-0803 asking you to enter your security code.
2. Enter your security code on your phone to confirm your identity.
3. After Regions receives and validates this information, you will be able to proceed.

If you do not have access to your phone, or you think this was triggered in error, you can cancel and talk to your administrator.

**[Voice-over] Edit User** information as needed, then select **Update** to save your changes.

**On screen:** The “Edit User” page appears with user details including name, email, user ID, phone number, contact method, and secondary phone number. Other information includes an on/off switch option to make the user an administrator or not and if the user is active with Rooba access. The arrow moves to the secondary phone number and clicks it. An Edit User pop up appears and the arrow moves down the page to change the phone number then clicks the “Update” button. The pop up disappears to go back to the “Edit User” main page.

**[Voice-over]** You’ll receive a confirmation message.

**On screen:** A message appears and fades up to the center of the page that says, “Congratulations! You have successfully updated Amanda Purchase.”

**[Voice-over]** To **Add a New User**, select the link. You’ll be prompted to complete additional security steps to verify your identity.

**On screen:** The message fades back and the arrow moves up the page and clicks on the teal “Manage Users” link. The “Manage Users” page appears. The arrow scrolls down the page and clicks on the teal “Add a User” link. A security message pop up appears that reads:

**Pardon the interruption. We need to take additional steps to verify your identity.**

4. Shortly, you will receive a SMS Text from Regions at XXX-XXX-0803 asking you to enter your security code.
5. Enter your security code on your phone to confirm your identity.
6. After Regions receives and validates this information, you will be able to proceed.

If you do not have access to your phone, or you think this was triggered in error, you can cancel and talk to your administrator.



**[Voice-over]** Then follow the four steps to:

**On screen:** The “Add a User” page appears showing the first step but highlighting the four steps tab at the top of the page. Step One: Add User Info, Step Two: Assign Permissions, Step three: Set Permission Limits, Step Four: Confirm.

**[Voice-over]** Enter **User Information**

**On screen:** The arrow scrolls down the page to click the orange “Next” button.

**[Voice-over]** **Assign Permissions**

**On screen:** The arrow scrolls back up the page showing the Step Two tab. The arrow clicks on the “Choose permissions” drop down menu and selects a name then clicks the orange “Next” button. The “Select Accounts and Services” option is displayed. The arrow clicks on the orange “Next” button.

**[Voice-over]** **Set Permission Limits** for ACH Payments and Wire Transfers

**On screen:** The Step Three tab appears with ACH questions to approve ACH batches, set another’s ACH submission limits, and a yes or no switch to select if you can set another to manage ACH receivers and templates. The arrow scrolls down the page to click the orange “Next” button. The Wires options appear that include questions to approve another wire transfers, set another’s wire transfer limits, and can another manage wire transfer templates. The arrow moves down the page and clicks on the orange “Continue” button.

**[Voice-over]** And **Confirm** all information is correct.

**On screen:** The Step Four tab appears with all the information filled out from the previous steps. The arrow scrolls down the page to click the orange “Confirm and Save” button.

**[Voice-over]** Once you have completed the needed steps, you’ll receive confirmation that your User has been added.

**On screen:** The “Manage Users” page appears with a confirmation message that reads, “Congratulations! You have successfully added Fine Employee. Remember to provide the User ID and Password to this User.”



**On screen:** Screen fades to white with the Regions logo and disclosures.