Business Solutions- Quick Reference Guide

System Access

A company's initial Administrator role user is set up by Berkshire Bank. All subsequent company users are set up by the company's Administrator directly in Business Solutions. To access Business Online Banking follow the steps below. The first time includes changing your initial password, as follows:

1. On the sign on page (www.berkshirebank.com) choose Business Solutions and then enter your Company ID and User ID.
2. You will be prompted to select a method of contact (phone or text message) to complete the secure log in authentication. Follow the on screen prompts.
3. Once you enter your secure code, the password page will appear.

NOTE: *Passwords are case sensitive and must be 8-12 characters and include a combination of 3 of the 4 following types of characters: lower case letters, upper case letters, number or special characters: # $ @ ! % ^ & *) (_ + = | / ? ; : . } { - [ ]*

Navigation

The menu bar is located at the top of the application page and is always displayed. The menu bar consists of five main menus that group similar Business Online Banking services together.

NOTE: *Access to the menus and submenus is dependent on the services offered through your entitlements.*

The main menus are:

- **Welcome**—allows you access to the *Welcome* page. The *Welcome* page includes links to view unread mail and alert messages, next schedules, requests, favorites, saved reports, and account balance reports.
- **Reports**—provides access to Account Reports, Deposit Account Reporting, Deposit Reporting, Loan Reports, Downloadable Reports, Statements and Documents, Wire Reports.
- **Transfers and Payments**—provides access to Scheduled Requests, Internal Transfer, Loans, Bill Pay (Business Bill Pay), ACH (Make Payments, Collect Money, and ACH File Upload), and Wire.
- **Account Services**—provides access to Stop Payment, Positive Pay, and Account Reconciliation.
- **Administration**—provides access to Communications, Company Administration, and Self Administration.

In addition, each action page within your online banking session has a "how do I" help menu at the bottom of the screen for additional guidance.

Creating a New User

To add a new user, follow the steps below.

1. Under the Administration tab, select Manage Users.
2. Select Create New User
3. The system will guide you through setting up the User Profile, Roles, Services & Accounts, Limits and Verification settings.

If you need additional assistance with the process or any part of our system please call **1-888-413-1743**