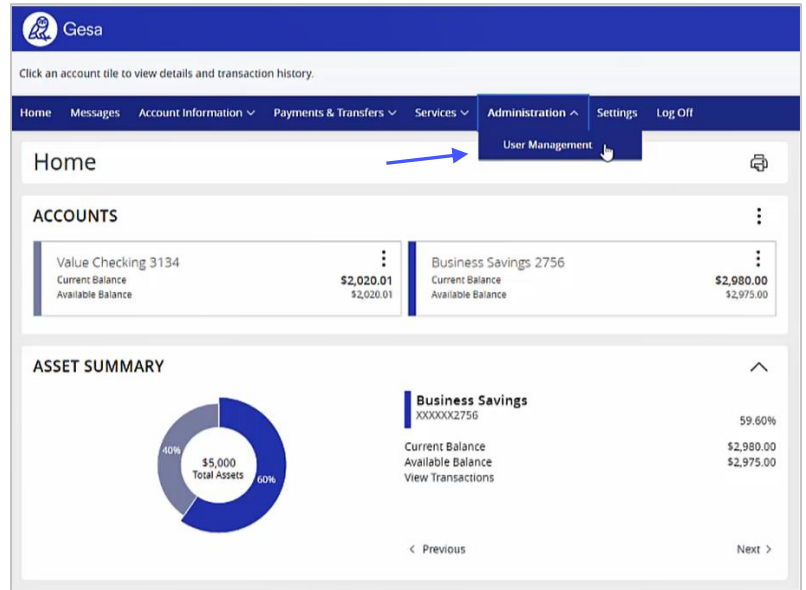


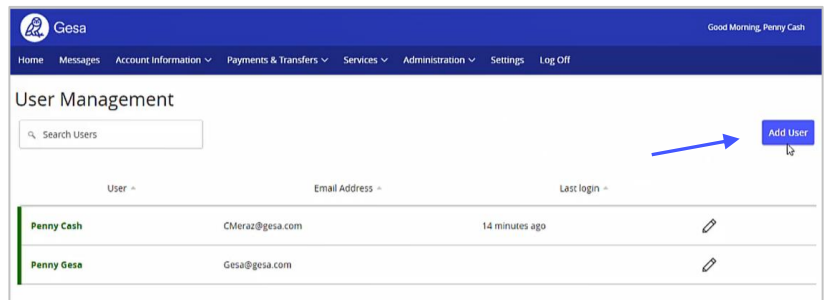


Creating New Users

1. Select the “Administration” menu, then select “Users Management”.



2. Click the “Add User” button on the right side of the screen.



3. Enter the required fields for the new user.

NOTE: If the chosen user ID is already in use it will not allow you to save.

NOTE: Password assignment is temporary. The user will be asked to change the password upon initial log in.

4. Click the “Save New User Details” button on the bottom right-hand corner of the screen.



- Click on each Transaction Type to configure the user's entitlements and limits.

Sample User
User Policy ②

Transactions Features Accounts

Filter: All Enabled Disabled

Funds Transfer
Can view own transactions
Can Draft/Approve/Cancel
\$999,999,999.99

Stop Payment
Can view own transactions
Can Draft/Approve/Cancel

FUNDS TRANSFER Enabled

Rights

☐ Draft Restricted ☒ Draft ☒ Approve ☒ Cancel ☒ View

Approval Limits

	Maximum Amount	Maximum Count
Per Transaction	\$ 999,999,999.99	
Daily Per Account	\$ 999,999,999.99	999
Daily	\$ 999,999,999.99	999

- Choose the user's transaction rights by checking the appropriate boxes under "Rights".
- Click on the drop-down menu to adjust the view rights.
 - All: Can view transactions initiated by any user within the company.
 - Account: Can view transactions initiated within accounts the user is entitled to online.
 - Own: Can only view the user's own transactions.
 - None: Cannot view any transactions.

FUNDS TRANSFER Enabled

Rights

☐ Draft Restricted ☒ Draft ☒ Approve ☒ Cancel ☒ View

Approval Limits

	Maximum Amount	Maximum Count
Per Transaction	\$ 999,999,999.99	

- In the "Approval Limits" section, enter the user's transaction dollar and count limits.

NOTE: Repeat steps 5 - 8 for each transaction type.

Approval Limits

	Maximum Amount	Maximum Count
Per Transaction	\$ 999,999,999.99	
Daily Per Account	\$ 999,999,999.99	999
Daily	\$ 999,999,999.99	999
Monthly	\$ 999,999,999.99	999



9. Click on the “Features” tab.
10. Select the appropriate non-transactional features the user should have enabled.

Sample User
User Policy ⓘ

Transactions Features Accounts

FEATURES ⓘ

RIGHTS

- ☒ Access to all payment templates
- ☒ Can view all recipients
- ☒ Manage Recipients
- ☒ Manage Users
- ☒ Statement Image

CUSTOM FEATURES

- ☒ Loan Payments
- ☒ Member to Member Transfer
- ☒ Paymentus Integration
- ☒ eStatement Preferences

Save

11. On the “Accounts” tab, designate the user’s account rights.
 - a) Circle with a slash: Access is disabled but can be enabled.
 - b) Checkmark: Access is enabled.

12. Click the “Save” button in the top right corner of the screen.

Sample User
User Policy ⓘ

Transactions Features Accounts

ACCOUNTS ⓘ

2 of 2 accounts shown

Number	Name	View ☒	Deposit ☐	Withdraw ☒
XXXXXX3134	Value Checking	✓	✓	✓
XXXXXX2756	Business Savings	✓	✓	✓

Save