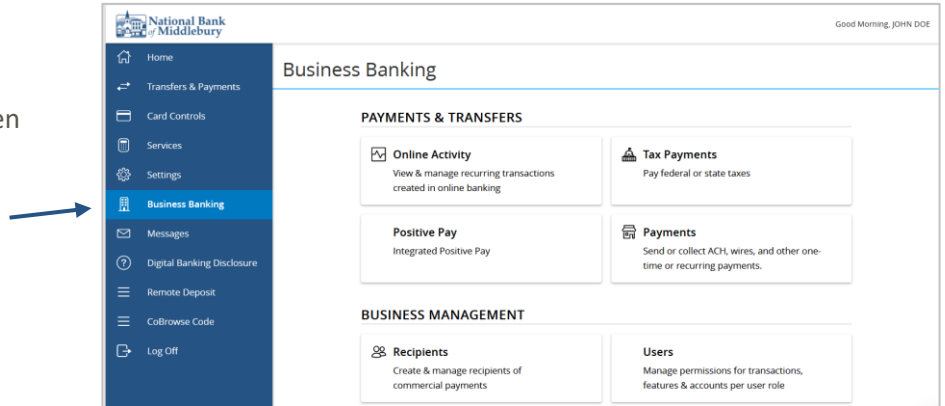
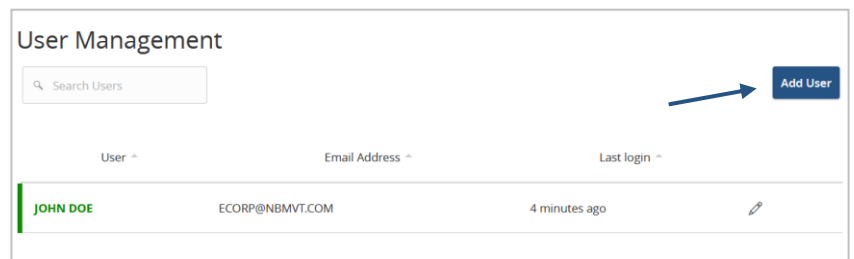


Creating New Users

1. Select the 'Business Banking' menu and then select 'Users'.



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



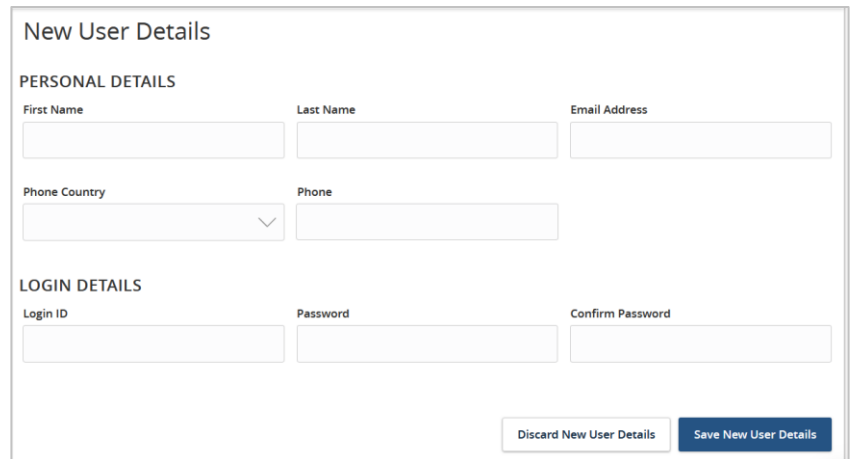
3. Enter the required fields for the new user.

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

NOTE: User will be disabled and cannot login until the bank confirms the New User's permissions with the company administrator.

NOTE: Password assignment is temporary. User must login and change password within 72 hours before the password expires.

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



Questions? We're here to help.
Customer Service: 877.508.8455



5. Click on each Transaction Type to configure the user’s entitlements and limits.

Sample User Save

User Policy ⓘ

Transactions | Features | Accounts

Transaction Filter:

Filter: **All** Enabled Disabled

ACH Batch

Can view own transactions
Can Draft/Approve/Cancel
\$10,000,000.00

ACH BATCH Enabled

Rights

Draft Restricted Draft Approve Cancel View

ACH Collection

Can view own transactions
Can Draft/Approve/Cancel
\$10,000,000.00

Bill Payment

Can view own transactions
Can Draft/Approve/Cancel

Change of Address

Can view own transactions
Can Draft/Approve/Cancel

6. 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 within digital banking
 - Own: Can only view the user’s own transactions.
 - None: Cannot view any transactions.

ACH COLLECTION Enabled

Rights

Draft Restricted Draft Approve Cancel View

Approval Limits

	Maximum Amount	Maximum Count
Per Transaction	\$ 10,000,000.00	
Daily Per Account	\$ 10,000,000.00	1000

Questions? We’re here to help.
Customer Service: 877.508.8455





7. 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	\$ 10,000,000.00	
Daily Per Account	\$ 10,000,000.00	1000
Daily	\$ 10,000,000.00	1000
Monthly	\$ 75,000,000.00	2000

8. Click on the 'Features' tab.

9. On the 'Features' tab, select the appropriate non-transactional features.

Sample User Save

User Policy ⓘ

Transactions **Features** Accounts

FEATURES ⓘ

🔍

RIGHTS

- Access to all payment templates
- Allow one-time recipients
- Can view all recipients
- Enable Centrix Positive Pay
- Manage Recipients
- Manage Users
- Recipient upload from batch
- View Wire Activity

CUSTOM FEATURES

- Card Management
- Glia CV Integration

Questions? We're here to help.
Customer Service: 877.508.8455





10. 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.
11. Click the 'Save' button in the top right corner of the screen.

Sample User Save

User Policy ?

Transactions Features Accounts

ACCOUNTS ?

1 of 1 accounts shown

Number	Name	View <input checked="" type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
*****4444	SMALL BUSINESS ADVANTAGE E	✓	⊘	⊘

Save

Maintaining Existing Users

1. Click the pencil icon to edit the existing user.
2. Click on 'Assign Rights' towards the bottom right corner of the screen.
3. Follow steps 5-10 in the 'Creating New Users' section above.

User Management Add User

Search Users

User	Email Address	Last login	
JOHN DOE	ECORP@NBMT.COM	34 minutes ago	✎
Sample User	sample@123.com		✎

User Details

Status
Active
[Edit Status](#)

PERSONAL DETAILS

First Name	Last Name	Email Address
Sample	User	sample@123.com
Phone Country	Phone	
United States	(111)111-1111	

USER LOGINS

Login Name	Channel	Status	Last Logon	Actions
Sampleuser123	Internet	Password Change Required		⋮

Cancel Delete **Assign Rights**

Questions? We're here to help.
Customer Service: 877.508.8455

