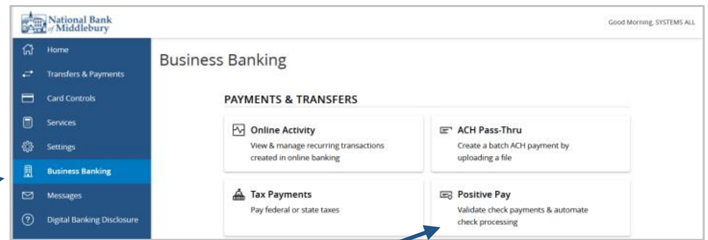
User Setup

National Bank of Middlebury

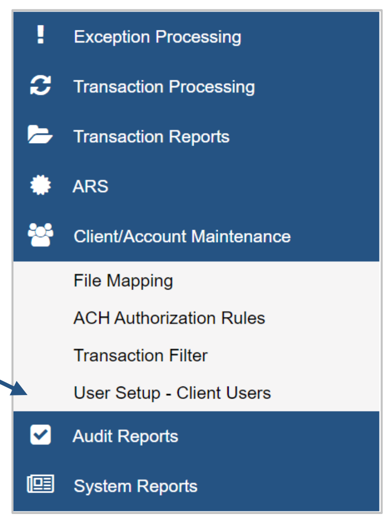
The User Setup page is used by the company administrator to manage users.

1. Select the **'Business Banking'** menu and then '**Positive Pay**'.

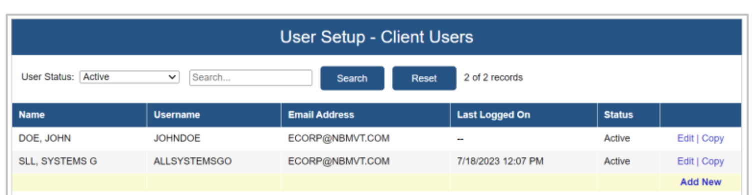


2. Click '**Launch Advanced Options**' button to visit the full Positive Pay site.

3. Select the '**Client/Account Maintenance**' menu then '**User Setup – Client Users**'.



4. Click the '**Add New**' button to set up a new user.



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Customer Service: 877.508.8455

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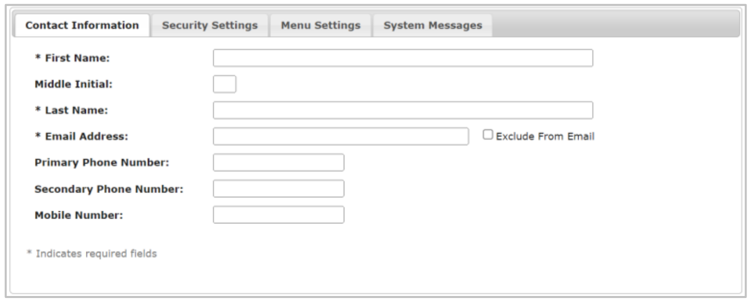
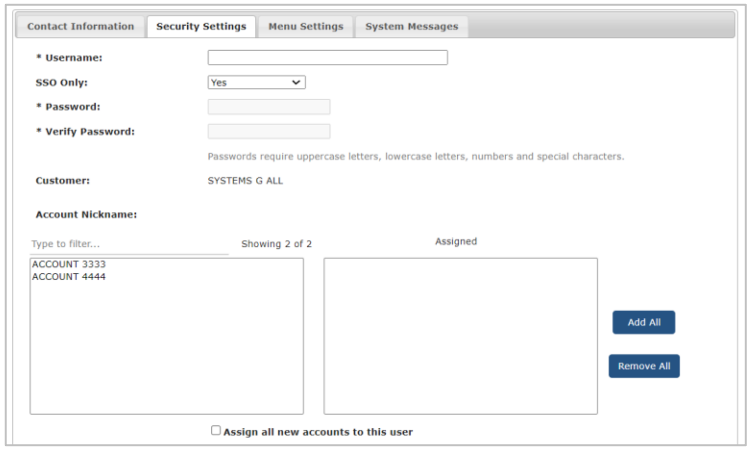
5. On the '**Contact Information**' tab, complete all required fields on the screen which are designated with an asterisk.



6. Click on the '**Security Settings**' tab.
7. Enter the user's current Business Digital Banking Login ID into the '**Username**' field.
8. The '**SSO Only**' field will default to Yes, so there is no need to enter a password.
9. Select the accounts in the box on the left side of the screen the user should have access to. If the user should have access to all accounts, click the '**Add All**' button.
10. Click the '**Assign all new accounts to this user**' option if the user should be automatically granted access to all new accounts opened by the company.



11. Select the '**ACH Reports**' in the box on the left side of the screen that the user should have access to. If the user should have access to all reports, click the '**Add All**' button.
12. Click the '**Assign all new ACH Reports to this user**' option, if the user should be automatically granted access to all new reports created by the company.

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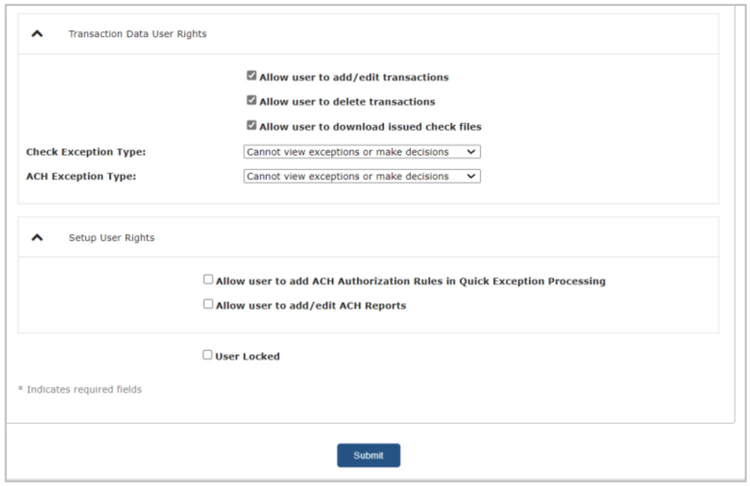
13. Click on '**Transaction Data User Rights**' to expand the listing of rights available to assign to the user. Select all that apply.

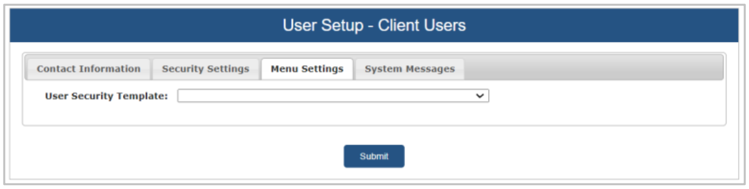
14. Click on '**Setup User Rights**' to expand the listing of rights available to assign to the user. Select all that apply.

15. Click '**User Locked**' to lock the user record if the user should not be allowed to log into the system.



16. Click on the '**Menu Settings**' menu.

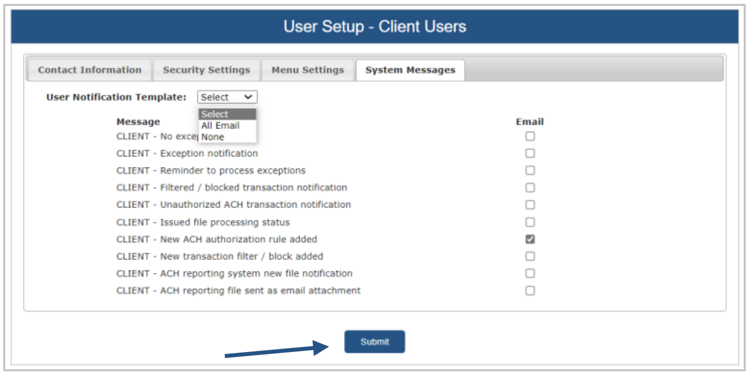
17. Select the '**User Security Template**' the user should have access to.



18. Click on the '**System Messages**' menu to designate the notifications the user should receive.

19. Select an option from the drop-down menu beside '**User Notification Template**' to quickly select the all email notification option.

20. Click '**Submit**' to complete the user setup process.



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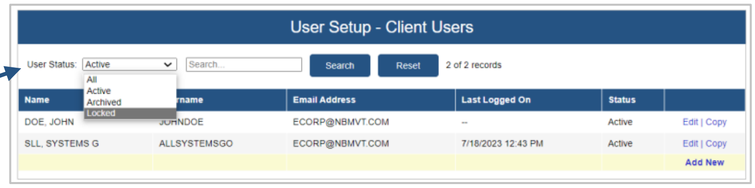
21. To search for an existing user, select the desired '**User Status**' from the drop-down menu, then click the '**Search**' button.



22. Click the '**Edit**' button to edit an existing user or '**Copy**' to copy an existing user.