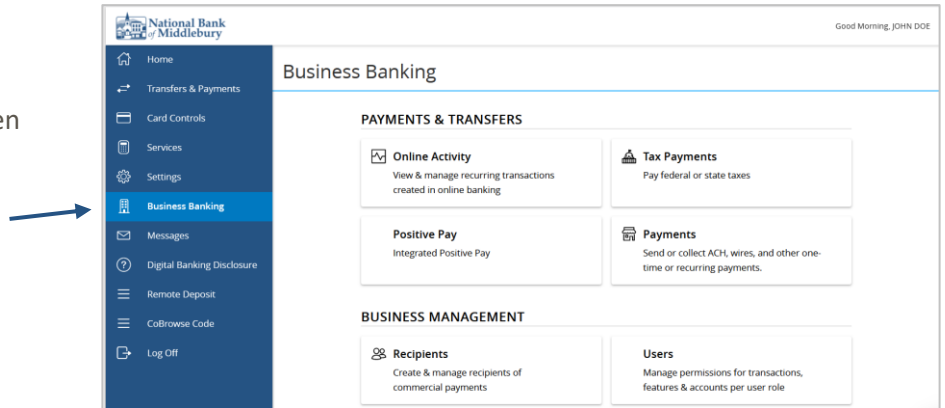
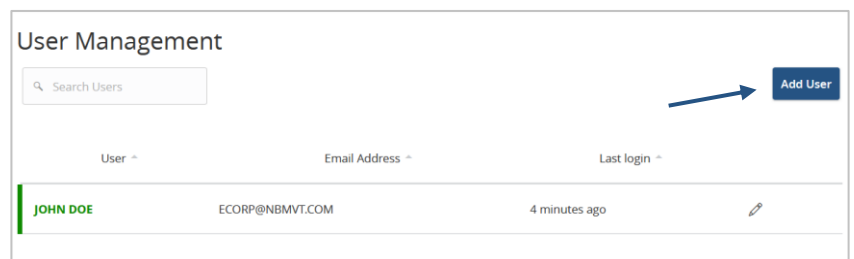


Creating New Users

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



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



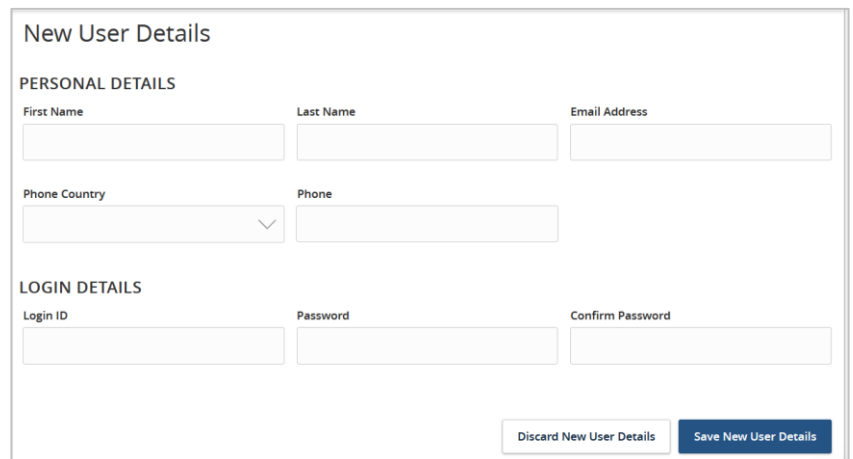
3. Enter the required fields for the new user.

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.



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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

Bill Payment

Can view own transactions
Can Draft/Approve/Cancel

Change of Address

Can view all transactions
Can Draft/Approve/Cancel

Check Reorder

Can view all transactions
Can Draft/Approve/Cancel

BILL PAYMENT Enabled

6. Click on the drop-down menu to adjust the view rights.

- a. All: Can view transactions initiated by any user within the company.
- b. Account: Can view transactions initiated within accounts the user is entitled to within digital banking
- c. Own: Can only view the user’s own transactions.
- d. None: Cannot view any transactions.

FUNDS TRANSFER Enabled

Rights

Draft Approve Cancel View Own

Approval Limits

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

All

Account

Own

None



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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.

FEATURES ⓘ

Q

RIGHTS

- Access to all payment templates
- Can view all recipients
- Enable Centrix Positive Pay
- Manage Recipients
- Manage Users

CUSTOM FEATURES

- Card Management
- Loan Payments
- Gila CV Integration

SSO

- feature.item.featureGroupCustUser/EnableRDC

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- On the 'Accounts' tab, designate the user's account rights.
 - Circle with a slash: Access is disabled but can be enabled.
 - Checkmark: Access is enabled.
- Click the 'Save' button in the top right corner of the screen.

The screenshot shows the 'Sample User' interface with the 'Accounts' tab selected. A table lists account details with columns for Number, Name, View, Deposit, and Withdraw. The 'Deposit' and 'Withdraw' columns for the 'SMALL BUSINESS ADVANTAGE E' account show a circle with a slash, indicating disabled access. A blue arrow points to the 'Accounts' tab, and another points to the slash icon in the 'Deposit' column. 'Save' buttons are visible in the top right and bottom right corners.

Maintaining Existing Users

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

The screenshot shows the 'User Management' list with a search bar and a table of users. The 'Sample User' entry is highlighted, showing the email 'businessservices@nbmvt.com' and 'Last login 4 months ago'. A pencil icon at the end of the row indicates the edit function. A blue arrow points to this icon. An 'Add' button is visible in the top right corner.

The screenshot shows the 'User Details' form for 'Sample User'. It includes sections for 'Status' (Active), 'PERSONAL DETAILS' (First Name: Sample, Last Name: User, Email Address: sample@123.com, Phone Country: United States, Phone: (111)111-1111), and 'USER LOGINS' (Login Name: Sampleuser123, Channel: Internet, Status: Password Change Required). A blue arrow points to the 'Assign Rights' button at the bottom right, which is next to 'Cancel' and 'Delete' buttons.

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