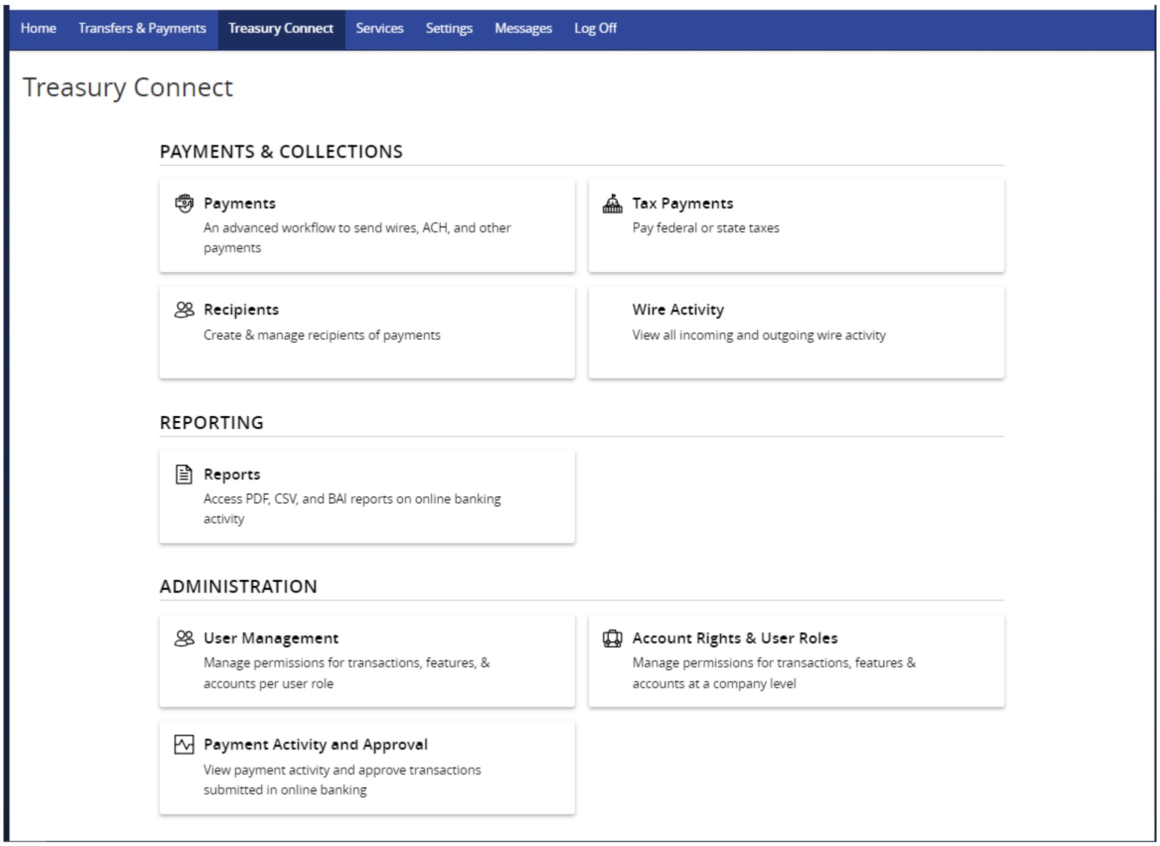
SECURITY NATIONAL BANK
Member FDIC

Editing User Role accounts

If you want to change a User's ability to view, deposit to, or withdraw from accounts, you can edit access to accounts by editing the User Role assigned to the User. Changes take effect the next time that the User logs in.

To edit accounts

1. In the navigation menu, select Treasury Connect > Account Rights and5 User Roles.



2. Select the edit icon in the desired User Role row.

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Member FDIC

User Roles ⓘ

Search

USER ROLE TEMPLATES

USER ROLES

Create Role

Name	Description	Users
Company Admin	Has access to all features, accounts, and enabled trx types with full amount (per Bank policy) for draft, approve, cancel trx rights. The Admin Role also has the maximum Role Approval Limits per Company Policy and the ability to View all User Roles trx activity.	9
Copy of Payables Admin	Has access to non-User or Company Policy related features, all accounts, and enabled payables GT trx types (ACH Single Payment, ACH Payments, ACH Payroll, Pass Thru, Domestic Wire Transfer, & Intl Wire Transfer) with full allowed amount (per Bank policy) for draft, approve, cancel trx rights. The Payables Admin Role also has the maximum Role Approval Limits per Company Policy and the ability to View all User Roles trx activity.	1
Full Company Non Admin	Has access to all features, accounts, and enabled trx types with full amount (per Bank policy) for draft, approve, cancel trx rights.	None
View Only	View Accounts, Stop Payments, Documents	2
View Only	View Only	None
Wire Only	View Accounts, Wire Only, Documents	1

3. Select the Accounts tab to see a list of accounts.

Home | Transfers & Payments | Treasury Connect | Services | Settings | Messages | Log Off

User Roles > Copy of Payables Admin

Delete Save

User Role Policy ⓘ

Transactions | Features | Accounts

ACCOUNTS ⓘ

5 of 5 accounts shown

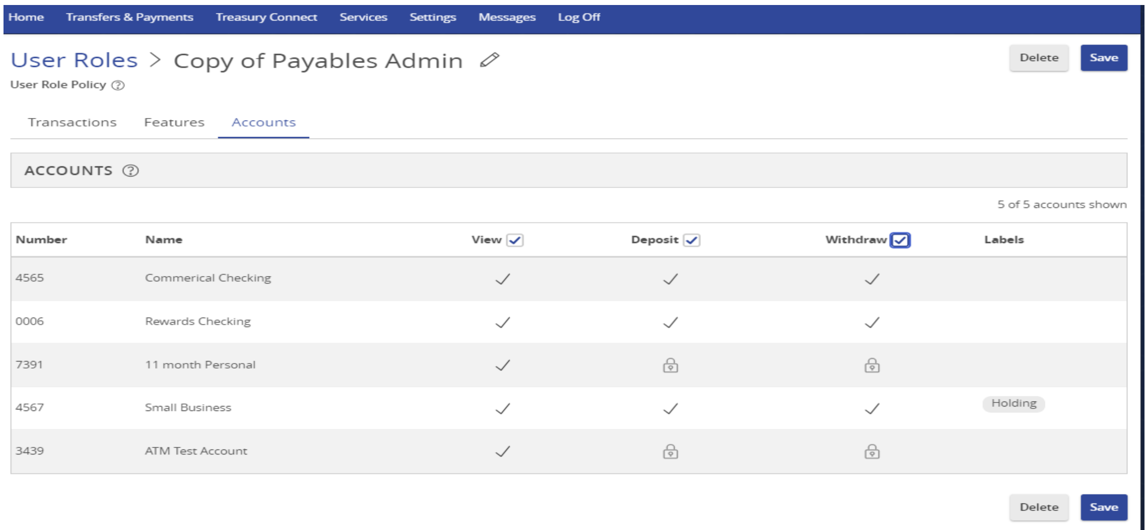
Hide unassigned accounts

Number	Name	View	Deposit	Withdraw	Labels
4565	Commerical Checking	⊘	⊘	⊘	
0006	Rewards Checking	⊘	⊘	⊘	
7391	11 month Personal	⊘	🔒	🔒	
4567	Small Business	⊘	⊘	⊘	Holding
3439	ATM Test Account	⊘	🔒	🔒	

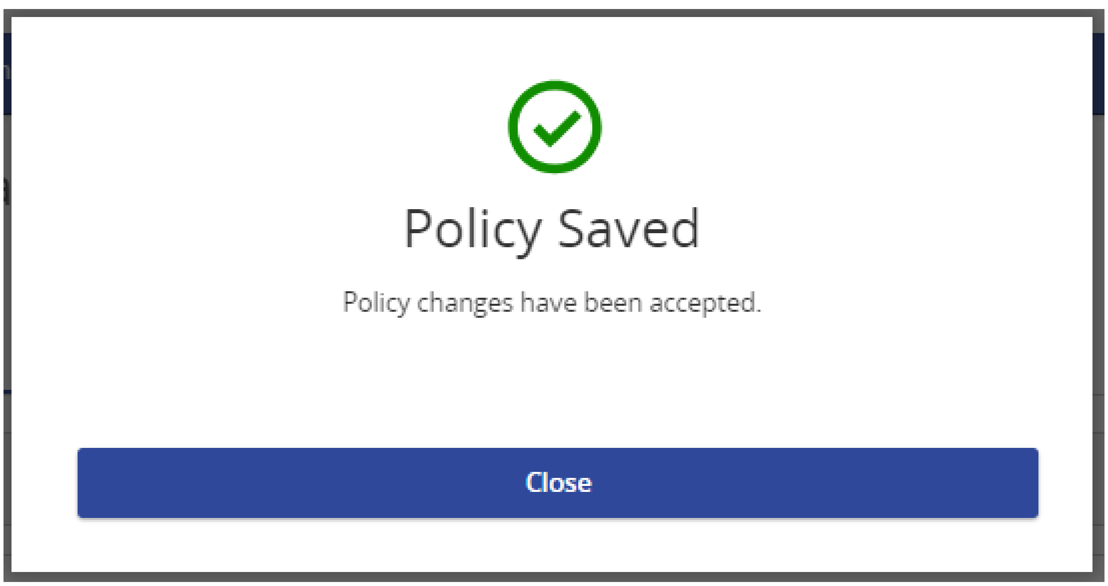
Delete Save

4. Edit one or more of the following access rights:

- View—View balances and history for the account on the Home page, on the Account Details page,
- and in reports.
- Deposit—Deposit funds into the account. This is applicable to the ACH Receipt and ACH Collections Transaction Types.
- Withdraw—Withdraw funds from the account. This is applicable to the ACH Single Payment, ACH Payments, Payroll, Domestic Wire, International Wire, and Tax Payment Transaction Types.



5. Select Save. The Policy Saved page appears confirming the changes.



6. Select Close to return to the Accounts page. Another User may have to approve changes.

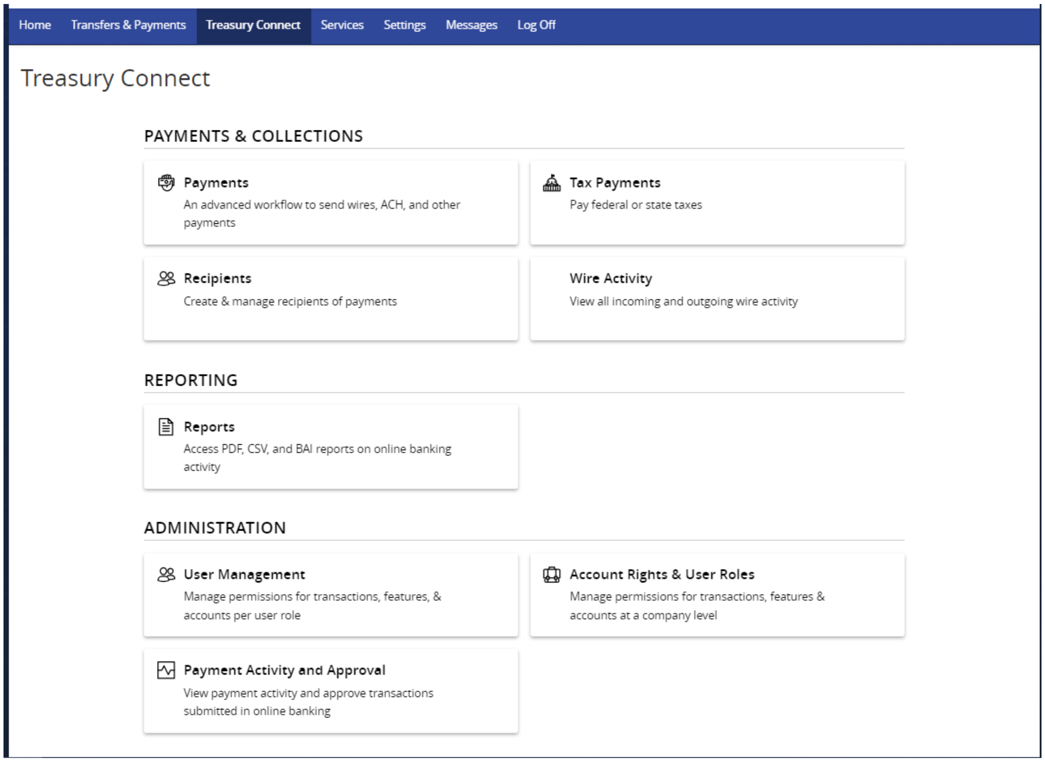
Note: Accounts that have lock icons have been locked by the FI and can't be edited.

Editing User Role features

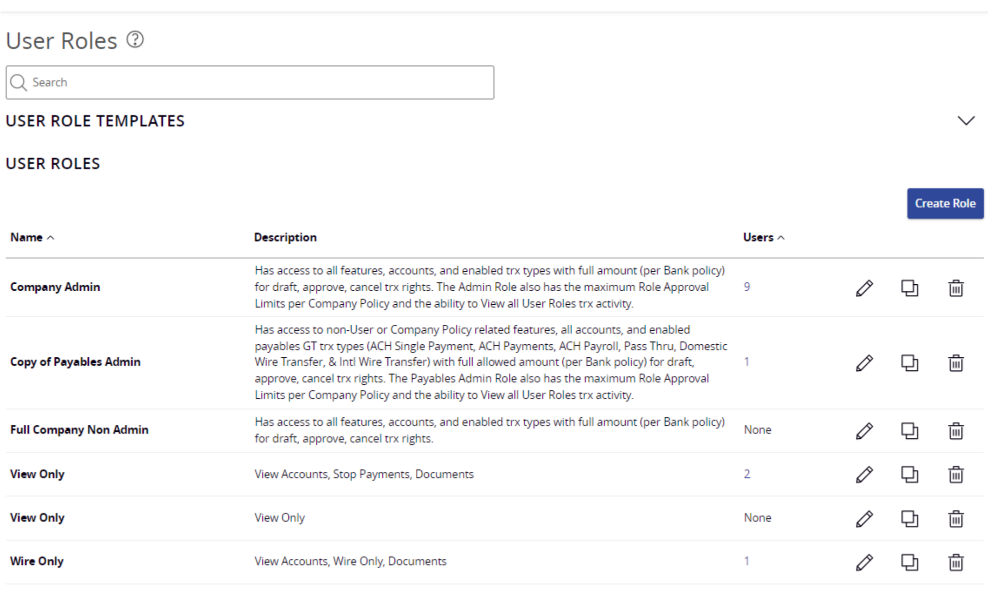
Users can select which rights and features to associate with their accounts. Depending on the configuration, some User Roles may need to have another User approve or reject the changes. Changes take effect the next time the User logs in.

To edit features for a User Role:

1. In the navigation menu, select Treasury Connect > Account Rights and User Roles.

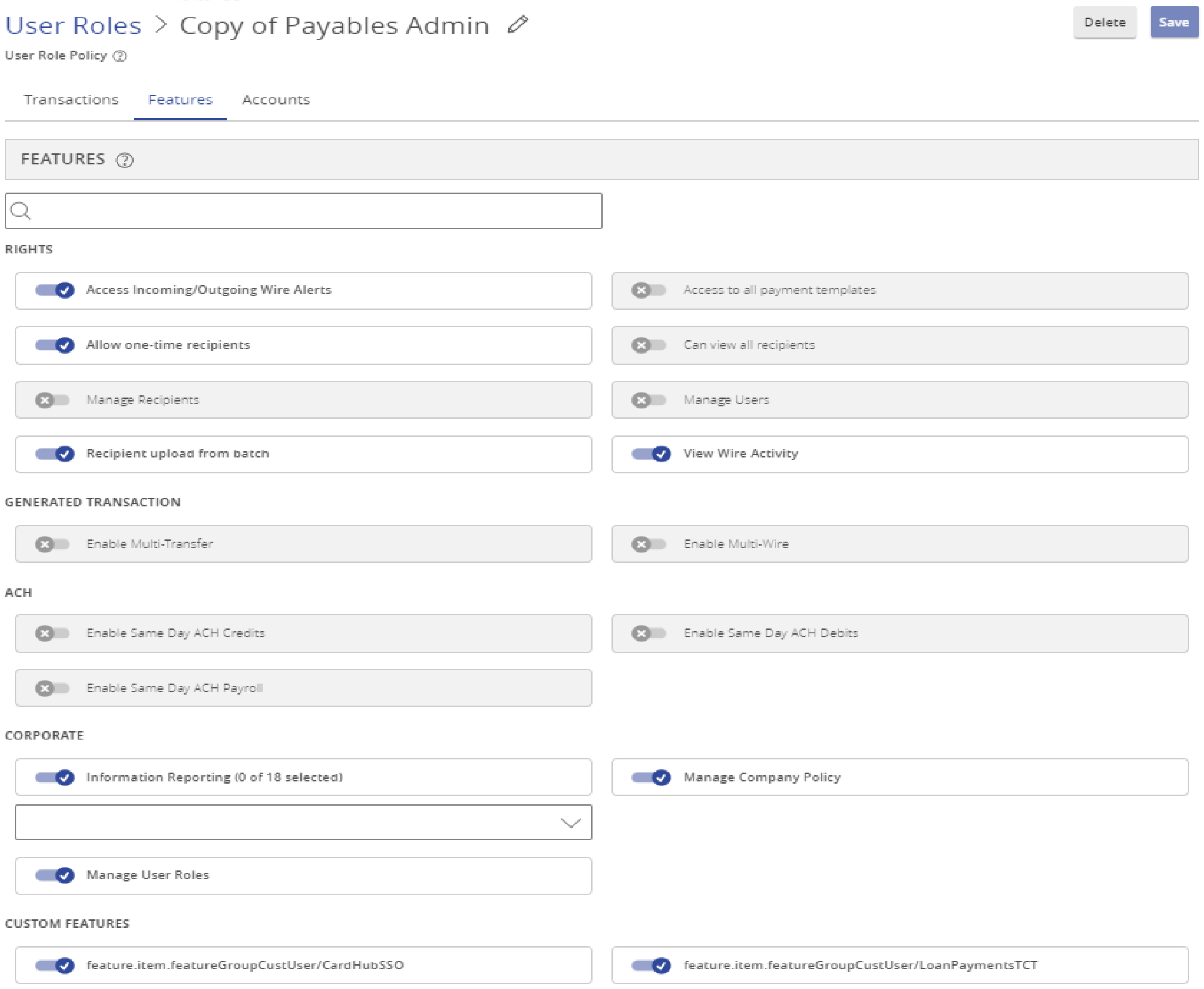


2. Select the edit icon in the desired User Role row.

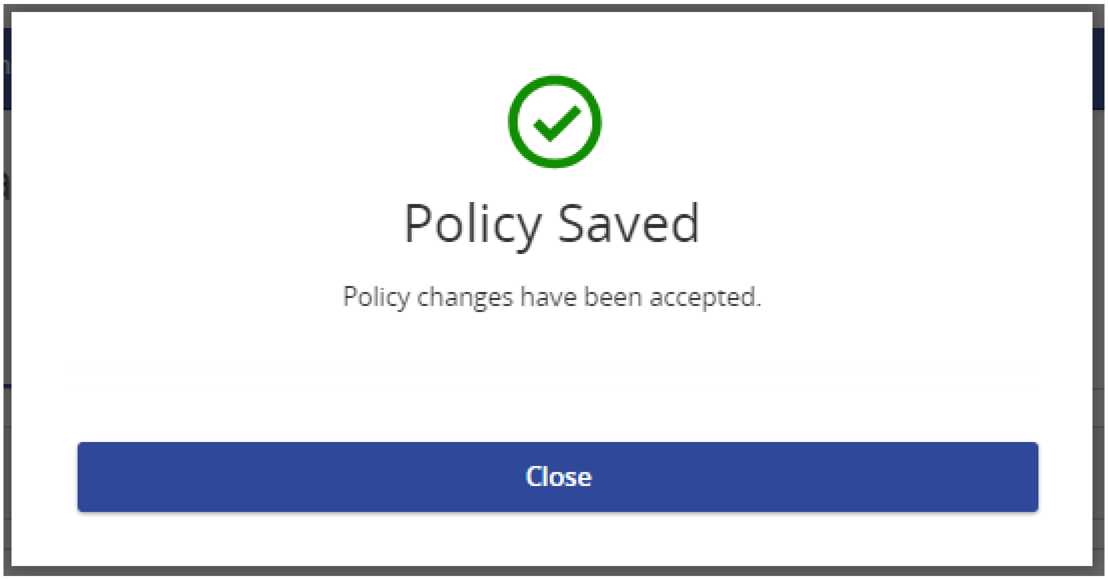


Name	Description	Users
Company Admin	Has access to all features, accounts, and enabled trx types with full amount (per Bank policy) for draft, approve, cancel trx rights. The Admin Role also has the maximum Role Approval Limits per Company Policy and the ability to View all User Roles trx activity.	9
Copy of Payables Admin	Has access to non-User or Company Policy related features, all accounts, and enabled payables GT trx types (ACH Single Payment, ACH Payments, ACH Payroll, Pass Thru, Domestic Wire Transfer, & Intl Wire Transfer) with full allowed amount (per Bank policy) for draft, approve, cancel trx rights. The Payables Admin Role also has the maximum Role Approval Limits per Company Policy and the ability to View all User Roles trx activity.	1
Full Company Non Admin	Has access to all features, accounts, and enabled trx types with full amount (per Bank policy) for draft, approve, cancel trx rights.	None
View Only	View Accounts, Stop Payments, Documents	2
View Only	View Only	None
Wire Only	View Accounts, Wire Only, Documents	1

3. Select the Features tab to see a list of features.



4. Select the desired Feature. The feature categories will vary depending on your configuration and may include:
   - Rights
   - Transactions
   - ACH
   - System Values
   -
5. Select Save. The Policy Saved page appears confirming the changes.



6. Select Close to return to the Accounts page. Another User may have to approve changes.

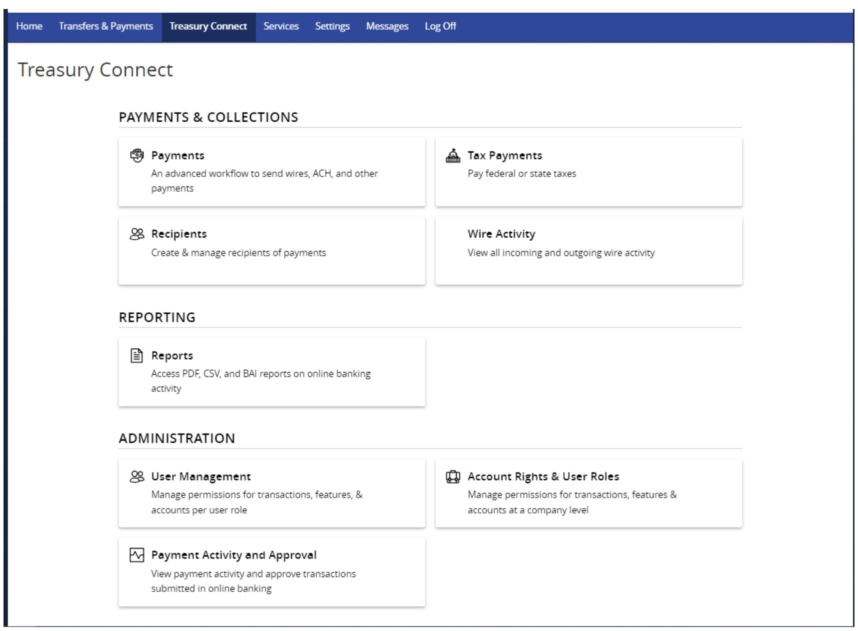
Deleting a User Role

When the User Role is deleted, the user will move into an unassigned role status and won't have access to accounts.

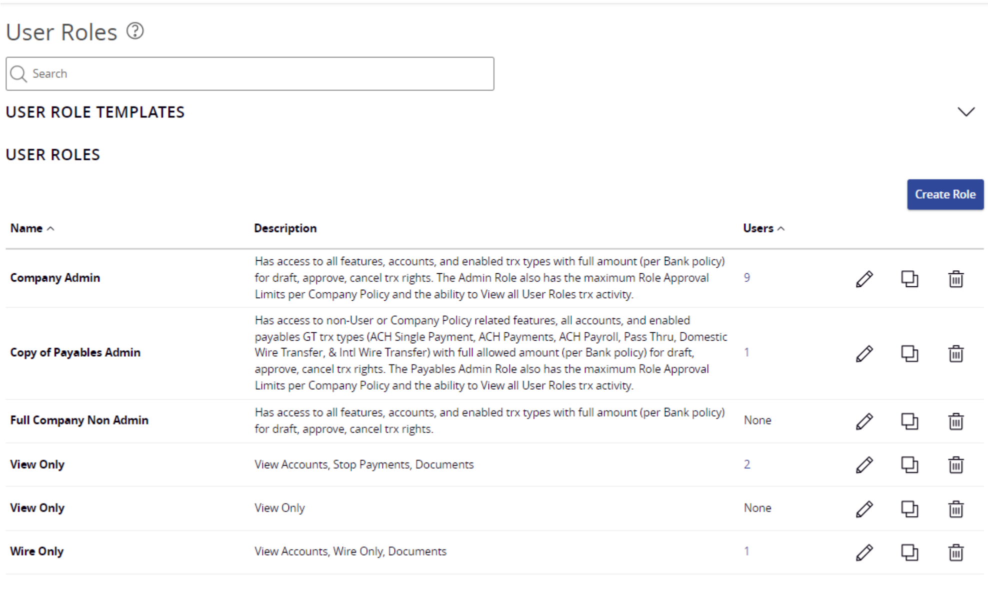
Caution: Deletion is permanent, so use caution before deleting a User Role.

To delete a User Role:

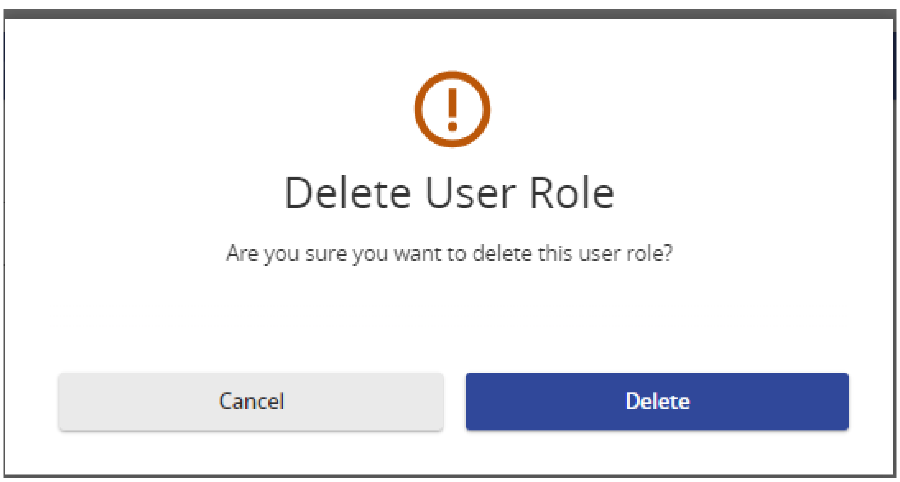
1. In the navigation menu, select Treasury Connect > Account Rights and User Roles.

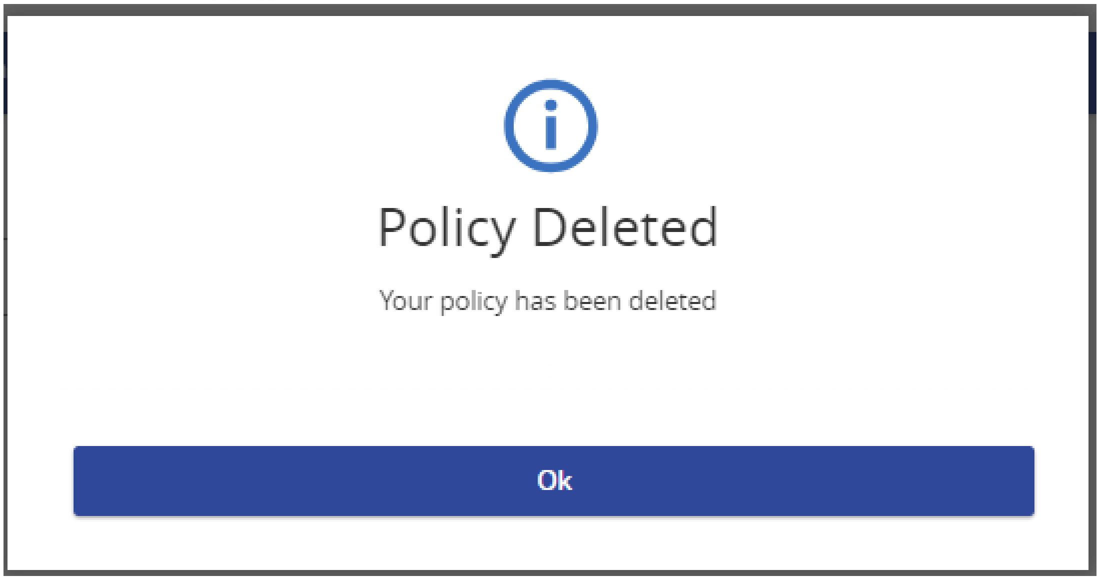


2. Select the delete icon.



3. Select Delete to confirm deletion.





4. Select Ok. The User Role page appears