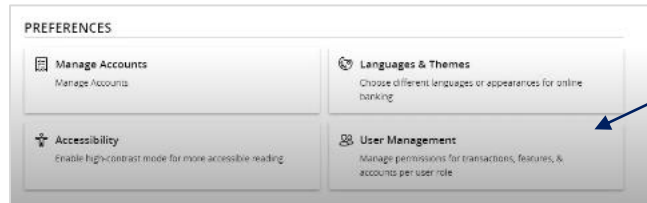
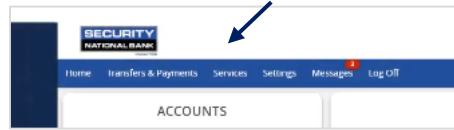


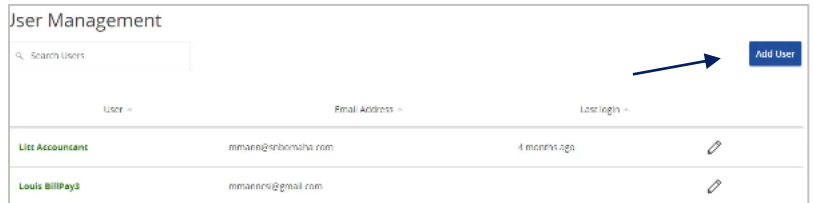


## Creating New Users

1. Select 'Settings' then the 'User Management' tile.



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.

**New User Details**

**PERSONAL DETAILS**

First Name  Last Name  Email Address

Phone Country  Phone

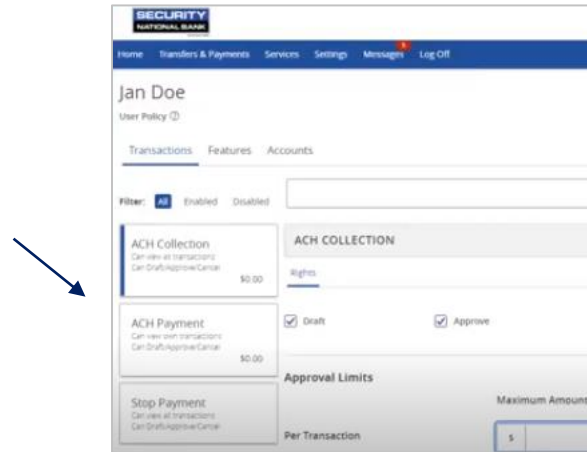
**LOGIN DETAILS**

Login ID  Password  Confirm Password

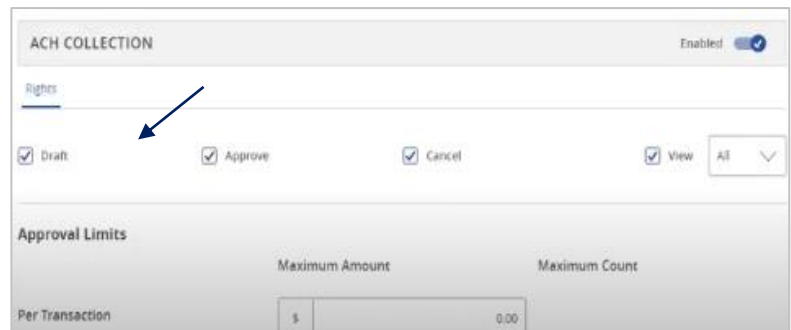
Questions? Please call our Customer Care Center toll-free at 855-614-4061.



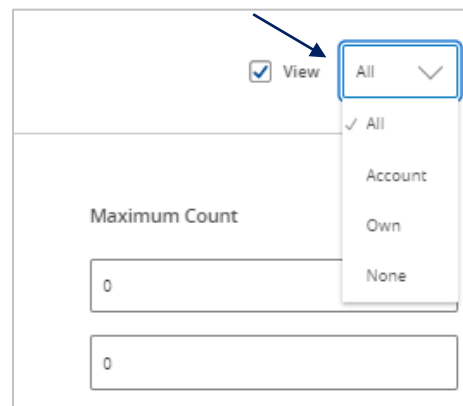
4. Click the 'Save New User Details' button on the bottom right-hand corner of the screen.
5. Click on each Transaction Type to configure the user's entitlements and limits.



6. On the 'Rights' tab, select the user's transaction rights by toggling the checkmarks on/off.



7. Click on the drop-down menu to adjust the view rights.
  - a. Can view transactions initiated by any online banking user within the company.
  - b. Can only view the user's own transactions.
  - c. Can view transactions to or from entitled accounts.
  - d. Cannot view any transactions.



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8. On the 'Approval Limits' tab, enter the user's transaction dollar and count limits.

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

	Maximum Count
Daily Per Account	0
Daily	0
Monthly	0

9. Click on the 'Features' tab.

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

Transactions **Features** Accounts

FEATURES

RIGHTS

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

STATEMENT IMAGE

MOBILE

- Mobile Capture

CUSTOM FEATURES

- SDK: Account Container
- SDK: Accounts
- SDK: AdvancedStatementViewer
- SDK: LoanPaymentsTCT

11. On the 'Accounts' tab, designate the user's account rights.

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

Jan Doe Save

User Policy

Transactions Features **Accounts**

ACCOUNTS

3 of 3 accounts shown

[Hide unassigned accounts](#)

Number	Name	View	Deposit	Withdraw
1884	Small Business	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4567	Small Business	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5562	Commercial Checking	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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