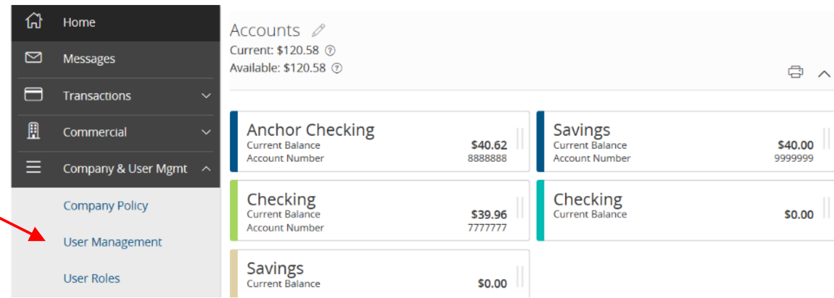
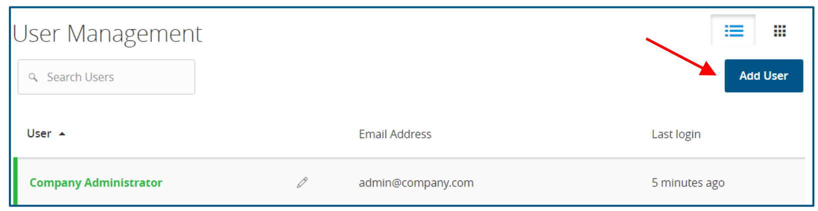
Creating New Users

1. Select ‘Commercial’ and then select ‘User Management’.



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

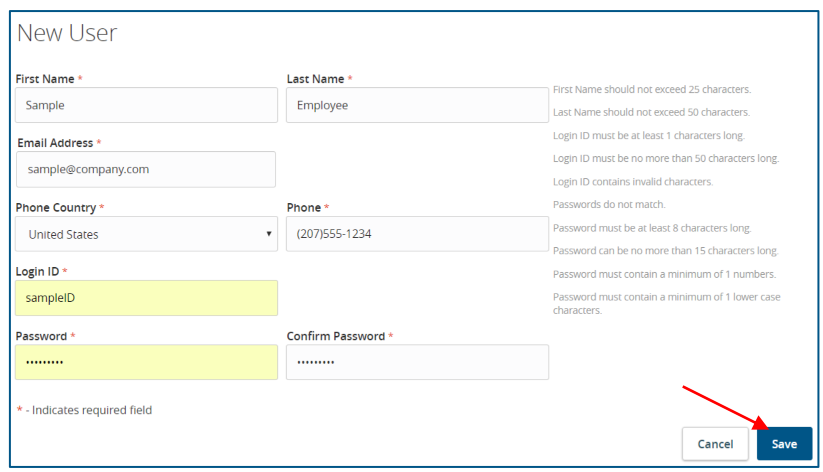


3. Enter the required fields for the new user.

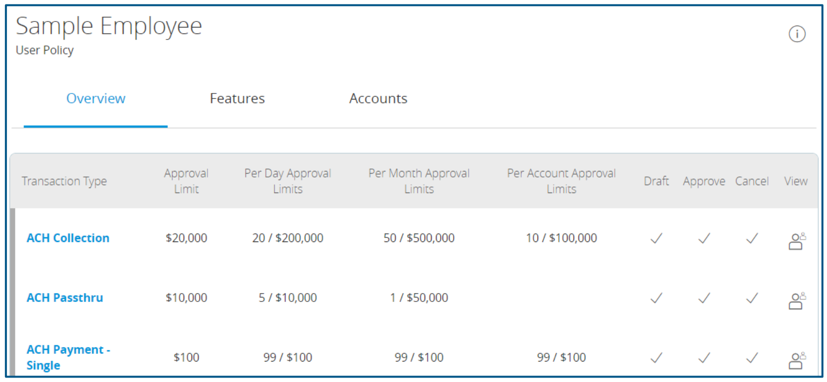
Note: If the chosen user ID is already in use it will not allow you to save.

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

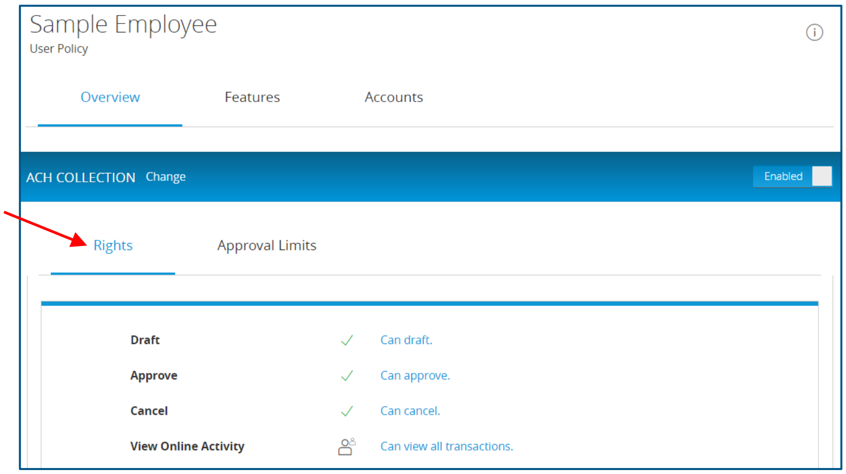
4. Click the ‘Save’ button on the bottom right hand corner of the screen.



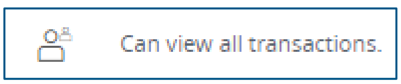
5. Click on each Transaction Type to configure the user's entitlements and limits.



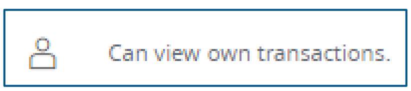
6. On the 'Rights' tab, select the user's transaction rights by toggling the checkmarks on/off.
7. Click on the icon to adjust the view rights.



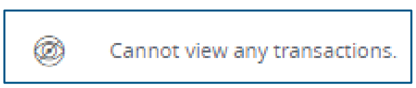
a. Can view transactions initiated by any online banking user within the company.



b. Can only view the user's own transactions.



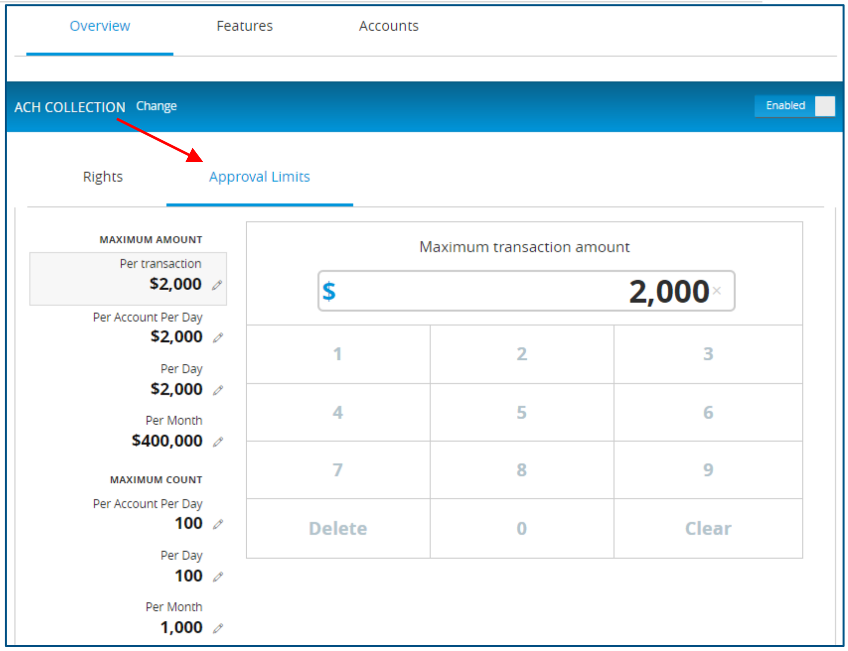
c. Cannot view any transactions.



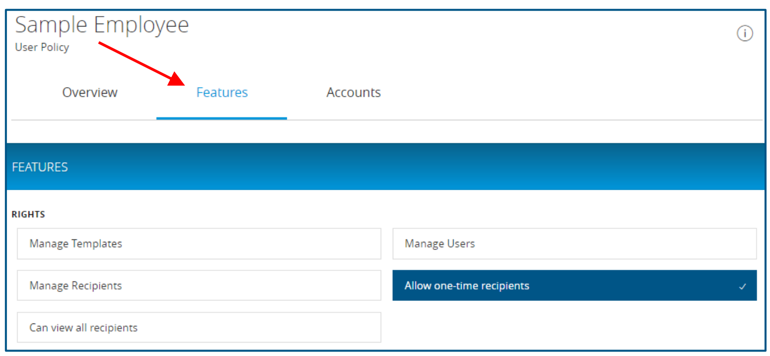
8. On the ‘Approval Limits tab, enter the user’s transaction dollar and count limits.

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

9. Click on the ‘Features’ tab.

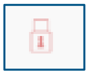


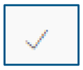
10. On the ‘Features’ tab, select the appropriate non-transactional features.



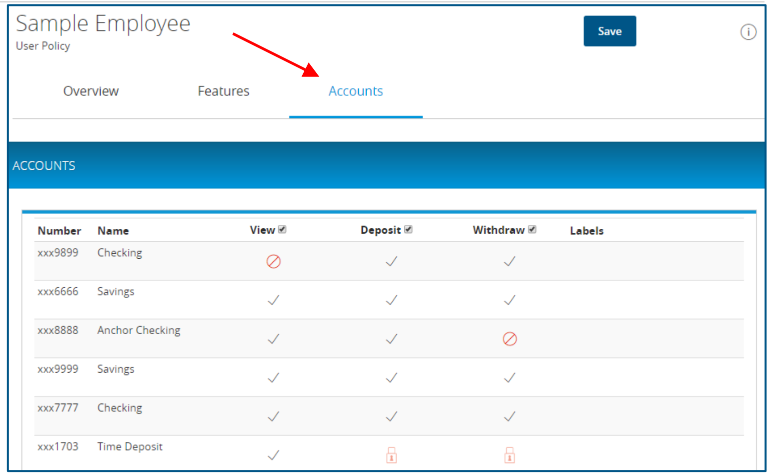
11. On the ‘Accounts’ tab, designate the user’s account rights.

 Access is disabled, but can be enabled.

 Access is disabled for the company & cannot be enabled.

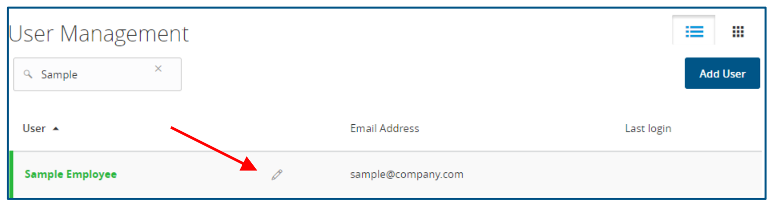
 Access is enabled.

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

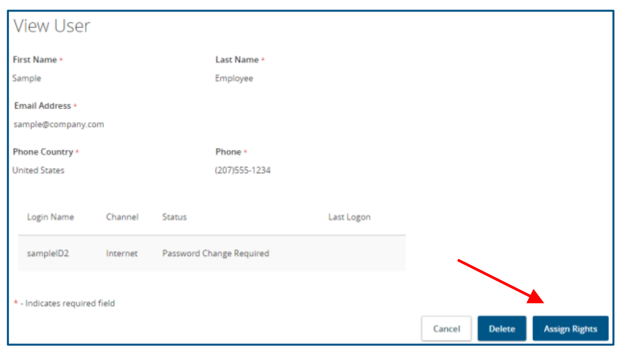


Maintaining Existing Users

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.



Questions? We can help!
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