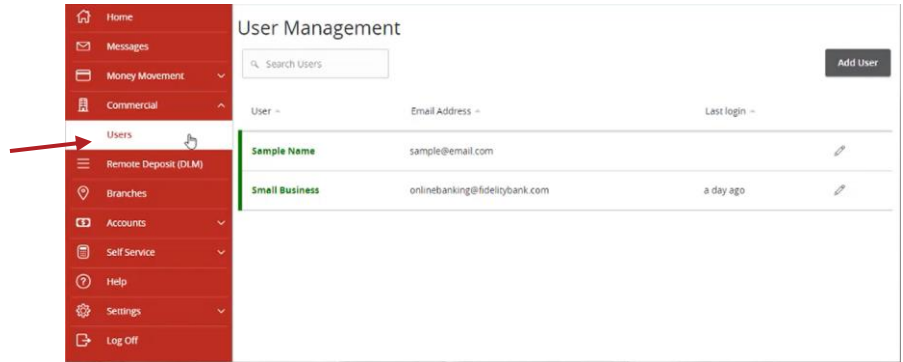


Creating New Users

1. Select the 'Commercial' 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' button on the bottom right hand corner of the screen.

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

Transaction Type	Approval Limit	Per Day Approval Limits	Per Month Approval Limits	Per Account Approval Limits	Draft	Approve	Cancel	View
Bill Payment								
Change Address		5	10	2	✓	✓	✓	Own
Check Reorder		1,000	1,000	1,000	✓	✓	✓	Own
Stop Payment		1,000	1,000	1,000	✓	✓	✓	Own
Transfer - Internal	\$50,000.00	1,000 / \$50,000.00	1,000 / \$50,000.00	1,000 / \$50,000.00	✓	✓	✓	Own

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.

TRANSFER - INTERNAL Change Enabled

Rights | Approval Limits

Draft	✓	Can draft.
Approve	✓	Can approve.
Cancel	✓	Can cancel.
View Online Activity		Can view own transactions

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.

Sample Name
User Policy ⓘ

Overview Features Accounts

TRANSFER - INTERNAL [Change](#)

Rights **Approval Limits**

Maximum Amount ⓘ

Per transaction
\$ 50,000.00

Per Account Per Day
\$ 50,000.00

Per Day
\$ 50,000.00

Per Month
\$ 50,000.00

Maximum Count ⓘ

Per Account Per Day
1,000

Per Day
1,000

Per Month
1,000

- 9. Click on the 'Features' tab.

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

Sample Name
User Policy ⓘ

Overview **Features** Accounts

FEATURES ⓘ

Search

RIGHTS

Access to all payment templates	Can view all recipients
Centrix DTS Transaction Disputes ✓	Manage Recipients
Manage Users	Statement Image

CUSTOM 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.

Sample Name
User Policy ⓘ

Overview Features **Accounts**

ACCOUNTS ⓘ

Hide unassigned accounts

Number	Name	View	Deposit	Withdraw
xxx2808	ZBA COMMERCIAL CHECKING	⊘	⊘	⊘
66666123	STATEMENT SAVINGS	🔒	🔒	🔒
xxx4721	CBL LOC /NON RE SECURED	⊘	⊘	🔒
60123037	FREE CHECKING	🔒	🔒	🔒
xxxxxxx	COMMERCIAL CHECKING			

Maintaining Existing Users

1. Click the pencil icon to edit the existing user.

User Management

Search Users

Add User

User	Email Address	Last login
Sample Name	sample@email.com	
Small Business	onlinebanking@fidelitybank.com	a day ago

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.

View User

First Name *
Sam

Last Name *
Pleuser

Email Address *
Sample.user@gmail.com

Phone Country *
United States

Phone *
(727)600-1234

Login Name	Channel	Status	Last Logon
Sampleuser1	Internet	Login Disabled	

* - Indicates required field

Cancel Delete **Assign Rights**