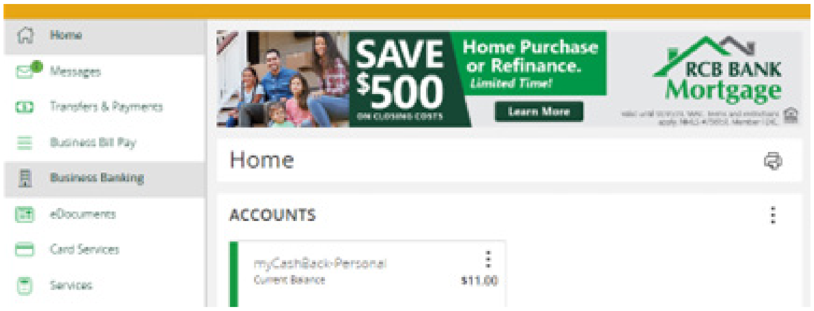
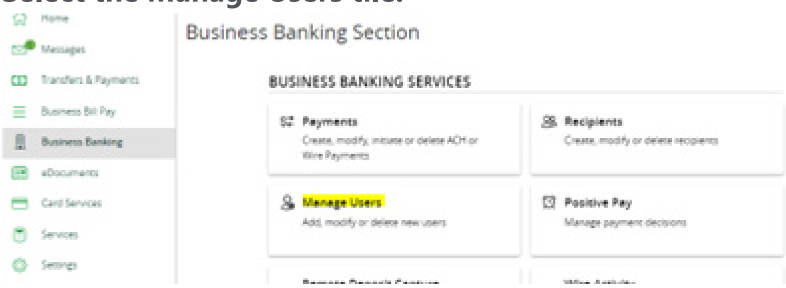
Adding a User

1 In the navigation menu, select Business Banking.

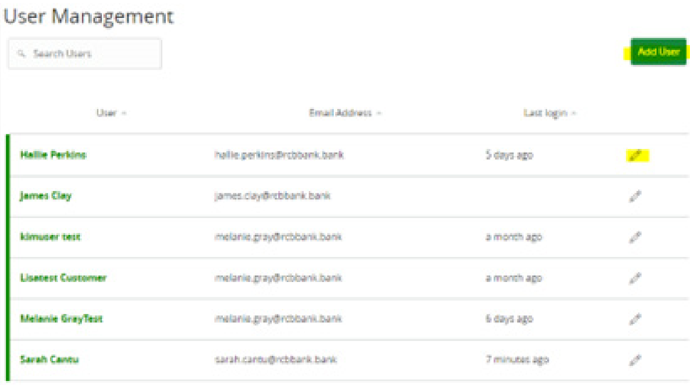


2 Select the Manage Users tile.

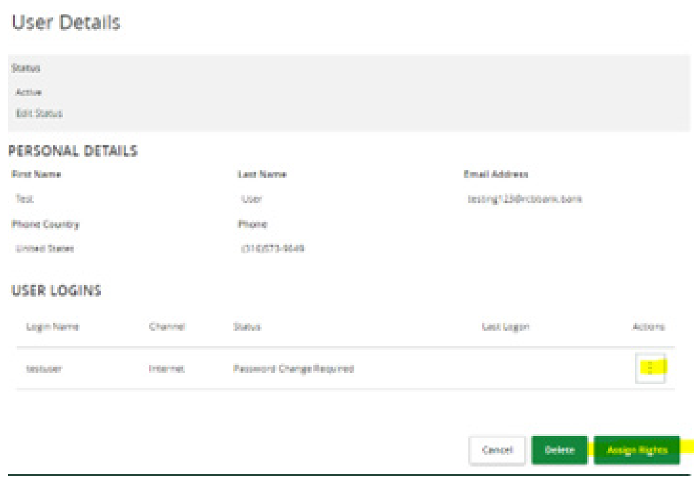


3 A list of current users will be displayed.

- To add a new user, click Add User. Fill in user's information, then click Save User Details. A SAC or Token will be required to add new users.



- To edit an existing user, click the pencil for that user. To update the user's permissions, click Assign Rights.

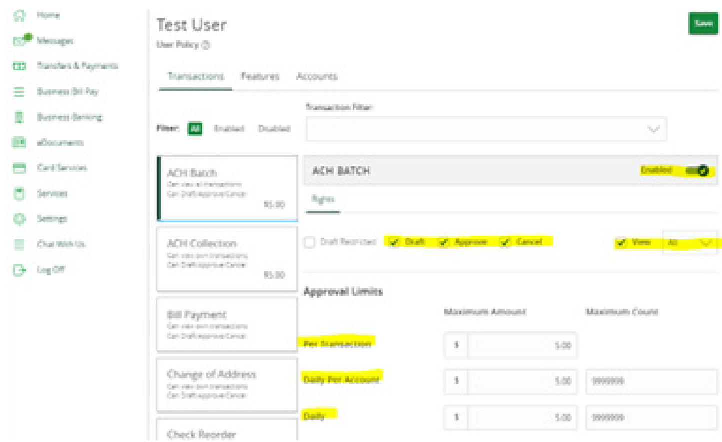


> *Additional steps on the next page.*

4

Click into each Transaction to enable permissions, modify rights, limits, and viewing access for each.

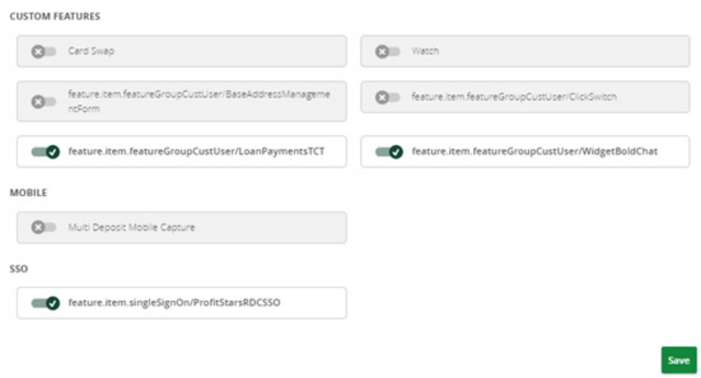
- Select Draft/Approve/Cancel as applicable
- If setting up on Dual Control, be sure to add alert to notify of drafted files
- Set View to All; this allows the user to view all transaction files
- Set Transaction/Daily/Monthly Limits
- Save
- Go through each function and assign as necessary



5

Click into Features to modify user's features.

- Enable Rights: access to all payment templates, view all recipients, manage recipients, manage users, and Positive Pay as needed
  - Note, manage users is to edit current users
- Save

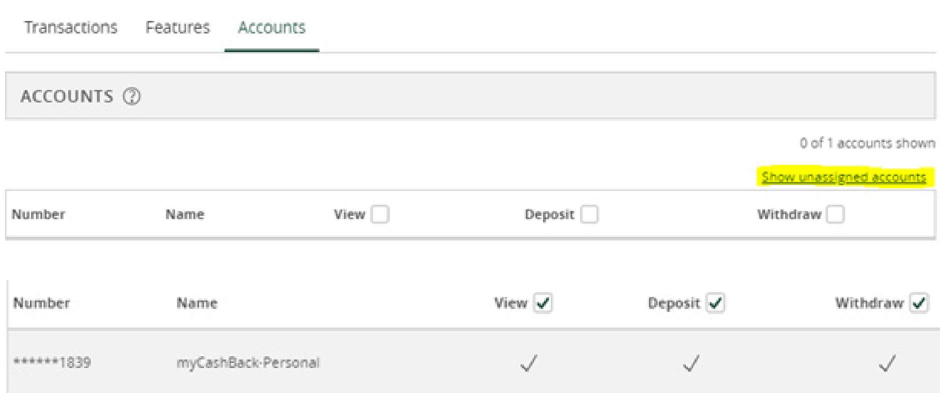


**See attached document for description of all features*

6

Click into Accounts to modify account access.

- Click Show Unassigned Accounts and enable View/Deposit/Withdraw as needed
- Save



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