

Business e-Banking User Entitlements

Admin Guide

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Adding Users and Services

To add new Business eBanking users and the services they will use, complete the following:

1. In the Administration tab, click Manage Users in the Company Administration section. The User Administration page will appear on screen:

Business <mark>eBankin</mark> ^{Welcome Reports} •	G Disclosures Heb Sign (Transfers and Payments ▼ Account Services ▼ Administration ▼
User administration User administration approval Account administration Approvals administration View invalid login report	User Administration Review the options listed below for available user administration tasks. To quickly entitle a new account for company users, go to Express Account Management. Create New User
View user setup report Express account management	To create a new user, click on the button below. You will have an opportunity to copy an existing user during the process. Create new user Manage Existing Users To manage a user's profile, roles, services & accounts, system access, or change limits, click on the appropriate user ID.

2. Click the Create new user button. The New User – Profile page will appear:

isiness eBanking				Disclosures Help S
Icome Reports Transfers and	d Payments 👻 Account Services 👻	Administration 👻		
Profile	Roles	Services & Accounts	Limits	Verification
New User - Profile				
Enter the new users information below	w, and click "Continue". To save this new	user as a draft to be completed at a later time,	click the link "Save as Draft".	
User Information				
User ID:				
Password:				
	(Passwords are not case sensitive, are 8 to 12	2 characters long and must contain at least 1 letter and 1	number.)	
Confirm password:				
First name:				
Last name:				
Primary e-mail address:				
Secondary e-mail address (optional):				
Additional Information (antional)				

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3. Complete the field as required.

Fields	Description
User ID	Enter the ID that the user will use to sign on Business eBanking
Password	Enter a starter password that follow the on screen instruction. (Passwords are
	not case sensitive, are 8 to 12 characters long and must contain at least 1
	letter and 1 number).
Confirm Password	Enter the same starter password again.
First Name	Enter the new user's first name.
Last Name	Enter the new user's last name
Primary e-mail	Enter the email address of the new user.
User Telephone Number	Enter the DIRECT telephone number of the new user. If no direct telephone
	number available, please contact Cash Management Services.

4. Click Continue. The New User – Roles page will appear on screen:

	ents · Account Services ·	Administration 👻		
Profile	Roles	Services & Accounts	Limits	Verification
lew User - Roles				
elect roles for this new user, and click "Cont	inue." To save this new user as a	draft to be completed at a later time, click the	link "Save as Draft."	
ew user: Tom Banker (TBANKER) Edit				
o save time in creating a new user, copy role	es, services, and accounts from a	n existing user. Select the appropriate option a	and link below. Roles, services, ar	nd accounts will be selected to ma
Copy Existing User (optional) o save time in creating a new user, copy role opied user, and can be edited as required. D not copy user. Copy user: Select user	es, services, and accounts from a	n existing user. Select the appropriate option a	and link below. Roles, services, ar	nd accounts will be selected to ma
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copy Existing User (optional) o save time in creating a new user, copy role opied user, and can be edited as required. D on ot copy user. Copy user: <u>Select user</u> Iser Roles (optional) Allow this user to setup templates. (This entities the user to template setup capabilit Allow this user to approve transactions. (This entities the user to tansamt capabilities for Grant this user to add, modify, copy and	is, services, and accounts from a ties for only those services and accour only those services to which the user d delete users, modify their roles, serv	n existing user. Select the appropriate option a ts to which the user has been entitled.) has been entitled.) ces and account access, rename accounts, and modify	and link below. Roles, services, ar	nd accounts will be selected to ma requests.)

- 5. Optional Check the boxes under the User Roles column that you want to assign to the new user.
- 6. Click Continue.
- 7. The New User Services & Accounts page will appear on screen.
- 8. Select the services you want to enable and accounts you want to entitle to the user.

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Busines	s eBankir	ng				Disclosures Help Sign Off
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	Drafile	Balar	Canúnas 8	Accounts	Limite	Martheore
	Etseller	CLUMO .	Jervices d	Accounts	LIMITS	WHITEBOOK
Nev	v User -	Services & Acco	unts			
Select Draft."	services and ac	counts for this new user and clic	k "Continue." To save th	his new user as a	draft to be completed at a la	ter time, click the link "Save as
New u	ser: Arthur Admi	in (ADMIN25) Edit				
Servi	ices & Acco	unts (optional)				
To ena	ble a service an	d assign accounts, click on the	appropriate link. To disa	ble all services ar	d accounts, click "Clear all."	

- 9. Click Continue.
- 10. The New User ACH Limits page will appear on screen.

me Reports v	Transfers and Payments V	Account Services v	Administration •		
Pre	ofile	Roles	Services & Accounts	Limits	Verification
lew User -	ACH Limits				
nter or make appropr	iate changes to ACH limits for th	his new user and click "co	ntinue". To save this new user as a draft	to be completed at a later time, clici	k the link "Save as draft "
				to be completed at a later time, ene	
ew user. Tom Banke	(IBANKER) EOI				
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- 11. Set the ACH Daily Maximum Limit, ACH Daily Maximum Service Limits, and ACH Accounts Limits.
- 12. Click Continue.
- 13. The New User Wire Limits page will appear:
- 14. Set the Wire Daily Maximum Limit (top left empty box), Wire Daily Maximum Service Limits (two empty boxes, mid right), and Wire Account Limits (bottom section).

ess eBanking				
Reports • Transfers and Pay	ments • Account Services •	Administration 👻		
Profile	Roles	Services & Accounts	Limits	Verification
ew User - Wire Limit	S			
er or make appropriate changes to Wire	limits for this new user, and click "	continue". To save this new user as a draft, to	be completed at a later time, click the lini	k "Save as draft."
w user: Tom Banker (TBANKER) Edit				
ire Daily Maximum Limit				
er the maximum daily amount allowed f	or the sum of all user's Wire transac	tions. The limits must be no greater than the	company limit set by the bank. View Com	pany Limits.
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s p,t	000,000.00			
ire Daily Maximum Service Lin	nits			
ter the maximum daily amount for each	of the user's Wire services. The limit	s must be no greater than the company limit s	set by the bank. View Company Limits.	
fire Service				User Daily Service Limit
ire Domestic One Time				\$ 1,000,000.00
ire USD Intl One Time				\$ 1,000,000.00
lire Account Limits				
ter limit amount for each of the user's W	ire accounts.			
ccount Number	No Limit	User Individual Transaction Limit	No Limit	User Daily Account Limit
166 - south account	V		V	
346 - corporate	V			
244 - checking 8	V		V	
518 - expense account	V			
910 - OPERATING ACCOUNT	V		2	
911 - CHECKING 2	V			

- 15. Click Continue.
- 16. The New User Verification page will appear on screen:
- 17. Review & finalized the information on this page before clicking submit.
- 18. Click Submit.

me Reports + Trans	fers and Payments · Account Servi	ices • Administration •		
Profile	Dolas	Condeas & Accounts	l imite	Verification
FIGHE	55550	JANNERS & ACCOUNTS	Linits	venicabor
New User - Veri	fication			
he new user you have entered	d is now complete. Review summary info	amation below and click "Submit." To save this new	wuser as a draft to be completed at :	a later time, click the link "Save as Draft."
o make changes, click on the	e section in the progress bar at the top o	f the page, or the appropriate link below		
Profile				Change Prof
lame:	Tom Banker			
Jserid:	TBANKER			
nimary e-mail address:	tom banker@abcbank.com			
felaphone number:	414-952-2222			
Roles				Change Rol
Enabled roles:	Administration Setup Approval			
Services & Accounts:				Change Senices & Account
Enabled services:	8 of 37 available			
Limits:				Change Lim
imits completed:	ACH Wire			
Submit Same as Deat				
CALL AS LINE				

Note: For companies that do not require multiple approvals for Administration, clicking Submit creates and activates the user. For companies that require multiple approvals for Administration, clicking Submit submits the user profile for approval by other Administrators in the company.

Copying Users

To copy a user's access and create a new user, complete the following:

1. From the User Admin page, click the Create new user button. The New User – Profile page appears:

Profile		Roles	Services & Account	•	Limits	Verification	
New User - Pro	ofile						
inter the new users inform:	ation below, and click "Co	ntinue". To save this new	w user as a draft to be completed a	t a later time, click the lin	k "Save as Draft".		
Jser Information							
Jser ID:							
Password:							
	(Passwords are	not case sensitive, are 8 to	12 characters long and must contain at let	ist 1 letter and 1 number.)			
Confirm password:							
irst name:							
ast name:							
Finary e-mail address:	loctional):						
Additional information fontion	weally						
Controllar Information (open	and the second sec						
Jser Telephone Nun	iber						
he telephone number is us	ed to contact or notify the	e user for security reason	ns. An extension is required when i	eeded to reach the user	within an office phone syste	em.	
Label	Country/Region		Area/City Code & Number	Extension			
Work •	UNITED STATES						
idd additional telephone or	mber						
and the training strengthenes in							

- 2. Complete all the fields on this page.
- 3. Click Continue. The New User Roles page appears.

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ome	Reports 🔻	Transfers and Payments V	Account Services 🔻	Administration V		
	Pr	ofile	Roles	Services & Accounts	Limits	Verification
Nev	v User -	Roles				
Select	roles for this ne	w user, and click "Continue." To	save this new user as a	draft to be completed at a later time, clic	ck the link "Save as Draft."	
New us	ser: Tom Banke	r (TBANKER) Edit				
	- Foldeting 11	and factor and				
Copy	existing o	ser (optional)				
To save	e time in creatin	ng a new user, copy roles, servic	es, and accounts from an	existing user. Select the appropriate op	tion and link below. Roles, services, an	ind accounts will be selected to match the
To save	e time in creatin luser, and can l Do not copy use	ng a new user, copy roles, servic be edited as required. rr.	es, and accounts from an	existing user. Select the appropriate op	tion and link below. Roles, services, and	nd accounts will be selected to match the
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- 4. Under the Copy Existing User section, click the remote button next to Copy user.
- 5. Click the link Select User. A pop up window will appear:

e s	elected to match the u	user selected, and can l	be edited as required	I.To return to the new user	roles
age	эѕ, сиск то ног сору	user .			
	User ID	First Name	Last Name	Additional Informat	ion
0	ADMIN	Admin	Admin		*
0	ADMIN104	KEN	STUDENT	BACK UP ADMIN	
0	TOMUSER	Tom	User		
(III			P.

- 6. Select the existing user that will be copied.
- 7. Click the Copy user button. The window will close. The User Profile page will appear with the selected user to be copied:

sine	ss eBanl	king				Disclosures Help E
come	Reports •	Transfers and Payments	Account Services	Administration 💌		
		Profile	Roles	Services & Accounts	Limits	Verification
Nev	w User	- Roles				
Select	roles for this	new user, and click "Continue.	" To save this new user as a	a draft to be completed at a later time,	click the link "Save as Draft."	
New u	ser: Tom Ban	ker (TBANKER)				
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	Copy user: T	om User Change user				
User	Roles (or	otional)				
_						
	Allow this use (This entities the	er to setup templates. Euser to template setup capabilities fo	r enty those services and account	nts to which the user has been entitled.)		
81	Allow this use	r to approve transactions.	hose services to which the user	has been entitled 1		
10	Grant this use	er administration privileges.	The set the state of the set	nas been ernoes.)		
1	This will allow t	he user to add, modify, copy and dele	te users, modify their roles, serv	ices and account access, rename accounts,	and modify the number of approvers required for	requests.)
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Cor	tinue	ave as Draft				
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		in the second seco				

- 8. Click Continue.
- 9. The New User- Service & Accounts page will appear.
- 10. Add, enable, and modify the services and accounts on this page.
- 11. Click Continue.
- 12. The New User ACH Limits page will appear.
- 13. Set the ACH Daily Maximum Limit, ACH Daily Maximum Service Limits, and ACH Account Limits.
- 14. Click Continue.
- 15. The New User Wire Limits page will appear.
- 16. Set the Wire Daily Maximum Limit, Wire Daily Maximum Service Limits, and ACH Account Limits.
- 17. Click Continue.
- 18. The New User Verification page will appear.
- 19. Review the information on this page.
- 20. Click Submit. The New User Confirmation page will appear.

Note: For companies that do not require multiple approvals for Administration, clicking Submit creates and activates the user. For companies that require multiple approvals for Administration, clicking Submit submits the user profile for approval by other Administrators in the company.

Deleting Users

To delete an existing user, complete the following:

1. From the User Administration page, click the User ID of the user you wish to modify. The User Profile page will appear.

Payments Account Ac	Senices Administration appropriate edit link. To delete this user, click "Delete user." To modi orm to User Administration. Tom User TOMUSER Active	fy the user's system access, click "Edit User Edit User Information • Delete user
er Profile t the user's profile, click the ation." w a different user profile, retur- r Information be: r status tect Information pays e-mail address	appropriate edit link. To delete this user, click "Delete user." To modi im to <u>User Administration</u> Tom User TOMUSER Active	fly the user's system access, click "Edit User Edit User Information • Delete user
any strian autoess.	tom user@bank.com	Edit Centact Information
ondary e-mail address: phone number S	No secondary e-mail address on file Work: +1 (414) 962-1551	Eds Roles
Roles Administration Setup Approval		
ices & Accounts		Edit Services & Accounts
Service Account Reports ACH File Upload ACH Positive Pay Wire USD Intl One Time Wire USD Intl Template Bas	ed	Service enabled, accounts not applicable Service enabled, accounts not applicable Service enabled, accounts entitled Service enabled, accounts entitled. Service enabled, accounts entitled.
ts		
Limits ACH Edit Wire Edit		
	Idministration Setup Isperoval Service Account Reports Account Reports ACH File Upload ACH Positive Pay Write USD Intil One Time Write USD Intil Template Base S Imite Ispect Edit	withinistration Setup upproval

2. Click the Delete user link. The Delete User page appears:

Busines	s eBankii	ng							Disclosure	: Help	Sigr
Velcome	Reports -	Transfers and Payments Account	Services 💌	Administration •							
User adm approval Account a Approvals View inva View user	ninistration ninistration administration administration administration add login report r setup report	User Administrat You have requested to delete the To delete this user, click "Delete User Information Name: User ID: User status: Contact Information Primary e-mail address: Secondary e-mail address:	tion - De following user. e user", or return Tom Ba TBANKI Active tom.ban	Iete User Once deleted, the us to <u>User Profile</u> . nker ER	er cannet be re	covered. Scher	duled requests set up	b by this user will b	e deletad.		
		Secondary e-mail address: Telephone number: Roles	No seco Work:	ndary e-mail address +1 (414) 962-2222	on file						
		Roles									
		Administration									
		Setup									
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		Services & Accounts									
		Service									
		Account Reports						Service enab	led, accounts not	applicable	
		ACH File Upload						Service enab	led, accounts not	applicable	
		ACH Positive Pay						Service	e enabled, accoun	ts entitled	
		Deposit Account Reporting)					Service enab	led, accounts not	applicable	
		Positive Pay						Service	e enabled, accoun	ts entitled	
		Reverse Positive Pay						Service	e enabled, accoun	ts entitled	
		Wire Domestic One Time						Servic	e enabled, accoun	ts entitled	
		Wire USD Intl One Time						Service	e enabled, accoun	ts entitled	
		Delete user Do not de	elete								
How Do	Term	FAOs									

3. Click Delete User. The User Administration page appears, the deleted user is no longer listed.

Express Account Management

Company users with administrator roles also have access to the Express Account Management page. This page allows company users to quickly entitle a new account for multiple company users without having to go through the entire account for multiple company users without having to go through the entire account setup process.

To get to the Express Account Management page:

1. In the Administration tab, click Express Account Management in the Company Administration section. The Express Account Management page will appear:

Welcome Reports 🔻	Transfers and Payments Account Services Administration
User administration User administration approval Account administration Approvals administration View invalid locin report	Express Account Management Select the user and account to manage and click "Go". The available services for the account will be displayed below. Select the services that the selected account will be assigned to, and click "Save changes". Saved changes will override current entitlements for the selected account and services. To review changes, go to <u>User Administration</u>
View user satup report • Express account management	User Account: CHECKING 3-Checking-*2912 - <u>Search</u> Go
the Part Trans	

2. Find a user by clicking the User drop-down list and clicking on the name.

Note: If the company has more than 20 accounts, a Search link appears next to the Account drop-down list.

- 3. Click Go.
- 4. The Express Account Management page will appear, showing the service entitled for the user.

elcome Reports 🔻 Tra	insfers and Pay	yments 👻 Account Services 👻	Administration 👻		
Manage users Approve user changes Manage account information Manage approval settings Irvalid locin report	Expression Select the Select the current en	ess Account Mana e user and account to manage and c a services that the selected account titlements for the selected account	gement fick "Go". The available ser will be assigned to, and cli and services. To review cha	vices for the account will be displayed b ick "Save changes". Saved changes will inges, go to <u>User Administration</u> .	velow. override
User setup report					
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management Manage SEC codes - ACH Star	User:	KEN STUDENT-ADMIN104	 Account: 	CHECKING 3-Checking-*2912	• Search
nu riica	Servic	es for KEN STUDENT (ADM	/IN104) - Checking -	*2912	
		Service	Entitle Account	Allow Transmit	
	-	5614156			
	1	CCD Collection	V		
	2	CCD Payment	V		
	v	Federal Tax			
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	V	Information Reporting	×.		
	2	Internal Transfer	V		
	1	Multiple Account Transfer	1		
		Partial Account Recon			
		Positive Pay			
		Positive Pay Exception Maintenance			
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		PPD Collection	V		
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	V	State Tax			
		Stop Payment	V		
		Wire Domestic One Time	1		
	V	Wire Domestic Template Based	V		
		Wire FX Intl One Time			
		Wire FX Intl Template Based			
		Wire USD Intl One Time			
		Wire USD Intl Template Based			
	Save	changes Do not save cha	anges		

Note: The services that are displayed will depend on the services that are enabled for the account by the bank. If the service does not have the Transmit functionality, the check box in that column will

not be shown. If the service is not enabled, the entitlement check boxes are disabled. If the user does not have the Approval role, the Allow Transmit column is not shown.

5. Once changes have been made, click Save Changes. A confirmation message will appear on the top of the page.

Note: If multiple approvals are required for Administration, modified user profiles will be submitted to the User Administration Approval queue.