

# Online User Management

## Creating Online Users

1. Select the 'Users' option under the 'Commercial Functions' menu.
2. Click the 'Add User' button on the right side of the screen.

The screenshot shows the 'User Management' interface. On the left is a navigation menu with 'Commercial Functions' expanded and 'Users' selected. The main content area has a search bar, a 'Sort by' dropdown, and a grid of user cards. Each card shows the user's name, email, and last login time. An 'Add User' button is highlighted in a red box in the top right corner.

3. Enter the required fields for the new user.
4. Click the 'Save' button on the bottom right hand corner of the screen.

## New User

<b>First Name *</b>	<b>Last Name *</b>	<p>Login ID must be at least 3 characters long. Login ID must be no more than 19 characters long. Login ID contains invalid characters. Passwords do not match. Password must be at least 8 characters long. Password can be no more than 15 characters long. Password must contain a minimum of 1 numbers. Password must contain a minimum of 1 lower case characters.</p>
<input type="text" value="Tester"/>	<input type="text" value="McTest"/>	
<b>Email Address *</b>		
<input type="text" value="testermctest@test.com"/>		
<b>Phone Country *</b>	<b>Phone *</b>	
<input type="text" value="United States"/>	<input type="text" value="(555)555-5555"/>	
<b>Login ID *</b>		
<input type="text" value="testermctest"/>		
<b>Password *</b>	<b>Confirm Password *</b>	
<input type="password" value="....."/>	<input type="password" value="....."/>	

\* - Indicates required field

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

Tester McTest  
User Policy (i)

**Overview**      Features      Accounts

Transaction Type	Approval Limit	Per Day Approval Limits	Per Month Approval Limits	Per Account Approval Limits	Draft	Approve	Cancel	View
<b>ACH Collection</b>	\$99	30 / \$99	30 / \$99	30 / \$99	✓	✓	✓	
<b>ACH Passthru</b>	\$99	30 / \$99	30 / \$99		✓	✓	✓	
<b>ACH Payment - Single</b>	\$99	30 / \$99	30 / \$99	30 / \$99	✓	✓	✓	
<b>ACH Payments</b>	\$99	30 / \$99	300 / \$99	30 / \$99	✓	✓	✓	
<b>ACH Receipt - Single</b>	\$99	30 / \$99	30 / \$99	30 / \$99	✓	✓	✓	
<b>Bill Payment</b>								
<b>Change Address</b>		30	30	30	✓	✓	✓	
<b>Check Reorder</b>		30	30	30	✓	✓	✓	
<b>EFTPS</b>	\$99	30 / \$99	30 / \$99	30 / \$99	✓	✓	✓	

6. Select the user's transaction rights.

Tester McTest  
User Policy



Overview

Features

Accounts

ACH COLLECTION [Change](#)

Enabled

Rights

Approval Limits



<b>Draft</b>	✓	Can draft.
<b>Approve</b>	✓	Can approve.
<b>Cancel</b>	✓	Can cancel.
<b>View Online Activity</b>		Can view own transactions.

7. Enter the user's transaction dollar and count limits.

Tester McTest  
User Policy



Overview

Features

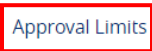
Accounts

ACH COLLECTION [Change](#)

Enabled

Rights

Approval Limits



<b>MAXIMUM AMOUNT</b>	Maximum transaction amount		
Per transaction	<input type="text" value="99"/>		
Per Account Per Day	1	2	3
Per Day	4	5	6
Per Month	7	8	9
<b>MAXIMUM COUNT</b>	Delete	0	Clear
Per Account Per Day			
Per Day			
Per Month			

8. Select the appropriate non-transactional features.

Tester McTest  
User Policy (i)

Overview **Features** Accounts

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**FEATURES**

**RIGHTS**

Manage Templates	Manage Users
Manage Recipients	Allow one-time recipients ✓
Can view all recipients	Enable Recipient Upload ✓
Enable Wire Upload ✓	View Wire Activity ✓
Access Incoming/Outgoing Wire Alerts ✓	Enable Recipient Upload from Batch ✓
Enable Wire Upload from Batch ✓	

**GENERATED TRANSACTION**

Enable Multi-Transfer ✓	Enable Multi-Wire ✓
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**TRANSACTIONS**

Allow ACH Company Entry Description Entry ✓
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**CUSTOM FEATURES**

feature.item.FeatureGroupCustUser/BaiFileExport ✓
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9. Designate the user's account rights.

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

Save



Overview

Features

Accounts

ACCOUNTS

Hide unassigned accounts

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>	Labels
xxx3456	External Checking	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
xxx3456	External Checking	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
xxx3456	External Checking	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2001800064	Business Value Checking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
42867	Business Value Checking	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
42864	Business Analysis Checking	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
42865	Business Value Checking	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
5003413557	Commercial Non-Real Estate Loan	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
12345	United Savings	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	