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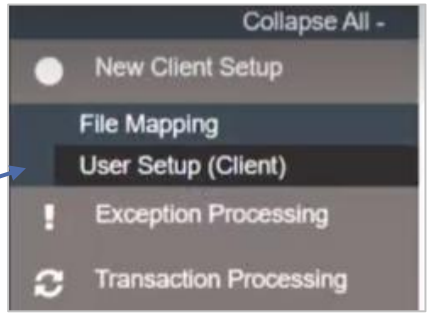
The User Setup page is used by the company administrator to manage users.

1. Under the New Client Setup menu, select 'User Setup (Client)'.



2. Click the 'Add New' button to set up a new user.

3. On the 'Contact Information' tab, complete all required fields on the screen which are designated with an asterisk.

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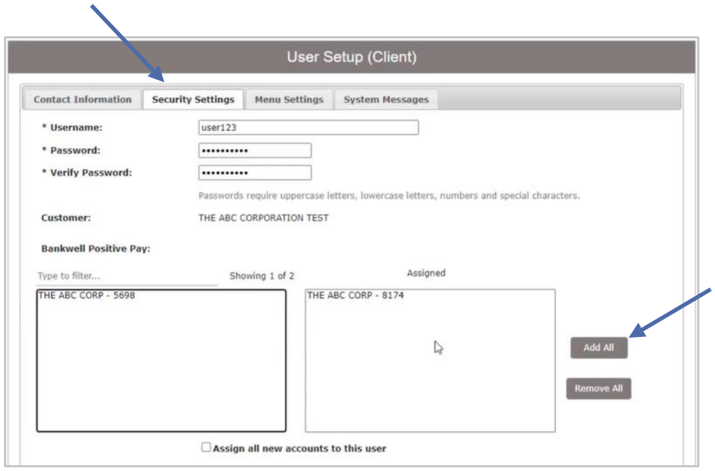
4. Click on the ‘Security Settings’ tab.

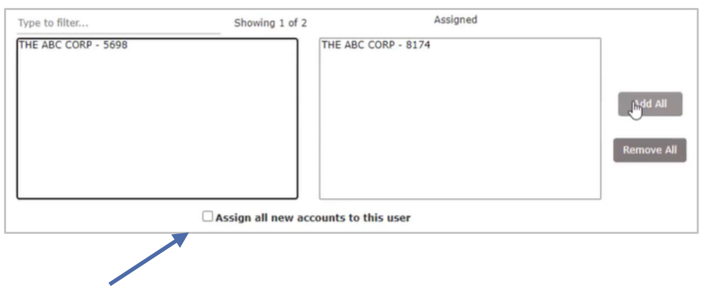
5. Enter the user’s desired Username and default password.

6. Enter the password a second time for verification. The user will be requested to change their password upon initial login.

7. Select the accounts in the box on the left side of the screen the user should have access to. If the user should have access to all accounts, click the ‘Add All’ button.



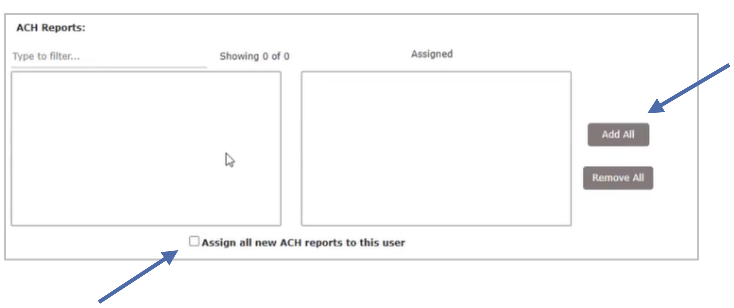
8. Click the ‘Assign all new accounts to this user’ option if the user should be automatically granted access to all new accounts opened by the company.



9. The ACH Reports section lists all available ACH Reporting Files.

10. Select the reports the user should have access to. Click the ‘Add All’ button, to add all reports.

11. Click the ‘Assign all new ACH reports to this user’ option if the user should be automatically granted access to all new ACH Reports created by the company.



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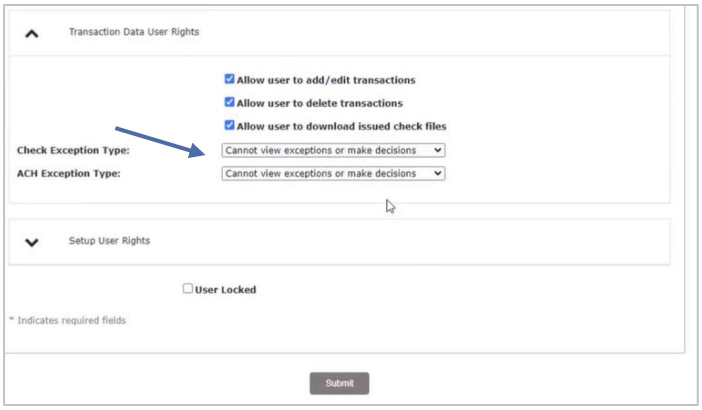
12. Click on 'Transaction Data User Rights' to expand the listing of rights available to assign to the user. Select all that apply.

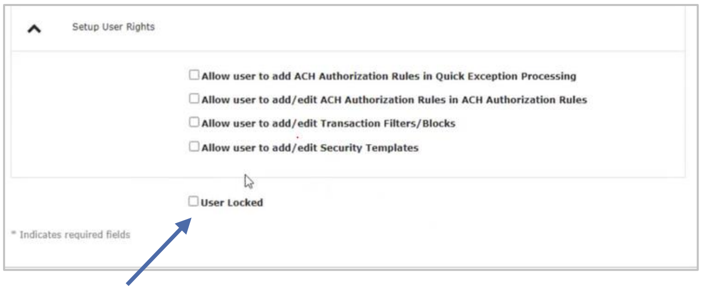
13. 'Check Exception Type' specifies the user's permissions for check exceptions. Select the desired view option in the drop-down menu.

14. Repeat this action for the ACH Exception Type drop down.



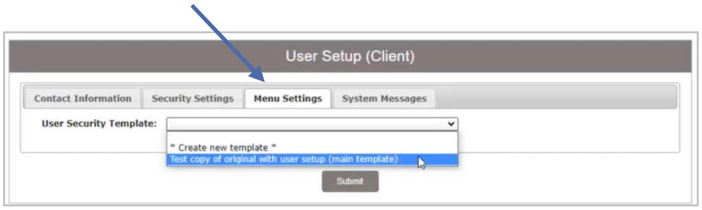
15. Click on 'Setup User Rights' to specify what rights should be available to the user.

16. Click 'User Locked' to lock the user record if the user should not be allowed to log into the system.



17. Click on the 'Menu Settings' menu.

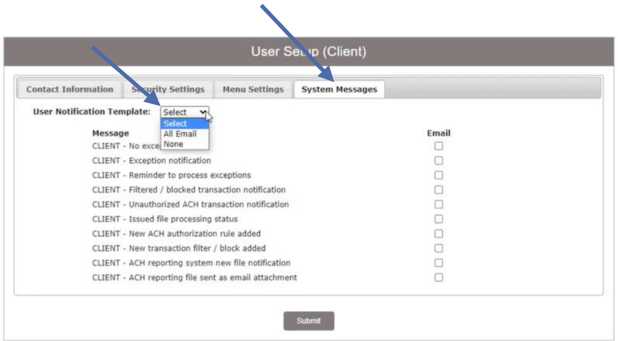
18. Select the user security template the user should have access to.



19. Click on the 'System Messages' menu to designate which notifications the user should receive.

20. Select an option from the drop-down menu beside 'User Notification Template' to quickly select all text or email notification options.

21. Click 'Submit' to complete the user setup process.



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22. To search for an existing user, select the desired user status from the drop-down menu then click the Search button.
23. Click the 'Edit' button to edit an existing user, or 'Copy' to copy an existing user.