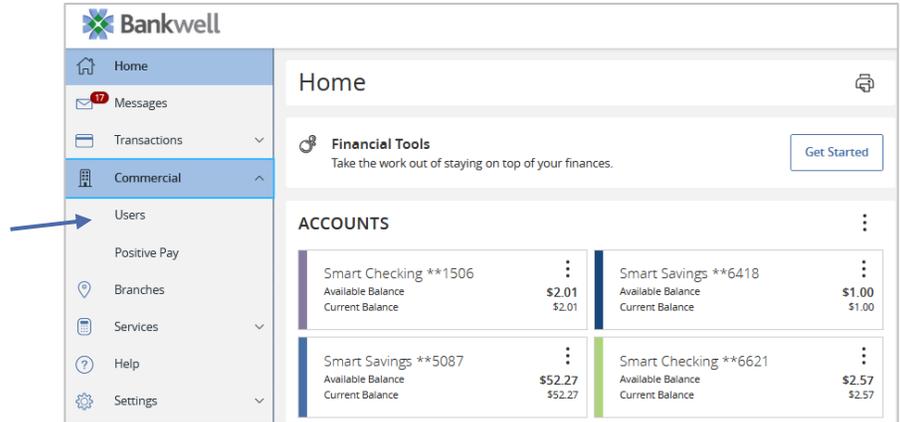


Creating New Users

1. Select the 'Commercial' menu and then select 'Users'



2. Click the 'Add User' button on the right side of the screen.



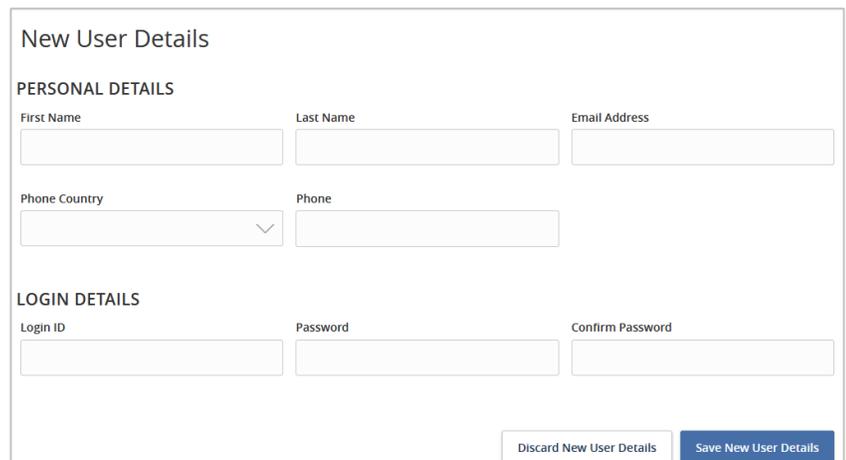
3. Enter the required fields for the new user.

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 New User Details' button on the bottom right-hand corner of the screen.



New User Details

PERSONAL DETAILS

First Name Last Name Email Address

Phone Country Phone

LOGIN DETAILS

Login ID Password Confirm Password

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

Sample User
User Policy ⓘ

Overview Features Accounts

Transaction Type	Approval Limit	Per Day Approval Limits	Per Month Approval Limits	Per Account Approval Limits	Draft	Approve	Cancel	View
Bill Payment								
Check Reorder		10	10	10	✓	✓	✓	Own
Stop Payment		50	100	25	✓	✓	✓	Own
Transfer - External	\$5,000.00	10 / \$5,000.00	20 / \$10,000.00	10 / \$5,000.00	✓	✓	✓	Own
Transfer - Internal	\$9,999,999.00	50 / \$9,999,999.00	100 / \$9,999,999.00	25 / \$9,999,999.00	✓	✓	✓	Own

- On the 'Rights' tab, select the user's transaction rights by toggling the checkmarks on/off.

- Click on the drop-down menu to adjust the view rights.

- Can view transactions initiated by any online banking user within the company.
- Can only view the user's own transactions.
- Can view transactions to or from entitled accounts.
- Cannot view any transactions.

Sample User
User Policy ⓘ

Overview Features Accounts

TRANSFER - INTERNAL [Change](#) Enabled

Rights Approval Limits

Draft	✓	Can draft.
Approve	✓	Can approve.
Cancel	✓	Can cancel.
View Online Activity	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Can view own transactions</p> <p>Can view all transactions</p> <p>Can view own transactions</p> <p>Can view transactions to or from entitled accounts</p> <p>Cannot view any transactions</p> </div>	

- On the 'Approval Limits' tab, enter the user's transaction dollar and count limits.

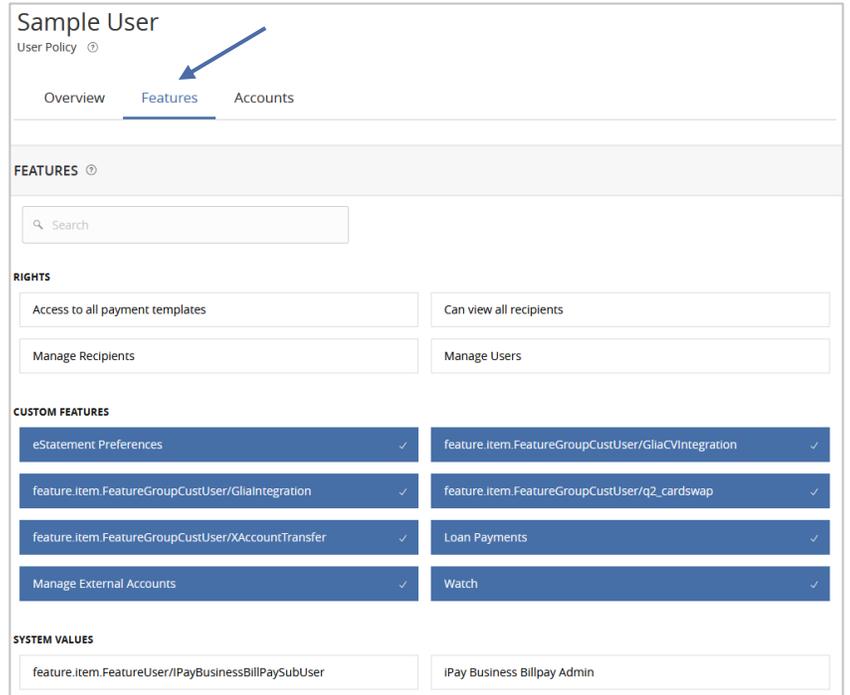
NOTE: Repeat steps 5- 8 for each transaction type.

Rights Approval Limits

Maximum Amount ⓘ		Maximum Count ⓘ	
Per transaction	\$ 9,999,999.00	Per Account Per Day	25
Per Account Per Day	\$ 9,999,999.00	Per Day	50
Per Day	\$ 9,999,999.00	Per Month	100
Per Month	\$ 9,999,999.00		

Questions? We're here to help.
Customer Service: 203.652.2940

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



Sample User
User Policy ⓘ

Overview **Features** Accounts

FEATURES ⓘ

Search

RIGHTS

Access to all payment templates Can view all recipients

Manage Recipients Manage Users

CUSTOM FEATURES

eStatement Preferences ✓ feature.item.FeatureGroupCustUser/GlaCVIntegration ✓

feature.item.FeatureGroupCustUser/GlaIntegration ✓ feature.item.FeatureGroupCustUser/q2_cardswap ✓

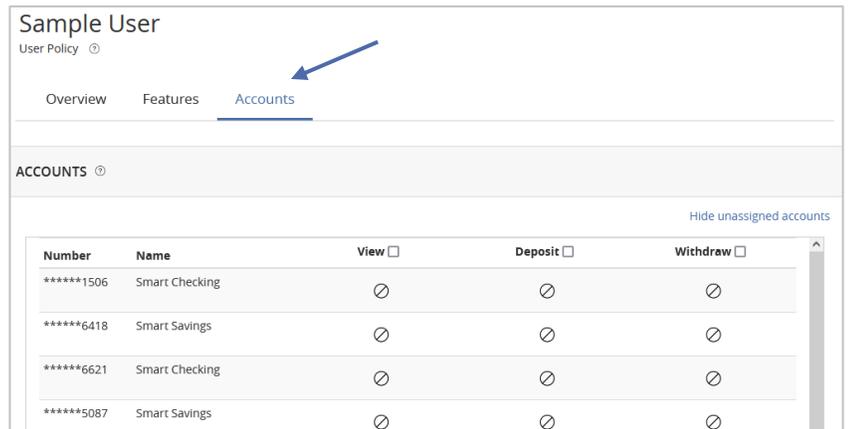
feature.item.FeatureGroupCustUser/XAccountTransfer ✓ Loan Payments ✓

Manage External Accounts ✓ Watch ✓

SYSTEM VALUES

feature.item.FeatureUser/IPayBusinessBillPaySubUser IPay Business Billpay Admin

11. On the 'Accounts' tab, designate the user's account rights.
12. Click the 'Save' button in the top right corner of the screen.



Sample User
User Policy ⓘ

Overview Features **Accounts**

ACCOUNTS ⓘ

Hide unassigned accounts

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
*****1506	Smart Checking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
*****6418	Smart Savings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
*****6621	Smart Checking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
*****5087	Smart Savings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Maintaining Existing Users

1. Click the pencil icon to edit the existing user.
2. Click on 'Assign Rights' towards the bottom right corner of the screen.

Follow steps 5-10 in the 'Creating New Users' section above.

User Details

Status
Active
[Edit Status](#)

PERSONAL DETAILS

First Name	Last Name	Email Address
Jane	Smith	jane.smith@mybankwell.com
Phone Country	Phone	
United States	(203)652-2690	

USER LOGINS

Login Name	Channel	Status	Last Logon	Actions
testdemo	Internet	Normal	12/19/2022	⋮

[Cancel](#) [Delete](#) [Assign Rights](#)

