

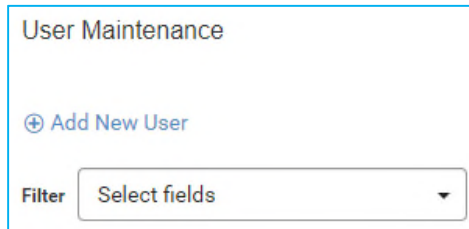
User Maintenance Quick Reference Guide

USER MAINTENANCE

You can manage users from the **User Maintenance** widget. The widget allows you to add, view, modify, and delete users as well as maintain the features and functions that users have access to.

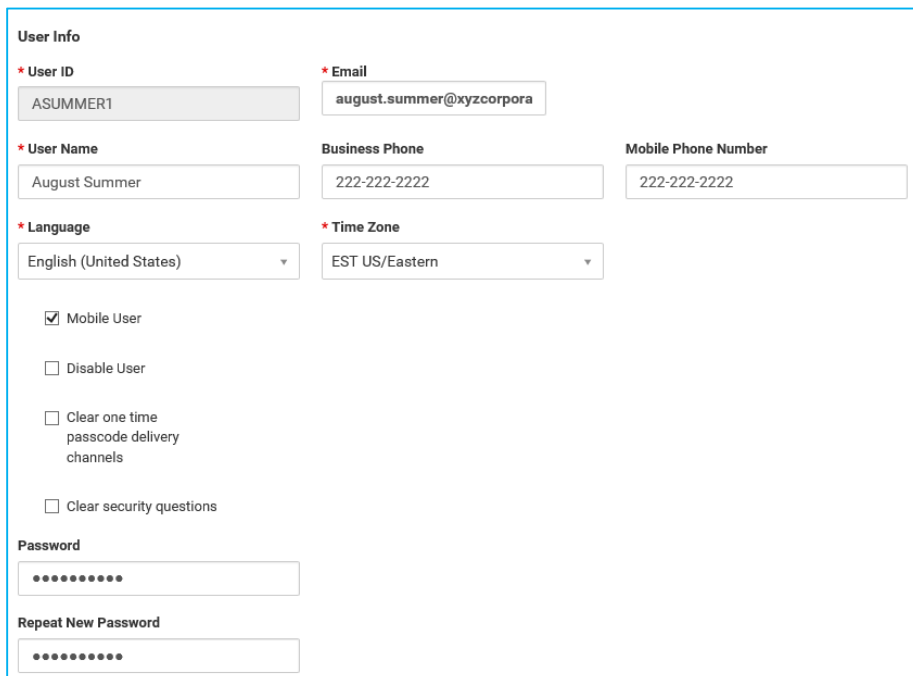
ADDING A USER

1. From the **User Maintenance** widget, click **Add New User**. If the User Maintenance widget is not visible, use the Add Widgets drop-down to select it and add to the bottom of your workspace.



The screenshot shows the 'User Maintenance' widget. At the top, it says 'User Maintenance'. Below that is a blue link with a plus icon that says 'Add New User'. At the bottom, there is a 'Filter' section with a dropdown menu currently set to 'Select fields'.

2. Enter a **User ID**.
3. Enter a **User Name**.
4. Enter the user **Email** address.
5. (optional) Enter a **Business Phone** Number.
6. (optional) Enter a **Mobile Phone Number**, if applicable.
7. Select the user's **Time Zone**.
8. Check the **Mobile User** box if you want this user to be able to use the mobile app.
9. Enter a temporary **Password**.
10. Enter the password again in the **Repeat New Password** text box.



The screenshot shows the 'User Info' form. It has several fields and checkboxes:

- * User ID**: Text box containing 'ASUMMER1'
- * Email**: Text box containing 'august.summer@xyzcorpora'
- * User Name**: Text box containing 'August Summer'
- Business Phone**: Text box containing '222-222-2222'
- Mobile Phone Number**: Text box containing '222-222-2222'
- * Language**: Dropdown menu set to 'English (United States)'
- * Time Zone**: Dropdown menu set to 'EST US/Eastern'
- Mobile User**
- Disable User**
- Clear one time passcode delivery channels**
- Clear security questions**
- Password**: Text box with masked characters '.....'
- Repeat New Password**: Text box with masked characters '.....'

11. If you want to assign an existing user’s permissions to this new user, use the **Existing User** drop-down to select a user.
12. In the **Permissions** section, check the box(es) for the permissions you would like to grant. You can select all permissions by checking the **Select All Permissions** box.

Permissions

Select All Permissions

<input checked="" type="checkbox"/> Add/edit entries to address book	<input checked="" type="checkbox"/> Approve Payments	<input checked="" type="checkbox"/> Approve entries in address book
<input checked="" type="checkbox"/> Bill Payment	<input checked="" type="checkbox"/> Legacy Reports	<input checked="" type="checkbox"/> Pay employees (direct deposit)
<input checked="" type="checkbox"/> Remote Check Deposit	<input type="checkbox"/> Require approval from another user	<input checked="" type="checkbox"/> Send electronic payments, non-expedited
<input checked="" type="checkbox"/> Send expedited payments (wire transfer)	<input checked="" type="checkbox"/> Send loan payments and drawdowns	<input checked="" type="checkbox"/> Statements
<input checked="" type="checkbox"/> Submit stop payments	<input checked="" type="checkbox"/> User is an Administrator	<input checked="" type="checkbox"/> Submit account transfers
		<input checked="" type="checkbox"/> View account balances and transactions

- If you choose **Select All Permissions**, you may wish to deselect **Require approval from another user**. This will allow the user to process payments without requiring a different user to approve the payment before it is processed.
- Special consideration should be given when selecting the **User is an Administrator** permission. This permits this User Maintenance function where the user can grant permissions, accounts and limits beyond those assigned to them.

13. In the **Assign Accounts** section, select the accounts the user will have access to. If you want to assign all company accounts to this user, check the **Assign All Accounts** box. If you check this box, the user will have access to company accounts added to Eastern Business Banking in the future.

Assign Accounts

Assign Account Access Assign All Accounts ⓘ

All current and future accounts are assigned to this user for all permitted features.

14. Use the **Limits** section to define overall dollar limits for transfers, wires and ACH transactions. These can be set at a daily cumulative or individual transaction limit.

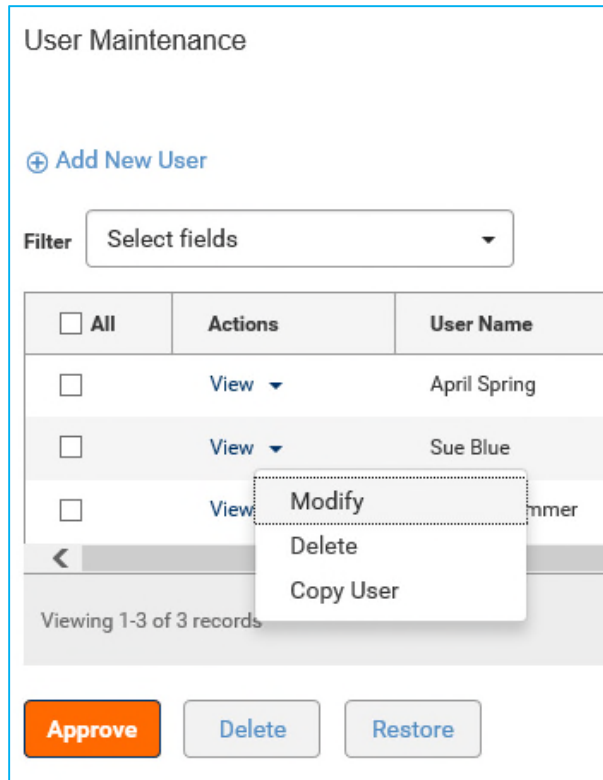
Limits

Daily	Transaction	Batch
<input type="text" value="25000"/>	<input type="text" value="5000"/>	<input type="text"/>

15. When complete, click **Add User**. You will receive a confirmation message and the user will appear in the User Maintenance widget in Entered status.
16. In the **User Maintenance** widget, select the user and click **Approve** from the **Actions** list to approve this user.

MODIFYING A USER

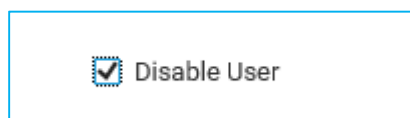
1. In the **User Maintenance** widget, select the user you want to modify and click **Modify** from the **Actions** list.



2. Make the desired changes to the user and click **Update**.
3. You will receive a confirmation message and the user will appear in the User Maintenance widget in Modified status. Click **Approve** from the **Actions** list to approve the modifications to this user.

DISABLING A USER

1. In the **User Maintenance** widget, select the user you want to disable and click **Modify** from the **Actions** list.
2. Check the **Disable User** box and then click **Update**.



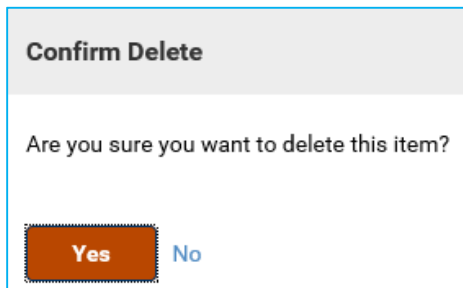
3. You will receive a confirmation message and the user will appear in the User Maintenance widget in Disabled status.

ENABLING A USER

1. In the **User Maintenance** widget, select the user you want to enable and click **Modify** from the **Actions** list.
2. Uncheck the **Disable User** box and then click **Update**.
3. You will receive a confirmation message and the user will appear in the User Maintenance widget in Modified status. Click **Approve** from the **Actions** list to approve the modifications to the user.

DELETING A USER

1. In the **User Maintenance** widget, select the user you want to delete and click **Delete**.
2. You will receive a message to confirm you wish to delete the user. Click **Yes**.



3. A confirmation message will appear and the user will appear in the User Maintenance widget in Deleted status.