

Online User Management

1. Click “Users” under the *Commercial* menu then click “Add User”.

User Management

Search Users

Add User

User	Email Address	Last login
First Last	First.Last@CompanyName.com	2 months ago
First Last	First.Last@CompanyName.com	2 months ago
First Last	First.Last@CompanyName.com	2 months ago
First Last	First.Last@CompanyName.com	2 months ago

2. Enter the required fields for the new user and click “Save” when completed.

New User

First Name (Max 25 Characters) * Last Name (Max 50 Characters) *

Email Address * Phone Country * Phone *

Login ID * Password * Confirm Password *

* - Indicates required field

Cancel Save

First Name should not exceed 25 characters.
Last Name should not exceed 50 characters.
Login ID must be between 6 and 50 characters.
Login ID contains invalid characters.
Passwords do not match.
Must be between 8 and 20 characters.
Must contain at least 1 number.
Password must contain a minimum of 1 lower case characters.
Password must contain a minimum of 1 upper case characters.
Password must contain a minimum of 1 special characters.
Password may not contain the following characters <>@:

3. Once the user is created, you will need to set the user’s entitlements and limits.

- To adjust, click the transaction type on the left navigation bar and adjust the *Rights* and *Approval Limits* for each transaction type that appears in the reading pane to the right.

Transactions Features Accounts

Transaction Filter:

Filter: **All** Enabled Disabled

ACH Pass Thru
Can view no transactions
Can Draft/Approve/Cancel
\$11.00

ACH PASS THRU Enabled

Rights

Draft Approve Cancel View None

Approval Limits

	Maximum Amount	Maximum Count
Per Transaction	\$ 11.00	
Daily	\$ 11.00	999999999
Monthly	\$ 115,575,000.00	999999999

Bill Payment
Can view no transactions
Can Draft/Approve/Cancel

Change of Address
Can view own transactions
Can Draft/Approve/Cancel

Check Reorder
Can view no transactions
Can Draft/Approve/Cancel

NOTE: *Rights* is where you can approve or remove certain authorization. *Approval Limits* lets you can adjust the limits for the user. Both of these will have to be changed individually for every transaction type in the left navigation bar the user needs access to.

- Select the appropriate non-transaction features by clicking to turn on an alert and click to turn off an alert.

Transactions **Features** Accounts

FEATURES ?

Search

RIGHTS

Access to all payment templates

Allow one-time recipients

Can view all recipients

Enable Centrix Positive Pay

Manage Recipients

Manage Users

- Designate the user's *Account* rights. Remove access by clicking and give access by clicking . To give access to all accounts in one click, click the small boxes next to the column titles.

Transactions Features **Accounts**

ACCOUNTS ?				
Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
SAV-XXXXX	Free Savings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SAV-XXXXX	Corporate Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DDA-XXXXX	Operating account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DDA-XXXXX	Revolving Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

NOTE: If you assign rights to a user to deposit into one of your business account(s) and the user makes a check deposit using the mobile banking app, please be aware that the user will receive all future deposit email notifications for all of your business accounts. This includes any check deposit(s) made into any of your business accounts by any user, regardless of the user's rights to view or deposit into that account. Users who have made a deposit will continue to receive deposit email notifications until you notify Rockland Trust to delete them.

- To finalize your changes, click "Save" at the top right.

Test User **Save**
 User Policy ?

Overview Features Accounts

- Go back to "Users" under the *Commercial* menu and click the pencil to edit the user.

User Management **Add User**

Search Users

User	Email Address	Last login	
First Last	First.Last@CompanyName.com	2 months ago	<input checked="" type="checkbox"/>
First Last	First.Last@CompanyName.com	2 months ago	<input type="checkbox"/>
First Last	First.Last@CompanyName.com	2 months ago	<input type="checkbox"/>
First Last	First.Last@CompanyName.com	2 months ago	<input type="checkbox"/>

9. View user info as well as modify their rights by clicking “Assign Rights”.

View User

First Name (Max 25 Characters) *	Last Name (Max 50 Characters) *
First	Last
Email Address *	
First.Last@CompanyName.com	
Phone Country *	Phone *
United States	(123)456-7890

Login Name	Channel	Status	Last Logon
ExampleUser	Internet	Normal	MM/DD/YYYY

* - Indicates required field