

Online User Management

Creating Online Users

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

The screenshot shows the 'User Management' interface. On the left, a dark blue sidebar menu contains various options: Accounts, Messages, Move My Money, Activity Center, Bill Pay, Alerts, Statements, Commercial, and Users. The 'Users' option is highlighted with a red box. The main content area is titled 'User Management' and features a search bar labeled 'Search Users'. Below the search bar is a table with columns for 'User', 'Email Address', and 'Last login'. The table contains four rows of user data, each with a 'First Last' name, an email address 'First.Last@CompanyName.com', and a 'Last login' date of '2 months ago'. An 'Add User' button is located in the top right corner of the main area, highlighted with a red box.

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.

4. To toggle access, click the blue hyperlink for each entitlement.

NOTE: For quick toggling of access, click the ✓ to remove access and click the ⊘ to grant access. You can also click the blue hyperlinks under *View* to change the user's view setting for each feature.

Test User User Policy ⓘ Save

[Overview](#) [Features](#) [Accounts](#)

| Transaction Type | Approval Limit | Per Day Approval Limits | Per Month Approval Limits | Per Account Approval Limits | Draft | Approve | Cancel | View |
|--------------------------------------|----------------|-------------------------|--------------------------------|-----------------------------|-------|---------|--------|------|
| ACH Collection | | 999,999,999 / \$0.01 | 999,999,999 / \$4,600,000.00 | 999,999,999 / \$0.01 | ⊘ | ✓ | ✓ | All |
| ACH Passthru | \$0.01 | 999,999,999 / \$0.01 | 999,999,999 / \$115,575,000.00 | | ✓ | ⊘ | ✓ | Own |
| ACH Payment - Single | \$0.01 | 999,999,999 / \$0.01 | 999,999,999 / \$4,600,000.00 | 999,999,999 / \$0.01 | ✓ | ✓ | ⊘ | No |

5. Once you click the blue hyperlink of each entitlement you will be brought to a detailed page for that specific entitlement.

[Overview](#) [Features](#) [Accounts](#)

ACH COLLECTION [Change](#) Enabled

[Rights](#) [Approval Limits](#)

| | |
|-----------------------------|---------------------------|
| Draft | ⊘ Cannot draft. |
| Approve | ✓ Can approve. |
| Cancel | ✓ Can cancel. |
| View Online Activity | Can view all transactions |

NOTE: Under *Rights*, you can approve or remove certain rights.

Rights **Approval Limits**

MAXIMUM AMOUNT ⓘ

Per transaction **\$0.01** ✎

Per Account Per Day **\$0.01** ✎

Per Day **\$0.01** ✎

Per Month **\$0.01** ✎

MAXIMUM COUNT ⓘ

Per Account Per Day **999,999,999** ✎

Per Day **999,999,999** ✎

Per Month **999,999,999** ✎

Maximum transaction amount per month

\$ ✕

| | | |
|--------|---|-------|
| 1 | 2 | 3 |
| 4 | 5 | 6 |
| 7 | 8 | 9 |
| Delete | 0 | Clear |

NOTE: Under *Approval Limits*, you can adjust the limits for various scenarios by clicking each scenario on the left menu and entering the amount with the keypad on the right.

- Select the appropriate non-transaction features by clicking the description. If the box is blue with a checkmark at the end, that *Feature* is activated for the user.

Overview **Features** Accounts

FEATURES ⓘ

RIGHTS

| | |
|--|-----------------------------|
| Access to all payment templates | Allow one-time recipients ✓ |
| Can view all recipients | Enable Centrix Positive Pay |
| Manage Recipients | Manage Users |
| Recipient upload from batch ✓ | Statement Image ✓ |
| Wire upload from batch (requires Multi-Wire) ✓ | |

GENERATED TRANSACTION

| | |
|-----------------------|-------------------|
| Enable Multi-Transfer | Enable Multi-Wire |
|-----------------------|-------------------|

CUSTOM FEATURES

| |
|--|
| feature.item.FeatureGroupCustUser/EnableLinkForLoanPa... ✓ |
|--|

7. 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.

Overview Features **Accounts**

ACCOUNTS ⓘ

Hide unassigned accounts

| Number | Name | View <input type="checkbox"/> | Deposit <input type="checkbox"/> | Withdraw <input type="checkbox"/> |
|--------|------------------------|-------------------------------------|----------------------------------|-----------------------------------|
| SAV | Free Savings | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| DDA | Commercial Checking | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| DDA | Free Business Checking | <input type="checkbox"/> | <input type="checkbox"/> | <input 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.

8. You can hide unassigned accounts by clicking "Hide Unassigned Accounts".

Overview Features **Accounts**

ACCOUNTS ⓘ

Hide unassigned accounts

| Number | Name | View <input type="checkbox"/> | Deposit <input type="checkbox"/> | Withdraw <input type="checkbox"/> |
|--------|------------------------|-------------------------------------|----------------------------------|-----------------------------------|
| SAV | Free Savings | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| DDA | Commercial Checking | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| DDA | Free Business Checking | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

9. To finish, click “Save” at the top right.

Test User

User Policy ⓘ

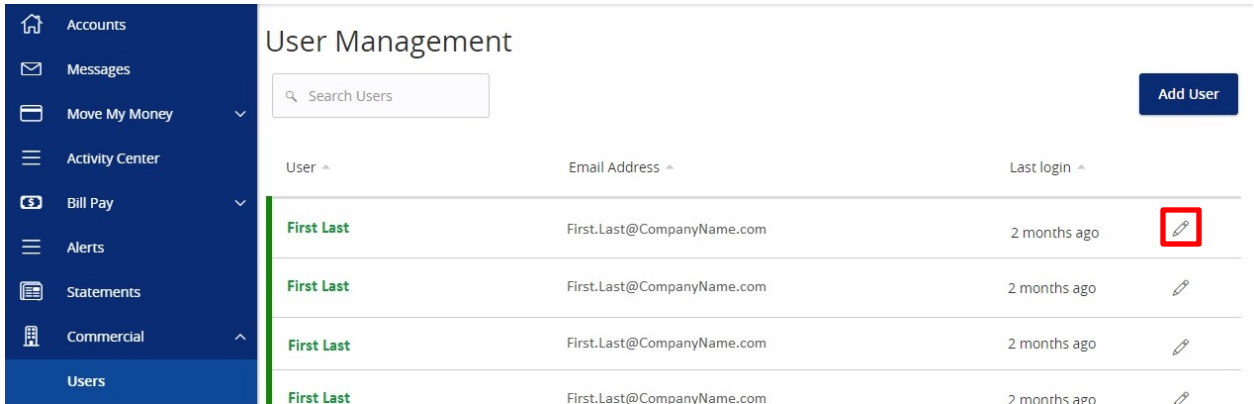
Save

Overview





Features

Accounts

10. Go back to “Users” under the *Commercial* menu and click the pencil to edit the user.



The screenshot shows the 'User Management' page. On the left is a navigation menu with 'Users' selected. The main area has a search bar and an 'Add User' button. Below is a table of users:

| 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 |  |

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

View User

First Name (Max 25 Characters) *

First

Last Name (Max 50 Characters) *

Last

Email Address *

First.Last@CompanyName.com

Phone Country *

United States

Phone *

(123)456-7890

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

* - Indicates required field

Cancel

Delete

Assign Rights