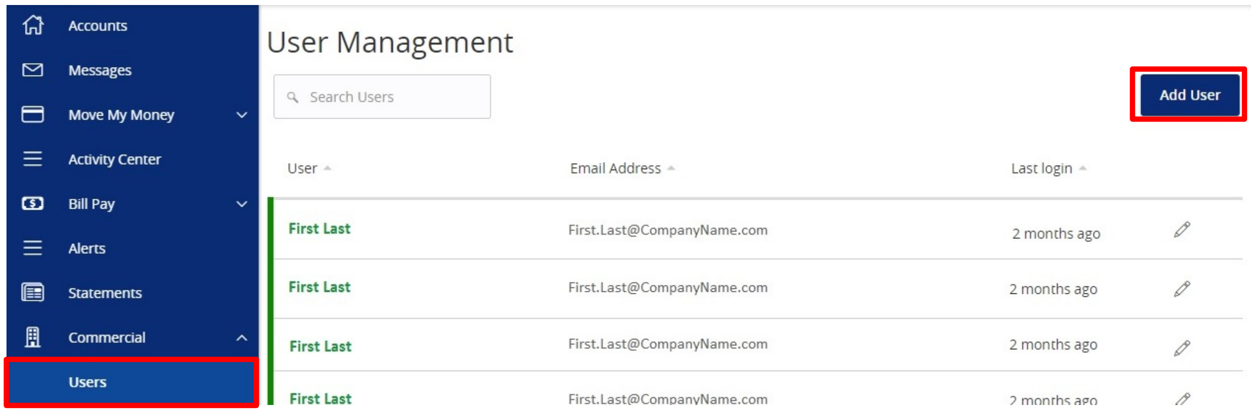
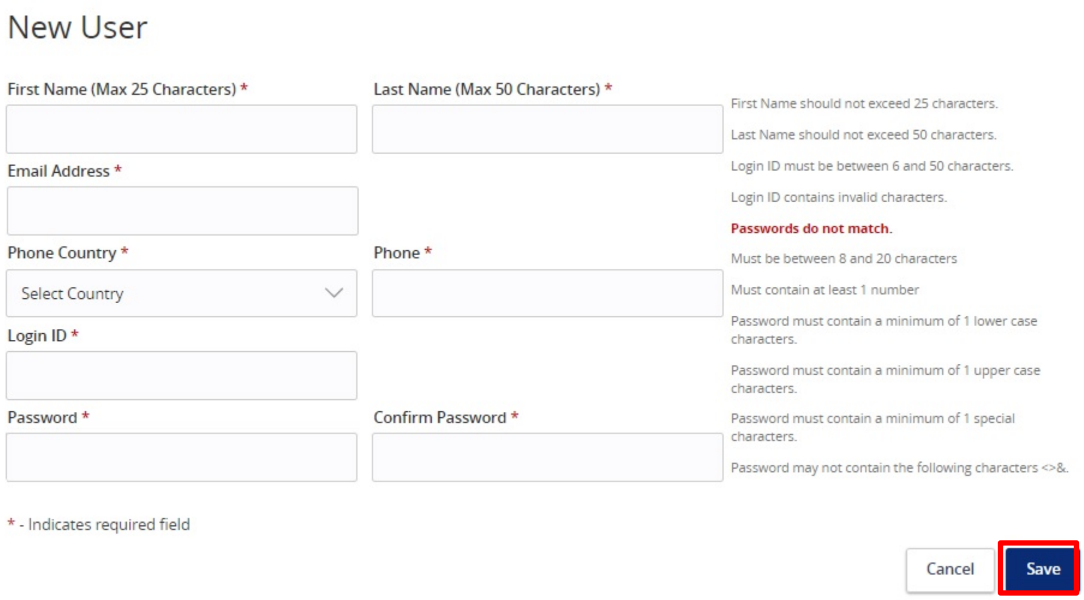
Online User Management

Creating Online Users

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



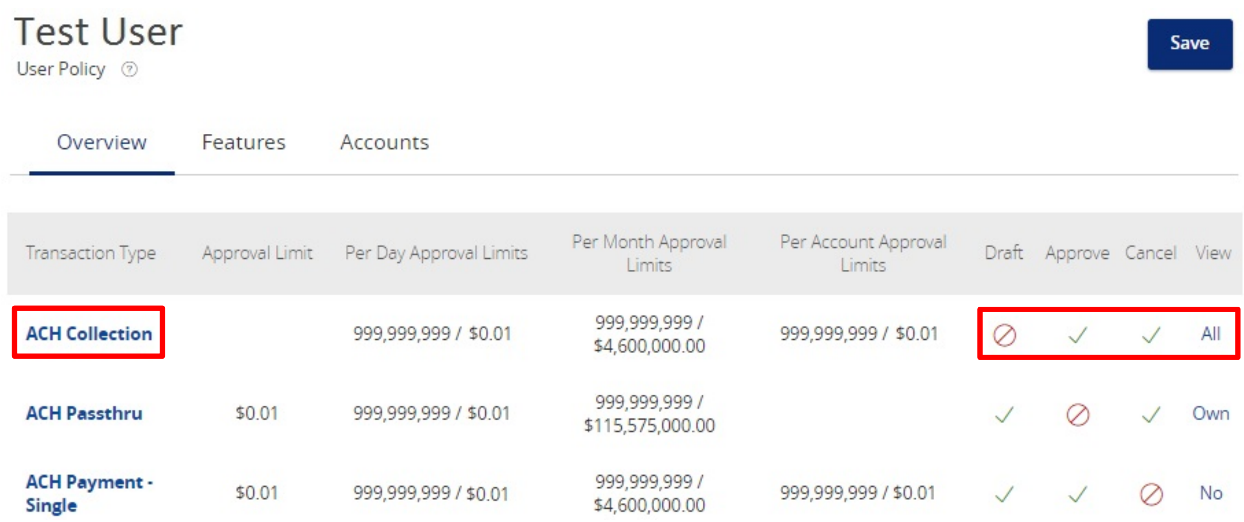
2. Enter the required fields for the new user and click “Save” when completed.



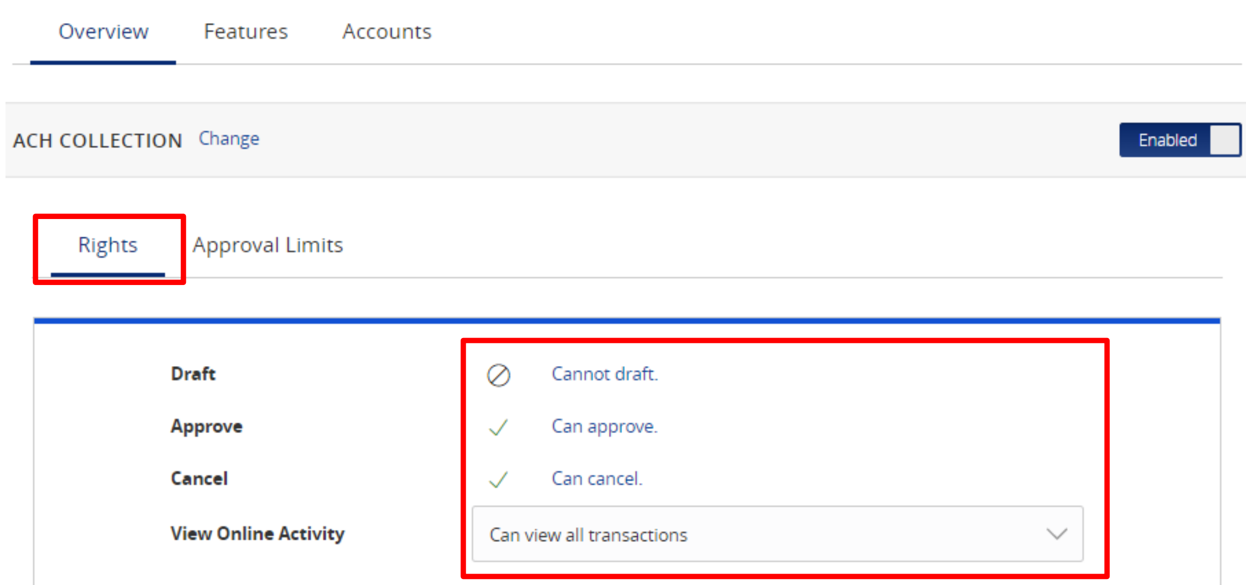
3. Once the user is created, you will need to set the user’s entitlements and limits.

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

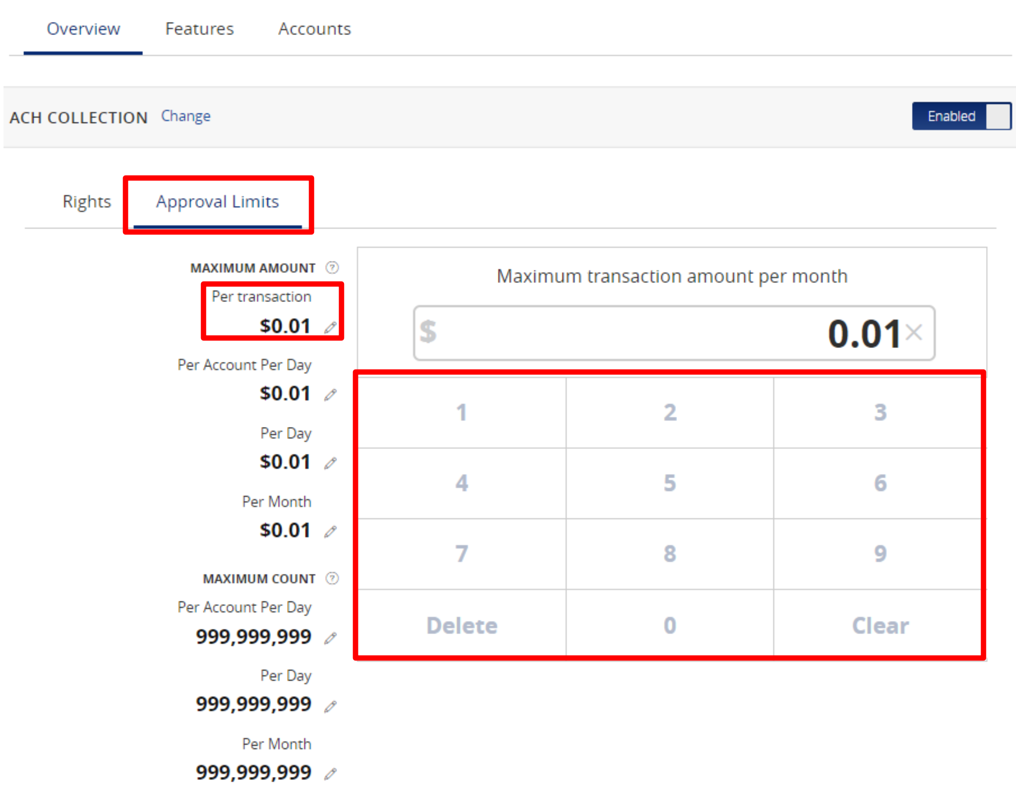
NOTE: For quick toggling of access, click the ✓ to remove access and click the ⊘ to grant access. You can also click the blue hyperlinks under *View* to change the user's view setting for each feature.



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

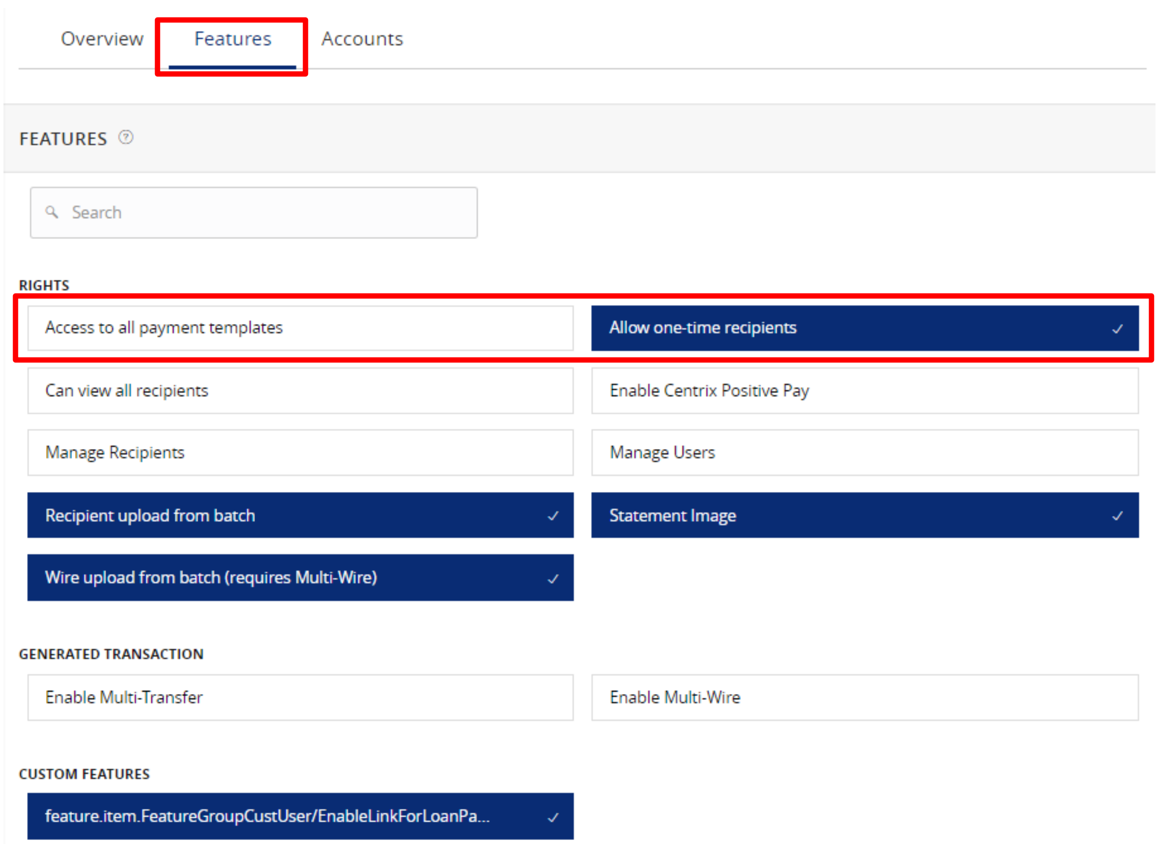


NOTE: Under *Rights*, you can approve or remove certain rights.

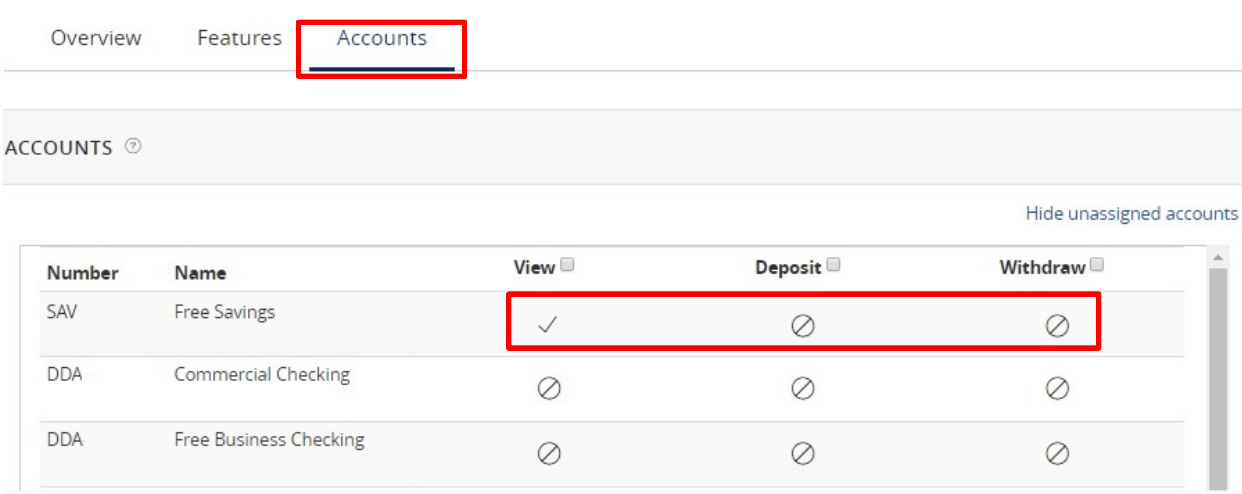


NOTE: Under *Approval Limits*, you can adjust the limits for various scenarios by clicking each scenario on the left menu and entering the amount with the keypad on the right.

6. 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.

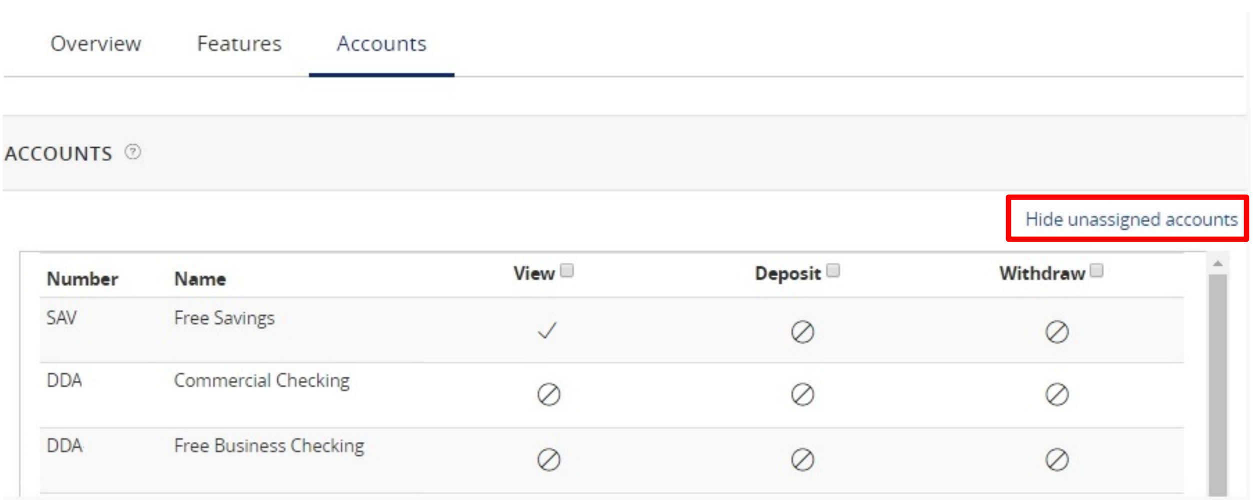


7. Designate the user's *Account* rights. Remove access by clicking ✓ and give access by clicking ⊘. To give access to all accounts in one click, click the small boxes next to the column titles.



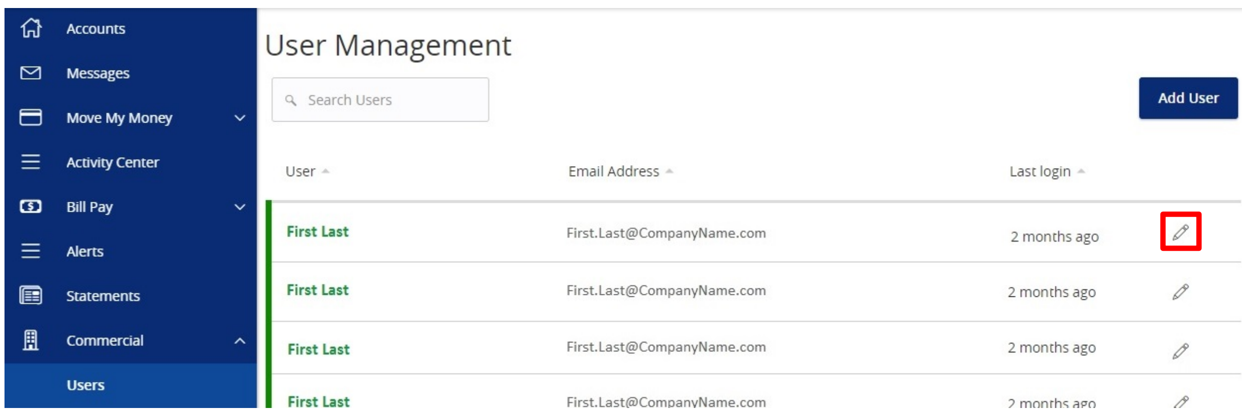
NOTE: If you assign rights to a user to deposit into one of your business account(s) and the user makes a check deposit using the mobile banking app, please be aware that the user will receive all future deposit email notifications for all of your business accounts. This includes any check deposit(s) 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".



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

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



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