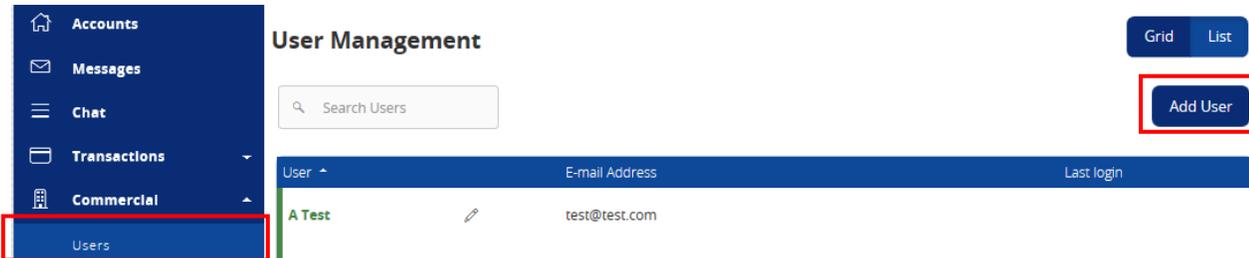


Online User Management

Creating Online Users

1. Select the 'Users' option under the 'Commercial' menu.
2. Click the 'Add User' button on the right side of the screen.



3. Enter the required fields for the new user.
4. Click the 'Save' button on the bottom right hand corner of the screen.

The 'New User' form contains the following fields and validation rules:

- FIRST NAME ***: Text input with value 'Sample'.
- LAST NAME ***: Text input with value 'User'.
- E-MAIL ADDRESS ***: Text input with value 'sample@company.com'.
- PHONE COUNTRY ***: Dropdown menu with value 'United States'.
- PHONE ***: Text input with value '(512)555-1111'.
- LOGIN ID ***: Text input with value 'sampleuser'.
- PASSWORD ***: Password input field with masked characters '.....'.
- CONFIRM PASSWORD ***: Password input field with masked characters '.....|'.

Validation rules listed on the right side of the form:

- Login ID must be at least 6 characters long.
- Login ID must be no more than 50 characters long.
- Login ID contains invalid characters.
- Passwords do not match.
- Password must be at least 8 characters long.
- Password can be no more than 20 characters long.
- Password must contain a minimum of 1 numbers.
- 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 <->.

* - Indicates required field

Buttons: 'Cancel' and 'Save' (highlighted with a red box).

5. Click on each transaction type to configure the user's entitlements and limits.

Sample User

User Policy (i)

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	\$999,999,991,000	999,999,990 / \$999,999,999,990	999,999,990 / \$999,999,999,990	99,999,990 / \$999,999,999,990	✓	✓	✓	
ACH Passthru	\$999,999,999,990	999,999,990 / \$999,999,999,990	999,999,990 / \$999,999,999,990		✓	✓	✓	
ACH Payment - Single	\$999,999,991,000	999,999,999 / \$999,999,999,990	999,999,990 / \$999,999,999,990	999,999,990 / \$999,999,999,990	✓	✓	✓	
ACH Payments	\$999,999,999,990	999,999,990 / \$999,999,999,990	999,999,990 / \$999,999,999,990	999,999,990 / \$999,999,999,990	✓	✓	✓	
ACH Receipt - Single	\$999,999,991,000	999,999,990 / \$999,999,999,990	999,999,990 / \$999,999,999,990	999,999,990 / \$999,999,999,990	✓	✓	✓	
Bill Pay								
Change Address		999,999,990	999,999,990	999,999,990	✓	✓	✓	

- Click on any transaction type to edit the user's limits and rights. Please note that if you disable the transaction type completely, the user's rights to view those types of transactions in the Activity Center do not change. You must manually change their view rights, if applicable.

The screenshot shows the 'Sample User' configuration page. At the top, there are tabs for 'Overview', 'Features', and 'Accounts'. Below these, the 'ACH COLLECTION' feature is shown as 'Enabled' with a toggle switch. The 'Rights' tab is selected, showing a list of permissions:

Draft	✓	Can draft.
Approve	✓	Can approve.
Cancel	✓	Can cancel.
View Online Activity	👤	Can view own transactions.

- Enter the user's transaction dollar and count limits.

The screenshot shows the 'Sample User' configuration page with the 'Approval Limits' tab selected. The page displays various limits and a grid for maximum transaction counts:

- MAXIMUM AMOUNT**
 - PER TRANSACTION: \$10,000
 - PER ACCOUNT PER DAY: \$10,000
 - PER DAY: \$10,000
 - PER MONTH: \$50,000
- MAXIMUM COUNT**
 - PER ACCOUNT PER DAY: 5
 - PER DAY: 5
 - PER MONTH: 15
- Maximum transaction count per month**
 - Input field: 15x
 - Grid:

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

8. Select the appropriate non-transactional features.

9. Designate the user's account rights. Selecting the checkbox next to each right will enable or disable the right for all accounts.

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 e-mail 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 e-mail notifications until you notify Rockland Trust to delete them.

Internal Number	Name	View <input checked="" type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
DDA-XXXXX3572	Demand Dep	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DDA-XXXXX3580	Demand Dep	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SAV-XXXXX3946	Savings	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SAV-XXXXX3954	Savings	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. Select the link to show or hide unassigned accounts.

The screenshot shows a web interface with a navigation bar containing 'Overview', 'Features', and 'Accounts'. Below the navigation bar is a dark blue header with the word 'ACCOUNTS'. In the top right corner of the main content area, there is a link labeled 'Hide unassigned accounts' which is highlighted with a red rectangular box. Below this link is a table with the following columns: 'Internal Number', 'Name', 'View', 'Deposit', and 'Withdraw'. Each column has a checkbox icon. The table contains four rows of account data:

Internal Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
DDA-XXXXX3572	Demand Dep	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DDA-XXXXX3580	Demand Dep	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SAV-XXXXX3946	Savings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SAV-XXXXX3954	Savings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. Click the 'Save' button in the top right corner of the screen.

The screenshot shows a web interface for a 'Sample User'. At the top left, it says 'Sample User' and 'User Policy'. In the top right corner, there is a blue button labeled 'Save' which is highlighted with a red rectangular box. Below this is a navigation bar with 'Overview', 'Features', and 'Accounts'. Underneath is a dark blue header with 'ACCOUNTS'. The main content area contains a table with columns: 'Internal Number', 'Name', 'View', 'Deposit', and 'Withdraw'. Each column has a lock icon. The table lists several accounts:

Internal Number	Name	View	Deposit	Withdraw
XXXXXX4132	External Checking		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DDA-XXXXX3572	Commercial Checking	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DDA-XXXXX3580	Support	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SAV-XXXXX3946	Savings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SAV-XXXXX3954	Savings	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CD-XXXXX6715	Certificate	<input checked="" type="checkbox"/>		
XXXXXX2345	External Checking		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

12. Go back to the 'Users Menu' and click on the pencil icon to modify their rights and view user details, including their Login Name, Channel, Status, and Last Logon date.

View User

FIRST NAME (MAX 25 CHARACTERS) * LAST NAME (MAX 50 CHARACTERS) *

A Test

E-MAIL ADDRESS *
test@test.com

PHONE COUNTRY * PHONE *

United States (555)555-5555

Login Name	Channel	Status	Last Logon
Tester	Internet	Password Change Required	

* - Indicates required field