

1.) Select Users from the Commercial menu.

Click the **Add User** button located on the right-hand side of the screen.

2.) Next, enter all required fields marked with a red asterisk for the New User.

3.) Click the **Save** button once all fields have been completed.

4.) Click on each transaction type listed to configure the user entitlements and limits.

- Once a transaction type is clicked, you'll see the Rights tab. You'll be able to select the user's Draft, Approve, and Cancel rights by toggling the check marks on or off.

5.) Click the View Online Activity option to establish the necessary view rights.

- The "Can view all transactions" option allows viewing of transactions initiated by any Online Banking user within the company.

6.) The "Can view own transactions" option allows viewing of the User's own transactions.

7.) The "Cannot view own transactions" option allows no transactions to be viewed.

8.) On the "Approval Limits" tab, which is beside the "Rights" tab, enter the user's transaction dollar and count limit.

9.) Next, click on the "Features" tab which is located up at the top. Select the appropriate non-transactional features that the user should have access to.

10.) Next, click on the "Accounts" tab which is located to the right of the "Features" tab. Use this tab to designate the user account rights. The circle with a slash icon means that access is disabled, but can be enabled. A check mark means that access is enabled.

11.) Click the **Save** button to complete the process.