

USER MANAGEMENT



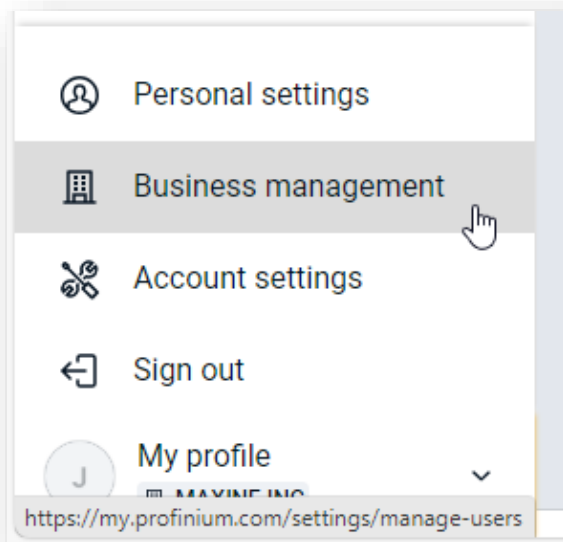
PROFINIUM

Your Amazing is Possible

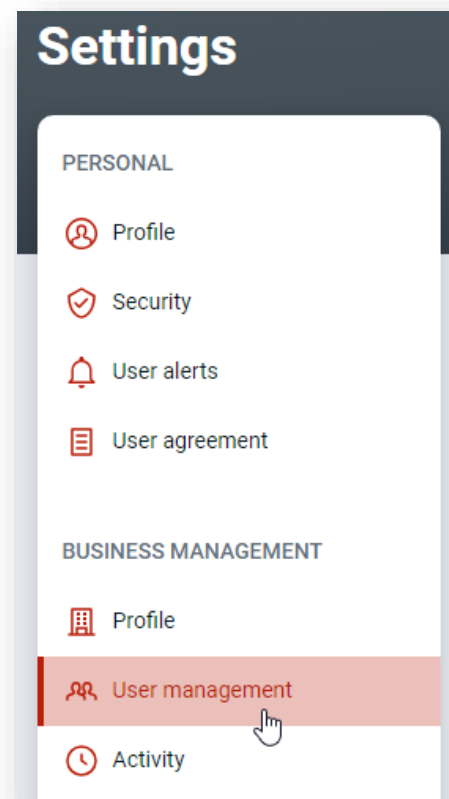
User Management

Click on My Profile in the lower right of the page.

Then click on Business Management.

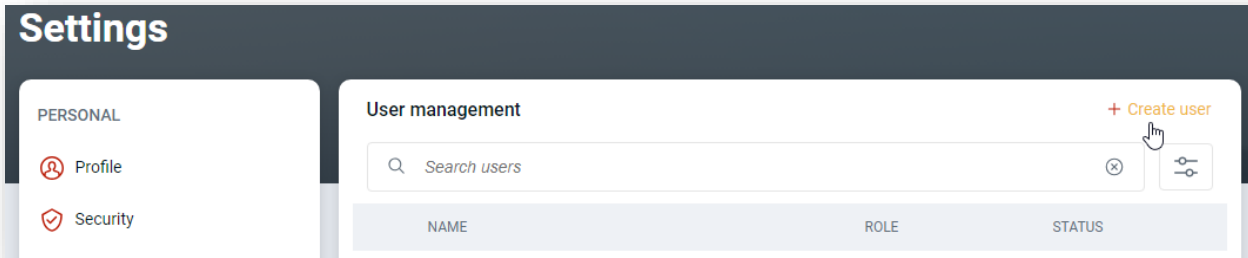


Click on User Management in the Settings menu.



Create User

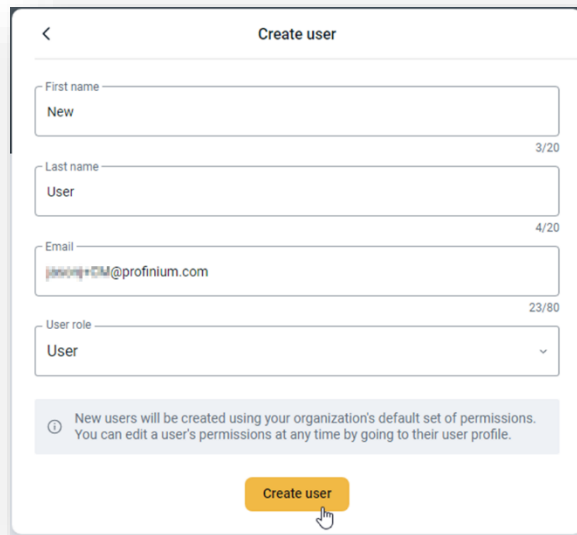
To add a new user, click on the Create User link in the upper right of the User Management screen.



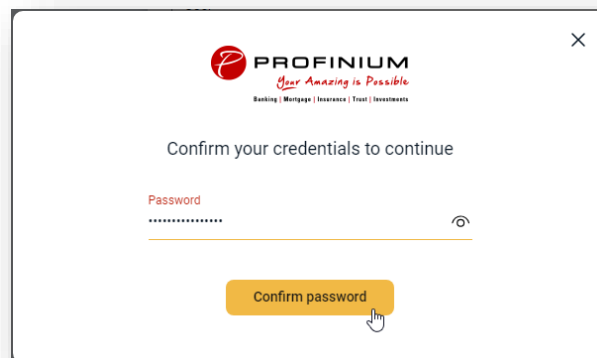
Enter the users first name, last name, email address, and their role.

The roles are:

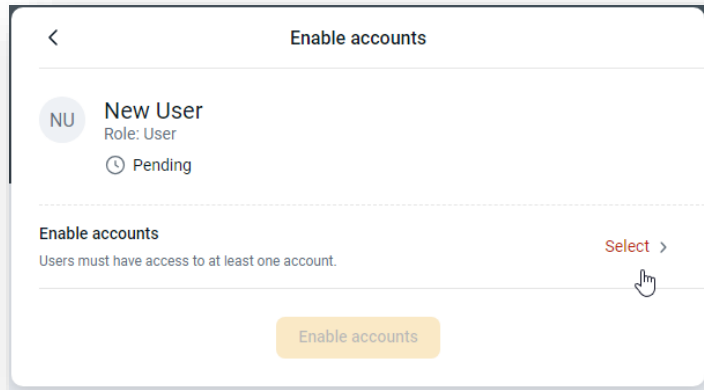
- Admin (Can create other users and should be used sparingly)
- Viewer (Can only view accounts)
- User (Can perform actions such as transfers, ACH, and wires)



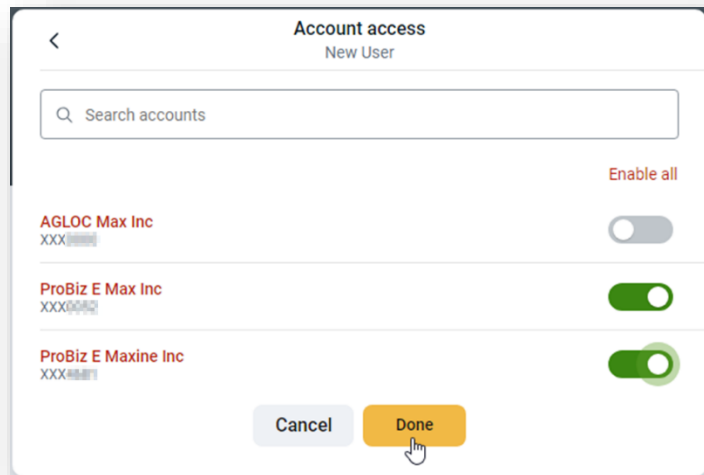
Confirm your password to continue.



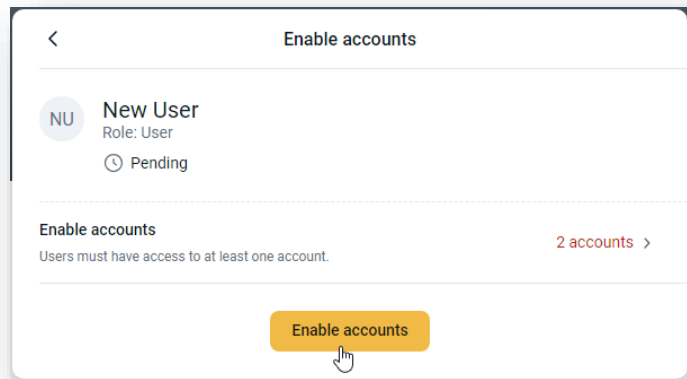
Click Select to assign the authorized accounts to the new user.



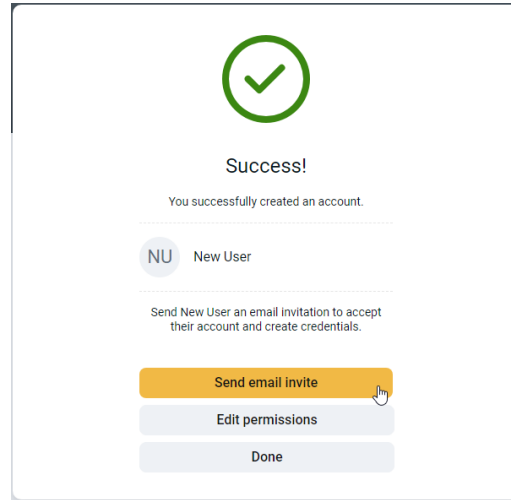
Use the toggle switches to turn account access on or off for the new user.



Click Enable accounts when done.

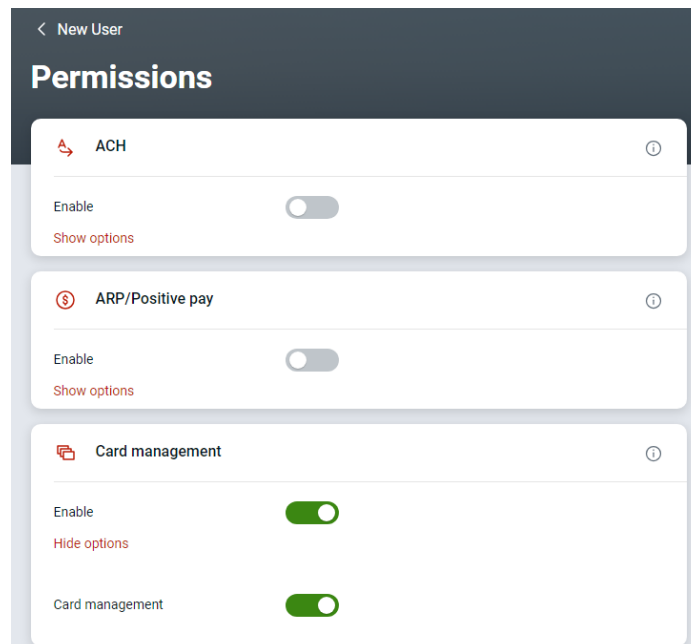


Click the Send email invite to send the new user the invitation to accept their account.



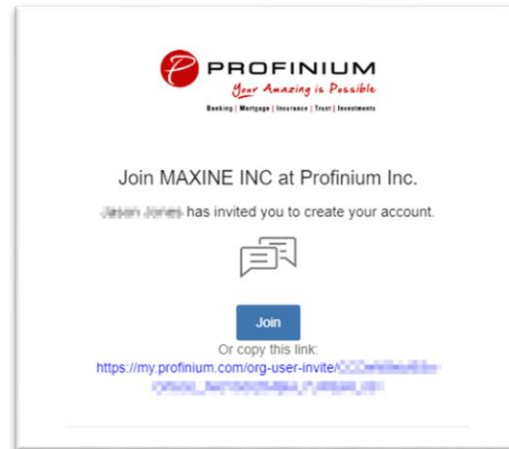
If you need to change the user's permissions from the default settings, click the Edit Permissions button.

Use the controls to add or remove settings for the new user. Refer to the User Permissions section for details on the individual controls.

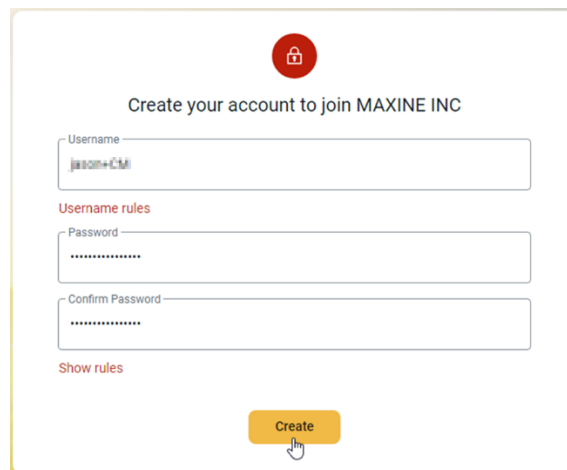


New User Setup

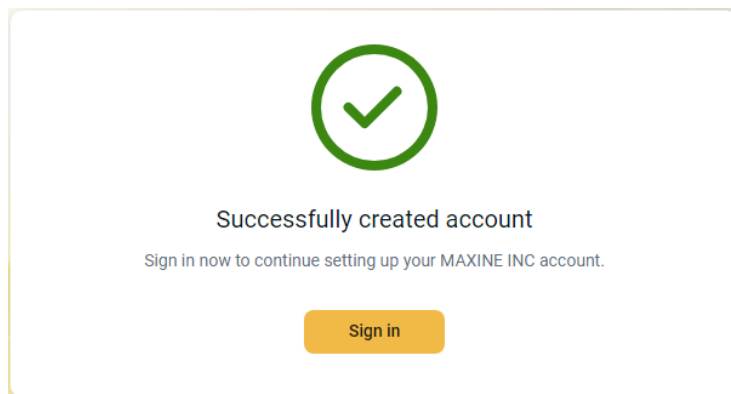
The new user will receive an email asking them to accept the invitation.



After clicking on the link in the invitation the user is taken to a page where they can select their username and set a password.

A web form for creating an account. It has a red lock icon at the top. The title is "Create your account to join MAXINE INC". There are three input fields: "Username" (with "jason+@td" entered), "Password" (with dots), and "Confirm Password" (with dots). Below the fields are "Username rules" and "Show rules" links. A yellow "Create" button is at the bottom with a mouse cursor over it.

After creating the username and password the user can then login.



On the initial login the new user will be prompted to set up 2-step authentication.



Protect your account with 2-step verification

Each time you sign into your account on an unrecognized device, we require your password and a verification code. Never share your code with anyone.



Add an extra layer of security

Enter your password and a unique verification code.



Keep the bad people out

Even if someone else gets your password, it won't be enough to sign into your account.

[Get started](#)



Voice or text message

Verification codes are sent to your phone.



Authy

Verification codes are sent to your phone or the Authy app.

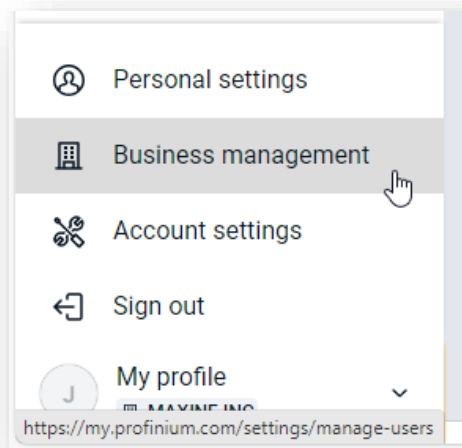


Authenticator app

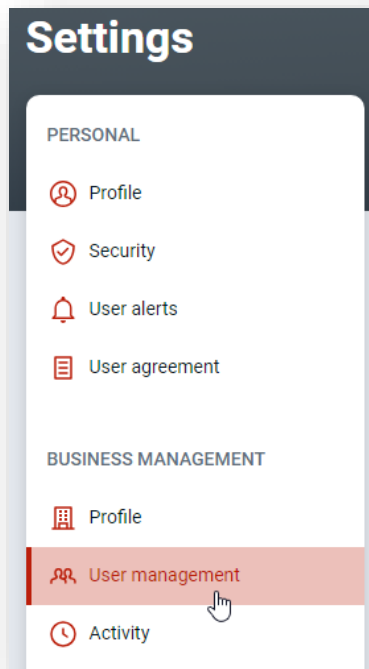
Using a different authenticator app? We support using any authenticator app using either a QR code scan or manual code entry.

Editing Users

Click on My Profile in the lower right of the page.
Then click on Business Management.



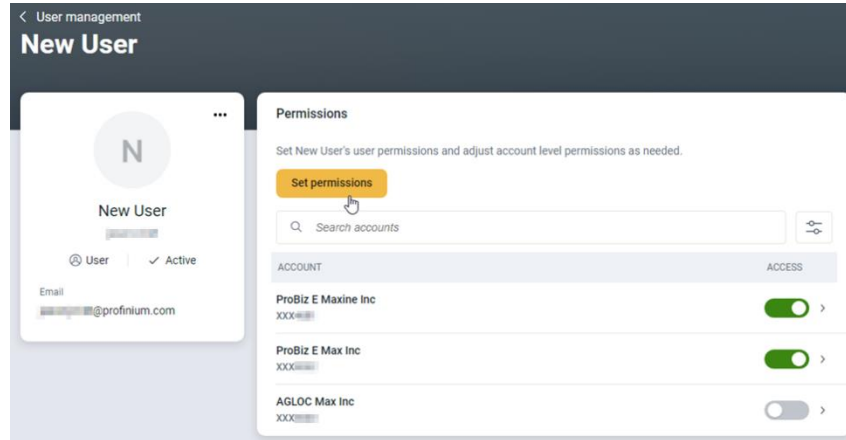
Click on User Management in the Settings menu.



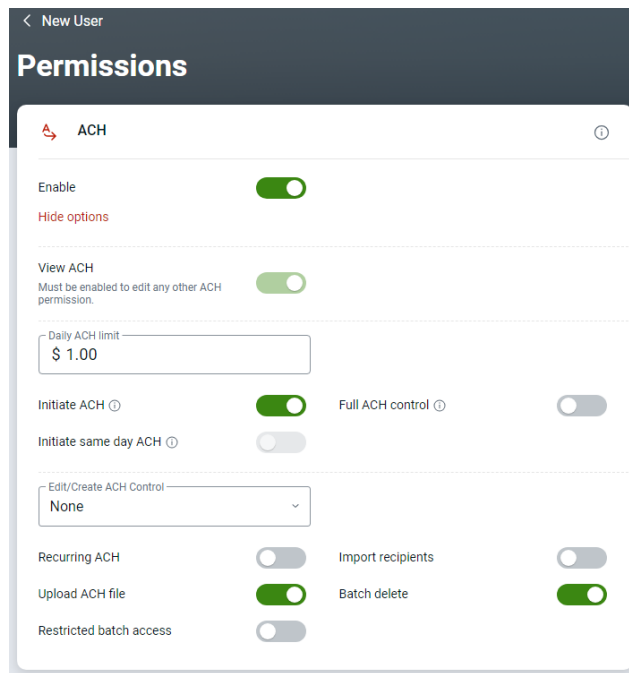
Click on the user you need to change in the User Management screen.

Set Permissions

To set what functions the user can perform, click on the Set Permissions button.



Enable or disable functions by using the Enable toggle switch in each section.



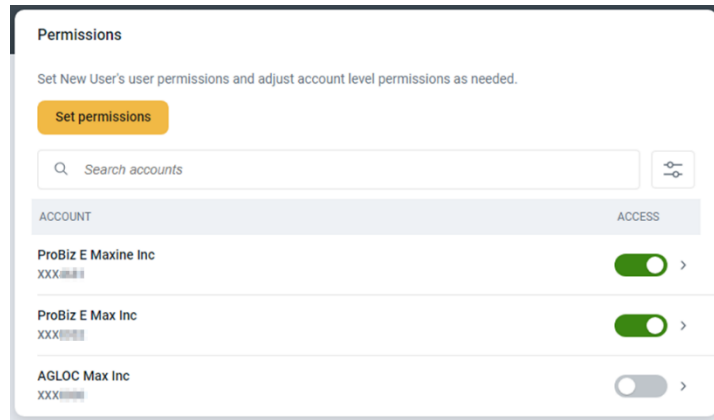
If options are greyed out here your company may not have contracted for that function. If you would like this added please contact your banker.

Refer to the User Permissions section for details on the individual controls.

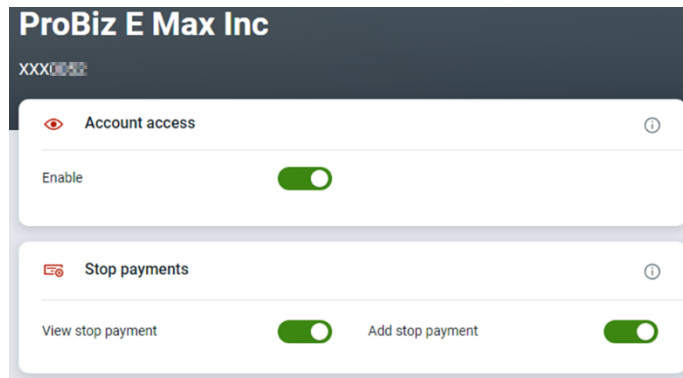
Account Access

You can control access to individual accounts for the user by selecting the Access control after each account.

If you want to select more specific access for the account, click on the right arrow next to the toggle switch for account access.

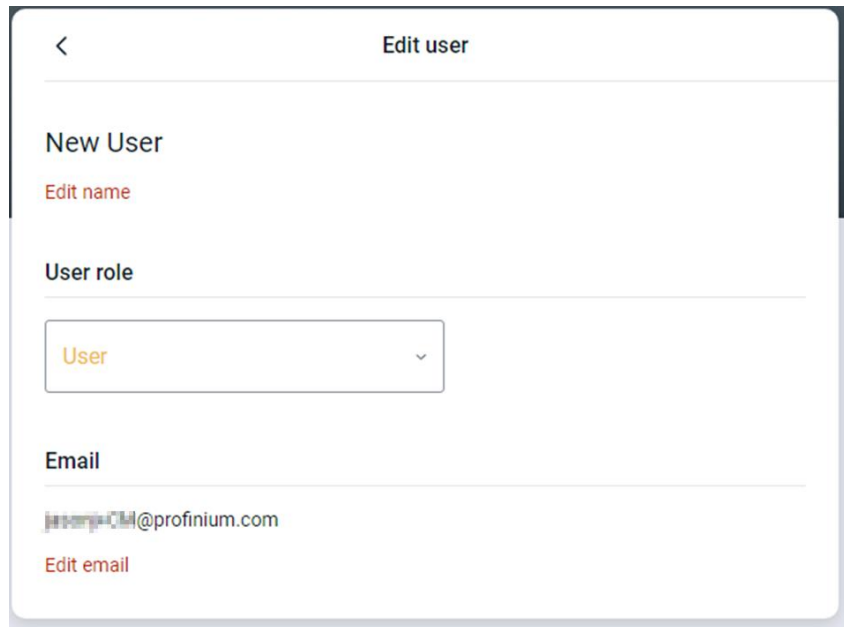
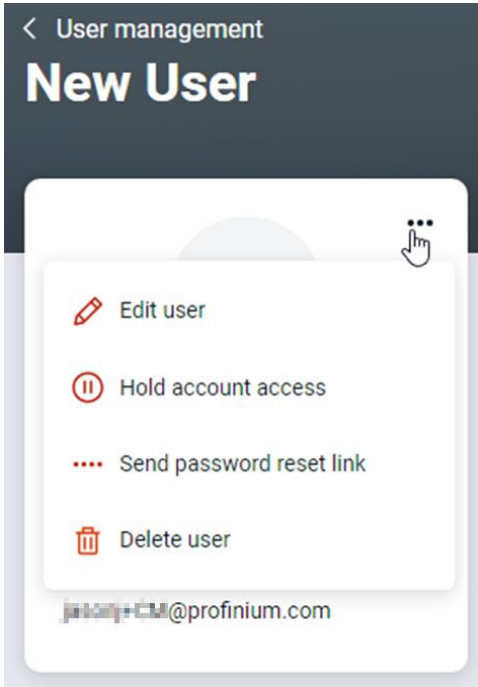


On this screen you can select specific rights for that account. If the options are greyed out, you will need to add authority for that function on the Set Permissions screen first.



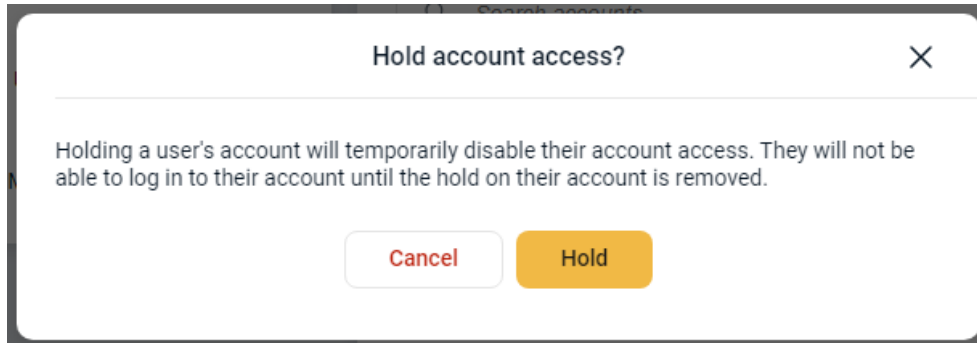
Edit User Information

You can edit a user's name, email address and role by selecting Edit User from the user's Profile display menu.



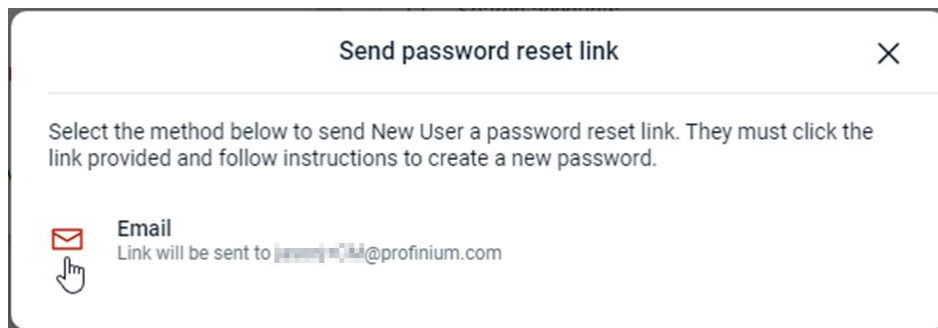
Hold A User

If you need to temporarily restrict a user's access, you can select the Hold account access option from the user's Profile display menu. This will keep the user from logging in until you release the hold.



Send Password Reset

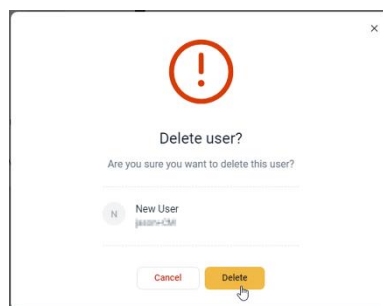
If a user needs a password reset, you can send them a link to reset their password by clicking on the Send password reset link on the user's Profile display menu.



Delete User

To delete a user's access, click the three dots in the upper right corner of the users Profile display.

Select Delete user from the menu.



User Permissions

ACH

Daily ACH Limit

This is the maximum amount the user is allowed to send through ACH in a single day.

Initiate ACH

This allows a user to initiate or send the ACH file.

Full ACH Control

Full ACH control allows a single user to create and send ACH files completely on their own. This should be avoided unless there is only a single person available to manage the ACH.

Initiate Same Day ACH

This allows a user to initiate or send Same Day ACH files.

Edit Create ACH

This sets the options for what control a user has for creating or editing ACH files. Full edit/create allows full control over the ACH file. Partial edit will allow a user to make changes, but these must be approved by a second user.

Recurring ACH

This allows a user to setup ACH files to be on a recurring schedule.

Import Recipients

User will be allowed to import ACH recipients from a file.

Upload ACH File

User will be allowed to upload an ACH file. For example, an ACH file generated by a third party payroll system.

Batch Delete

Allows a user to delete ACH batches.

Restricted Batch Access

Allows a user to view ACH batches that have been flagged as Restricted.

ARP/Positive Pay

By stopping fraudulent checks from posting to accounts, businesses can protect themselves and minimize loss. Given the ease of paying by check, Positive pay is one of the most effective tools businesses use to prevent check fraud. It gives organization users the ability to monitor items posted to accounts, pay an issued item, or return an item if it doesn't match the record in core.

Upload ARP/Positive Pay

Allows upload of a Positive Pay file.

Download ARP

Work ARP/Positive Pay

Allows a user to work any matched items in the Positive Pay dashboard.

Work ACH Exceptions

Allows a user to work any matched ACH exceptions in the Positive Pay dashboard.

Card Management

The Card management option allows the user to manage debit cards tied to the account.

Stop Payments

The Stop Payments option allows the user to create or manage Stop Payments. There are separate options for the ability to view the Stop Payments or to add them.

Transfers

Transfers allows the user to transfer funds between accounts. The transfer limit must be set to allow the user to make internal transfers between accounts.

User Management

The User Management option allows the user to create other users. This option should only be checked for users that have a specific need. Best practices for good security would be to create separate users that are only used to create users and have no other options.

We also recommend setting up the account to require dual control on all new users. If you have any questions on this, please contact Deposit Operations for additional information.

Wires

Wire transfers are one of the quickest and safest ways for sending money and ensuring funds are securely paid by electronic payment.

Work with Wires

Allows user to create, edit or approve wires. New users with Wires will also need to have account access added by Deposit Operations before they will be able to setup wire transfers.

Create Wire Templates

Allows a user to create wire templates. Wire templates allow wire details to be saved for future or recurring use. Wire templates are required for recurring wires.

Edit Wire Templates

Allows a user to edit existing wire templates.

Create One-time Wires

Allows a user to create a one-time wire.

Edit One-time Wires

Allows a user to edit an existing one-time wire.

Edit Recurring Wires

Allows a user to edit a recurring wire.

Per Wire Limit

This sets the amount a user is allowed to send in a single wire.

Daily Wire Limit

This sets the amount a user is allowed to send through all wires in a single day.

Dual Wire Control Limit

This controls the amount a user is allowed to approve on wires requiring dual control.

Transmit Wires

Allows a user to transmit a wire.

Transmit Recurring Wires

Allows a user to transmit recurring wires.

Dual Wire Control

Requires a user to have dual control on wires before they are transmitted.

Transmit Future-Dated Wires

Allows a user to transmit future dated wires.