

User Management (Member View)

Creating an Additional User:

1. Log into Digital Banking
2. Click on **Manage users**
3. In the upper right corner, click on + **Create user**
4. Enter in the first and last name and email for the person you want to add as a user
5. Select the type of user you want them to be
 - **User**
 - Funds management (create transactions, view balances, etc)
 - **Viewer**
 - Funds management (create transactions, view balances, etc)
 - View users
 - View user profiles
 - View user permissions
 - View user account permissions
 - **Admin**
 - Funds management (create transactions, view balances, etc)
 - View users
 - Create users
 - Delete users
 - Unlock users
 - Reset password
 - Hold account
 - View user profiles
 - Edit user profiles
 - View user permissions
 - Edit user permissions
 - View user account permissions
 - Edit user account permissions
6. Click **Create user**
7. Enter your password to confirm your identity
8. Within the section for Enable accounts, click on **Select**
9. Turn on all accounts you would like the user to have access to, if you want them to have access to all accounts, click on **Enable all** in the upper right corner
10. Click **Done**
11. Click **Enable accounts**



12. Click on **Edit permissions** to continue editing what the user will have access to

13. There are two main sections:

- **Permissions**

- Click on **Set permissions**
- Toggle on the permissions you want the user to have access to
 - Bill Pay
 - Card management
 - RDC (Remote Deposit Capture)
 - Self Service Forms
 - Stop payments
 - Transfers
 - ◆ Enter in the transfer limit for this user, if no limit enter \$999,999,999.00
 - ◆ You will need to also enable which accounts the user has access to transfer to/from. Steps shown below
 - User management
- Once you are done setting the permissions, click the < **User Name** in the upper left corner to go back to the user's profile
- You will see the accounts you turned on listed below the Set permissions button. Click on each account to turn on transfers in or out.
- This step must be done for users to be able to transfer funds between accounts.
- When done with the account, click on the < **User Name** to go back to the user's profile and select another account

- **Additional services**

- Toggle on the services you want the user to have access to
 - Apply for a loan
 - Certificate Renewal
 - Check Orders
 - Documents
 - Manage Payments
 - Open an account
 - Overdraft Services
 - Payoff Quote
 - Send Money
 - Spending Habits
- Click on the < **User Name** to go back to the user's profile
- Click on **Invite** in the gray bar at the top to send the user an invite email to enroll

Editing an Existing User:

1. Log into Digital Banking
2. Click on **Manage users**
3. Click on the user you want to edit



4. There are two main sections:

- **Permissions**

- Click on **Set permissions**
- Toggle on the permissions you want the user to have access to
 - Bill Pay
 - Card management
 - RDC (Remote Deposit Capture)
 - Self Service Forms
 - Stop payments
 - Transfers
 - ◆ Enter in the transfer limit for this user, if no limit enter \$999,999,999.00
 - ◆ You will need to also enable which accounts the user has access to transfer to/from. Steps shown below
 - User management
- Once you are done setting the permissions, click the < **User Name** in the upper left corner to go back to the user's profile
- You will see the accounts you turned on listed below the Set permissions button. Click on each account to turn on transfers in or out.
- This step must be done for users to be able to transfer funds between accounts.
- When done with the account, click on the < **User Name** to go back to the user's profile and select another account

- **Additional services**

- Toggle on the services you want the user to have access to
 - Apply for a loan
 - Certificate Renewal
 - Check Orders
 - Documents
 - Manage Payments
 - Open an account
 - Overdraft Services
 - Payoff Quote
 - Send Money
 - Spending Habits
- Click on the < **User Name** to go back to the user's profile

- **User Information**

- Click on the 3 dots above the user's name to edit the user's profile
 - Edit user – update the user's name or email
 - Hold account access – block the user from logging in temporarily or permanently
 - Send password reset link
 - Delete user – this is a permanent deletion

