



- Dashboard
- Messages
- Accounts
- Transfers
- Remote deposits
- Payments
- Bill pay
- Positive pay
- ACH
- Cash Management
- Support

Hi there!

Donald R Duck Tester

Admins can add new users and set permissions

Accounts

BOOKKEEPING x1234	\$56,123.55 Available	OPERATING CHECKING x5678	\$1,234.56 Available	DUCKS LOC 0022 x2233
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Add text

- Transfer
- Pay a bill
- Pay a person
- Message
- Documents

1

D

- Profile
- Support
- Settings
- Sign out

2

Transactions

INCOMING CHECK 123456	\$489.79
Pending Mar 3, BOOKKEEPING	
INTEREST PAYMENT SPLIT OUT	-\$0.01
Feb 28, Non 00 0002	
PRINCIPAL PAYMENT SPLIT OUT	-\$1.00
Feb 28, Non 00 0002	
PAYOFF	-\$1.01
Feb 28, Non 00 0002	

Messages

Daisy	10:40 AM
Form: Address Change Form - Sample	
Huey	Sep 5, 2024
Video chat	
Dewey	Aug 6, 2024
Video chat	

See more


Settings

PERSONAL

 Profile

 Security


 User alerts

 User agreement

BUSINESS MANAGEMENT

 Profile

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 User management

 Activity

ACCOUNTS

 Park State Bank

Profile



Donald Duck

Edit preferred first name





Email

dduck@parkstatebank.com

Need to update your information? We can help! Contact us to get started.

Settings

PERSONAL

-  Profile
-  Security
-  User alerts
-  User agreement

BUSINESS MANAGEMENT

-  Profile
-  **User management**


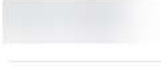

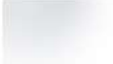
-  Activity

ACCOUNTS

-  Park State Bank

User management

4 [+ Create user](#)

	NAME	ROLE	STATUS
D	Donald Duck donaldd1	Admin	✓ Active
D	Daisy Duck daisyd	Viewer	✓ Active
M		Admin	✓ Active
M		Admin	⌚ Pending
M	Mary Duck mduck12	User	✓ Active
R		Admin	✓ Active
S		User	🔒 Locked



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Fill out the fields on the form for the new user

User Role Options:
User
Viewer
Admin



Create user

First name
Scrooge 7/20

Last name
McDuck 6/20

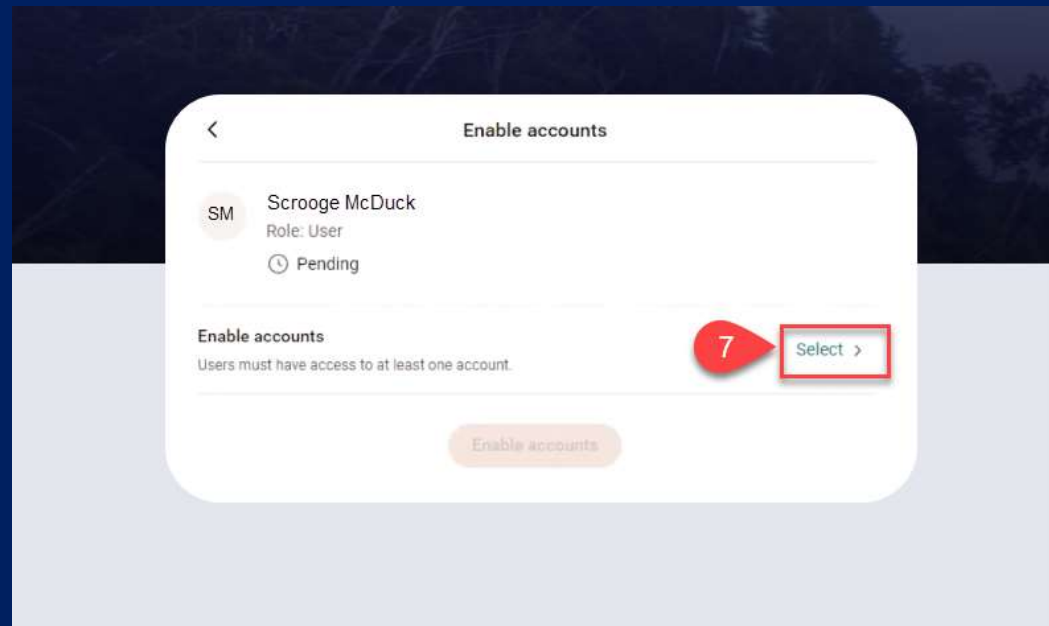
Email
smcduck@parkstatebank.com 25/80

User role
User

New users will be created using your organization's default set of permissions. You can edit a user's permissions at any time by going to their user profile.

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Create user





Dashboard

Messages

Accounts

Transfer

Recurring

Payments

Bill pay

Positive pay

ACH

Cash Management

Support

Select the accounts to be enabled and click Done

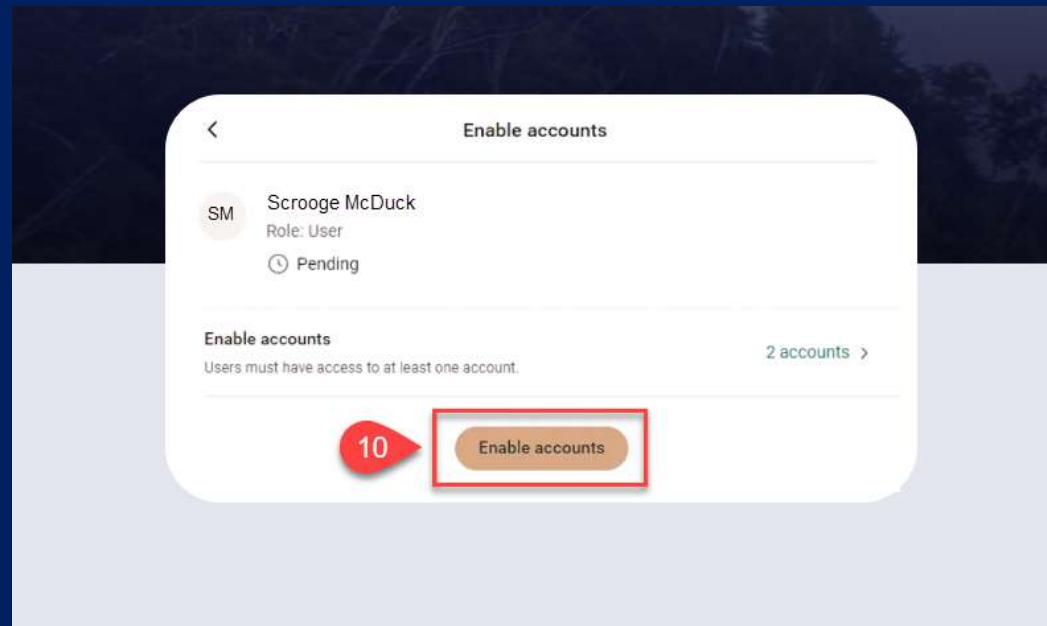
Account access
Scrooge Duck

Search accounts

Enable all

Home Eq 0004 XXX1804	<input type="checkbox"/>
Bus DDA 0008 XXX9876	<input checked="" type="checkbox"/>
Wires Acct XXX0000	<input type="checkbox"/>
Home Eq 0005 XXX1203	<input checked="" type="checkbox"/>
NOW Acct 0011 XXX3456	<input type="checkbox"/>
Bus DDA 0001	<input type="checkbox"/>

Cancel Done





You are presented with three options:

First Option: Send email invite sends an email to the user.

Second Option: Edit Permissions selects permissions for that user, such as ACH, Positive Pay, and more.

Third Option: Select Done if not yet ready to select permissions or send email invite.



Success!

You successfully created an account.

SM Scrooge McDuck

Send Scrooge McDuck an email invitation to accept their account and create credentials.

Send email invite

Edit permissions

Done