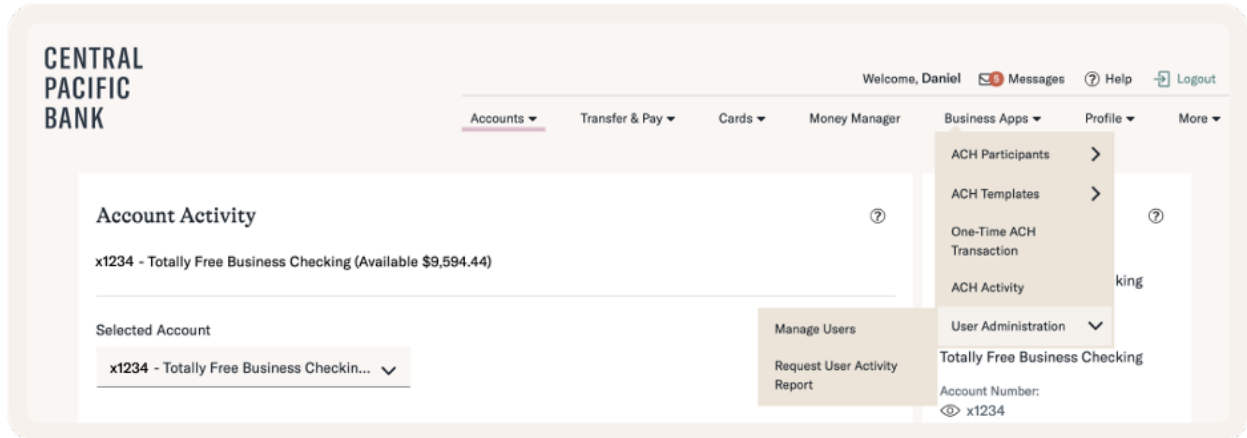
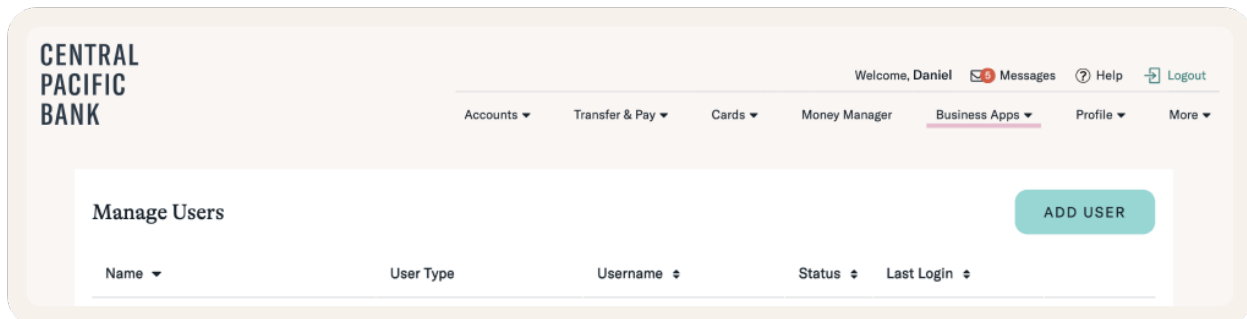


# User Management

## 1. Navigate to Business apps > User Administration > Manage Users



## 2. Add a user



**3. Enter applicable information, keeping in mind that fields with an asterisk (\*) indicate required fields.**

Username must be 8 to 25 characters long; special characters are allowed.

Passwords must be 8 to 32 characters long and must contain 3 out of the following: One uppercase letter, one lowercase letter, one number, and a special character (~!@#\$%^&\*()\_+={|:;?.,/)

This user can access this account via the temporary password for 15 minutes. If the user does not log in within that time, a new password will have to be reset.

Please input at least one phone number for the new user, because the new user will need it for security purposes.

### User Details

\* Username

\* Temporary Password

\* Confirm Password

Status  
 Active  Disabled  Locked

### Personal Information

Title

\* First Name

Middle Name

\* Last Name

Suffix

Birth Date

Social Security Number

### Contact Information

\* Email Address

Home Phone

Mobile Phone

Work Phone

ext.

### Home Address

Address Line 1

Address Line 2

City

State

ZIP Code

4. In the Entitlements screen, check off all the features and accounts that you want the user to have, then click Save (functions available will depend on your service plan).

Entitlements For Kainoa

| Entitlement                   | Limit       |  |
|-------------------------------|-------------|--|
| Accounts                      |             | <input checked="" type="checkbox"/>    |
| Deposit Checks                |             |  |
| Maximum Transaction Limit     | \$ 10.00    | <input type="text" value="10.00"/>     |
| Maximum Daily Limit           | \$ 10.00    | <input type="text" value="10.00"/>     |
| Stop Payments                 |             | <input checked="" type="checkbox"/>    |
| ACH                           |             | <input checked="" type="checkbox"/>    |
| Maximum Transaction Credit    | \$ 10000.00 | <input type="text" value="10,000.00"/> |
| Maximum Transaction Debit     | \$ -        | <input type="text" value="-"/>         |
| Maximum Batch Credit          | \$ -        | <input type="text" value="-"/>         |
| Maximum Batch Debit           | \$ -        | <input type="text" value="-"/>         |
| Number of Approvals Required  |             | <input type="text" value="0"/>         |
| Approve and Reject            |             | <input checked="" type="checkbox"/>    |
| Authorized ACH Companies      |             |  |
| Company Name                  |             | <input checked="" type="checkbox"/>    |
| Initiate                      |             | <input checked="" type="checkbox"/>    |
| Maximum Daily User Credit     | \$ -        | <input type="text" value="-"/>         |
| Maximum Daily User Debit      | \$ -        | <input type="text" value="-"/>         |
| Maximum Monthly User Credit   | \$ -        | <input type="text" value="-"/>         |
| Maximum Monthly User Debit    | \$ -        | <input type="text" value="-"/>         |
| Recurring                     |             | <input type="checkbox"/>               |
| Manage Batches & Participants |             | <input checked="" type="checkbox"/>    |
| Manage Denied Users           |             | <input type="checkbox"/>               |

|  |                                     |
|--|-------------------------------------|
| Manage Participant Distributions         | <input type="checkbox"/>            |
| Manage Restricted Batches                | <input type="checkbox"/>            |
| SEC Codes                                |                                     |
| PPD Credit - Consumer Credit             | <input checked="" type="checkbox"/> |
| Tax Payments                             | <input checked="" type="checkbox"/> |
| Bill Pay and Zelle®                      | <input checked="" type="checkbox"/> |
| Cards                                    | <input type="checkbox"/>            |
| MX MoneyDesktop<br>Money Management      | <input checked="" type="checkbox"/> |
| Order Checks                             | <input type="checkbox"/>            |
| Quicken® /<br>Quickbooks®                | <input type="checkbox"/>            |
| SecureNow Bypass<br>Verification Methods | <input type="checkbox"/>            |
| Statements                               | <input type="checkbox"/>            |
| Transfers                                | <input checked="" type="checkbox"/> |
| Maximum Transaction Limit                | \$ - <input type="text" value="-"/> |
| Maximum Daily Limit                      | \$ - <input type="text" value="-"/> |
| Number of Approvals Required             | <input type="text" value="0"/>      |
| Approve and Reject                       | <input checked="" type="checkbox"/> |
| Manage External Accounts                 | <input type="checkbox"/>            |

**Accounts**

|  | All Entitlements                    | Stop Payments                       | View                                | ACH From                            | Bill Pay                            | Transfer From                       | Transfer To                         |
|--|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| x1234 - Totally Free Business Checking | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| x1234 - Business Super Savings         | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

**Profiles**

|            | All Entitlements         | Bill Pay Access          | Update Profile           |
|------------|--------------------------|--------------------------|--------------------------|
| (Business) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## 5. Removing a user

If a user needs to be removed, it's important to mark the user as Disabled. This will ensure that any ACH batches the user might have created do not get cancelled.

**User Details**

\* Username

Reset Password

Status  
 Active  Disabled  Locked

**Personal Information**

Title

**Contact Information**

\* Email Address

Home Phone

Mobile Phone

Work Phone