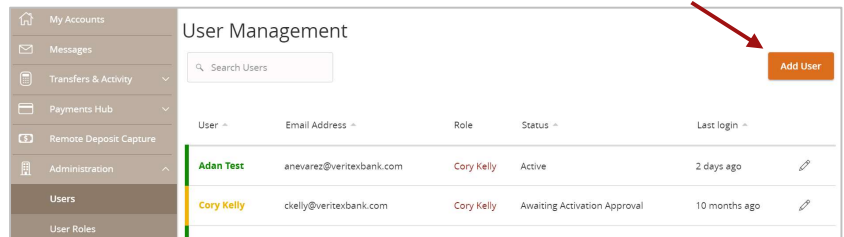


## Creating New Online Users

1. Select the 'Users' option under the 'Administration' menu.
2. Click the 'Add User' button to add a new online banking user.

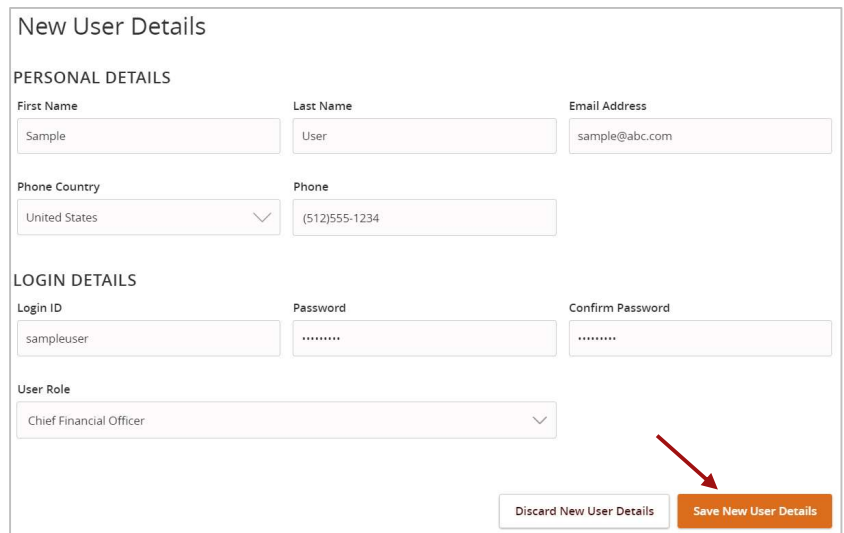


The screenshot shows the 'User Management' page. On the left is a navigation menu with options: My Accounts, Messages, Transfers & Activity, Payments Hub, Remote Deposit Capture, Administration, Users, and User Roles. The 'Users' option is selected. The main area has a search bar and an 'Add User' button in the top right corner, which is highlighted with a red arrow. Below the search bar is a table with columns: User, Email Address, Role, Status, and Last login.

User	Email Address	Role	Status	Last login
Adan Test	anevarez@veritexbank.com	Cory Kelly	Active	2 days ago
Cory Kelly	ckelly@veritexbank.com	Cory Kelly	Awaiting Activation Approval	10 months ago

3. Enter all fields on the form. Login ID and Password requirements are listed on the right side of the screen.
4. Assign a User Role to the user.
5. Click the 'Save New User Details' button when done.

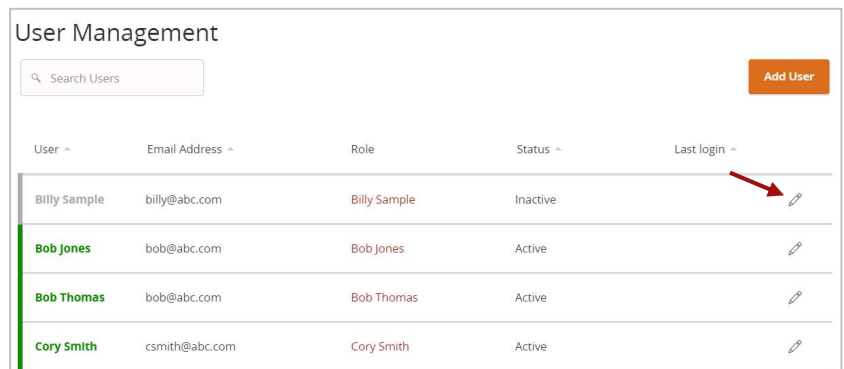
**NOTE:** If the new user requires entitlements different than any existing user role, copy an existing user role, make the necessary changes and then assign to the new user.



The screenshot shows the 'New User Details' form. It is divided into 'PERSONAL DETAILS' and 'LOGIN DETAILS' sections. The 'PERSONAL DETAILS' section includes fields for First Name (Sample), Last Name (User), Email Address (sample@abc.com), Phone Country (United States), and Phone ((512)555-1234). The 'LOGIN DETAILS' section includes fields for Login ID (sampleuser), Password (masked with dots), and Confirm Password (masked with dots). Below these is a 'User Role' dropdown menu set to 'Chief Financial Officer'. At the bottom right, there are two buttons: 'Discard New User Details' and 'Save New User Details', with the latter highlighted by a red arrow.

## Existing Online Users

1. Click the pencil icon next to an existing user to be updated.



The screenshot shows the 'User Management' page. It has a search bar and an 'Add User' button. Below is a table with columns: User, Email Address, Role, Status, and Last login. The table lists four users: Billy Sample (Inactive), Bob Jones (Active), Bob Thomas (Active), and Cory Smith (Active). A red arrow points to the pencil icon next to the 'Billy Sample' user row, indicating the edit function.

User	Email Address	Role	Status	Last login
Billy Sample	billy@abc.com	Billy Sample	Inactive	
Bob Jones	bob@abc.com	Bob Jones	Active	
Bob Thomas	bob@abc.com	Bob Thomas	Active	
Cory Smith	csmith@abc.com	Cory Smith	Active	

Questions? Call our customer support.

Phone: 833-VERITEX (833-837-4839) or 469-443-9912 (Treasury Support: 972-349-6195)

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2. Click 'Edit Status' to deactivate or reactivate an online user.

User Details

Status

Active

Edit Status

PERSONAL DETAILS

First Name

Bob

Last Name

Jones

Email Address

bob@abc.com

Phone Country

United States

Phone

(812)566-6666

- a. Click 'Deactivate User' to disallow a user from logging in without completely deleting the user.
- b. Click 'Activate User' to reactivate an online user.

Status

Active

Cancel

Deactivate User

Status

Inactive

Cancel

Activate User

3. Click the 'User Role' drop down menu to update the 'User Role' for a user. Click 'Update Role' upon completion.  
Note: The user role update will go into effect the upon the user's subsequent logon after the change has been made.
4. Click the ellipses (vertical dots) to unlock an online user.

**NOTE:** The ellipses will only be clickable beside a locked user.

USER ROLE

Manage User Roles

Current Role

Controller

Update Role

USER LOGINS

Login Name	Channel	Status	Last Logon	Actions
-bobjones123	Internet	Password Change Required		<div></div>

Cancel

Delete

5. Click the 'Delete' button to delete the online user.