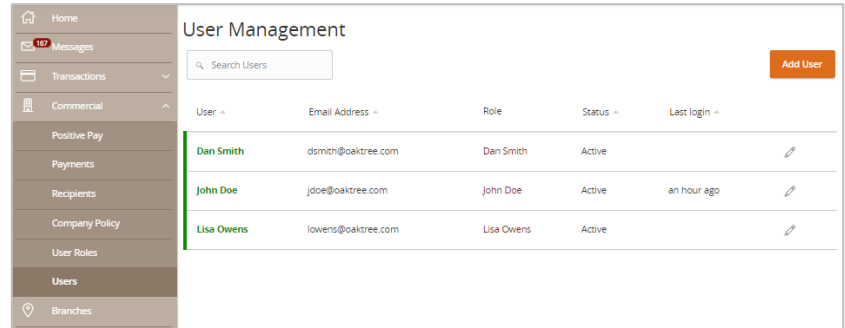


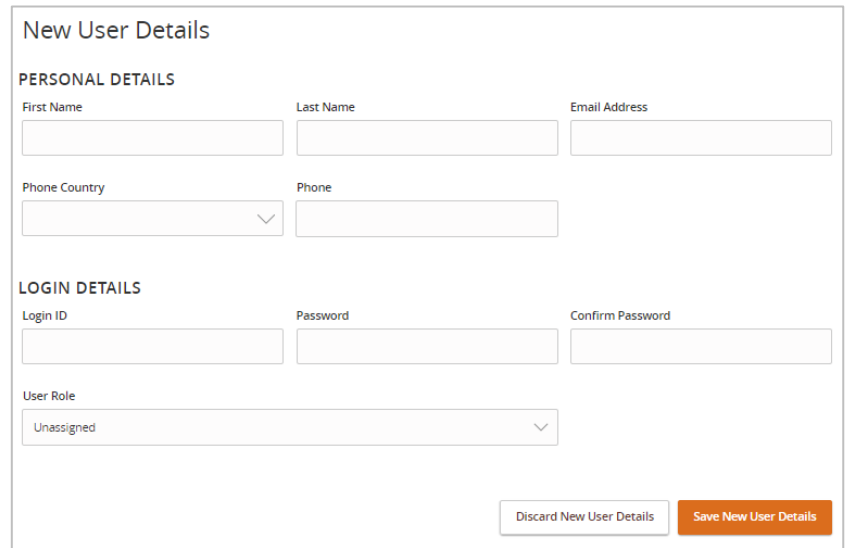
Creating New Online Users

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



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.



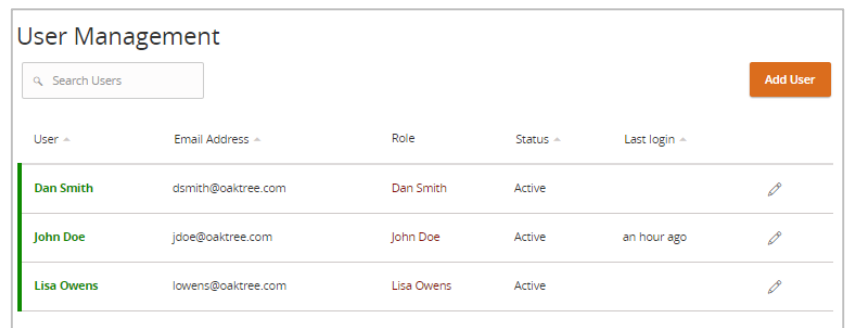
The 'New User Details' form is divided into two main sections:

- PERSONAL DETAILS:** Includes fields for First Name, Last Name, Email Address, Phone Country (dropdown), and Phone.
- LOGIN DETAILS:** Includes fields for Login ID, Password, and Confirm Password. Below these is a 'User Role' dropdown menu currently set to 'Unassigned'.

At the bottom right, there are two buttons: 'Discard New User Details' and 'Save New User Details'.

Existing Online Users

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



Questions? Call our customer support.
 Phone: 833-VERITEX (833-837-4839) or 469-443-9912

2. Click 'Edit Status' to 'Deactivate User' to disallow a user from logging in without completely deleting the user.
3. Click the 'Current 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 'Delete' button to delete the online user.

User Details

Status
Active
[Edit Status](#)

PERSONAL DETAILS

First Name Lisa	Last Name Owens	Email Address lowens@oaktree.com
Phone Country United States	Phone (214)123-4567	

USER ROLE

[Manage User Roles](#)

Current Role

[Update Role](#)

USER LOGINS

Login Name	Channel	Status	Last Logon	Actions
lowens	Internet	Password Change Required		⋮