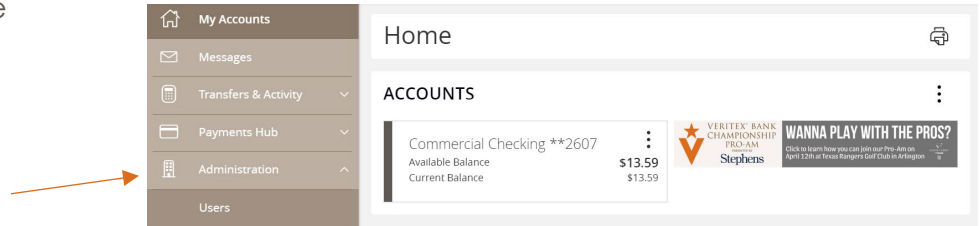


Creating Online Users

1. Select the 'Users' option under the 'Administration' menu.



2. Click the 'Add User' button on the right side of the screen.

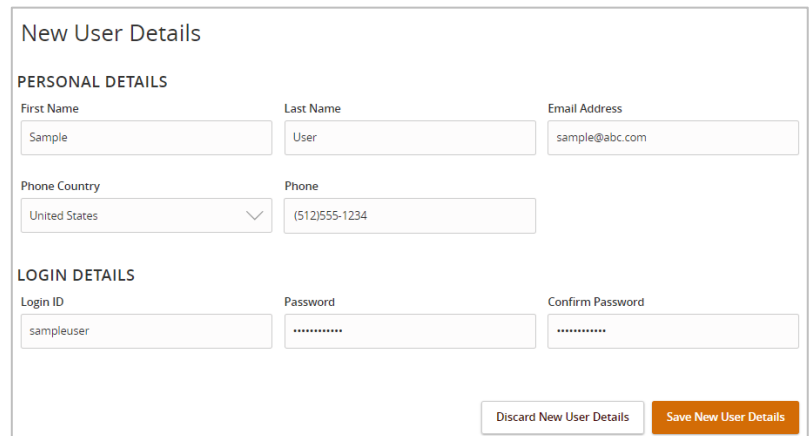


3. Enter the required fields for the new user.

NOTE: If the chosen user ID is already in use it will not allow you to save.

NOTE: User will be disabled and cannot login until the bank confirms the New User's permissions with the company administrator.

4. Click the 'Save New User Details' button on the bottom right-hand corner of the screen.
5. For added security you will be prompted to enter a Secure Access Code or Symantec Token code (if applicable).

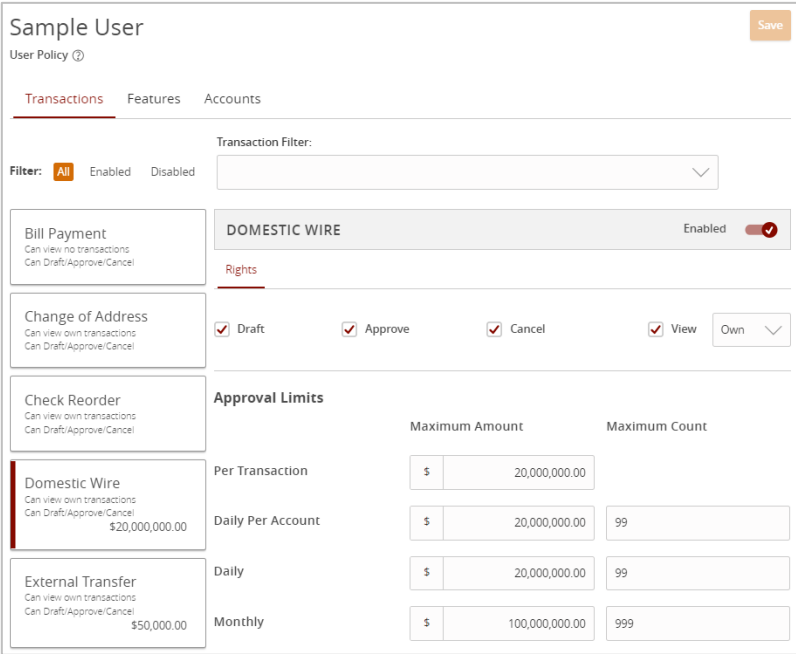


Questions? Call our customer support.

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

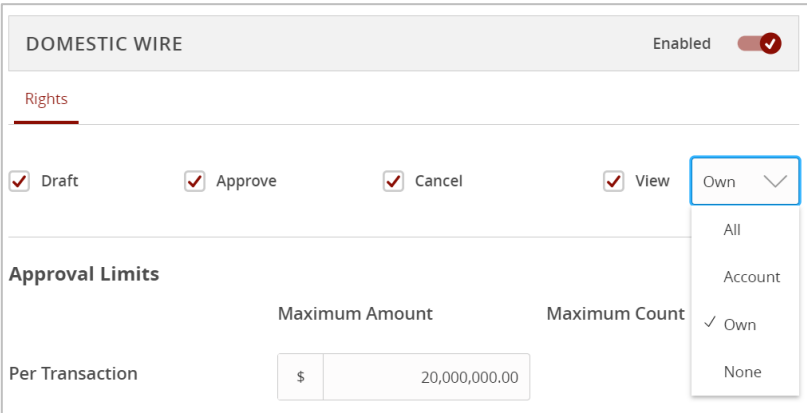
Revised 10/21/2024

6. Click on each Transaction Type to configure the user's entitlements and limits.



7. On the 'Rights' tab, select the user's transaction rights by toggling the checkmarks on/off.

8. Click on the drop-down menu to adjust the view rights.
- All** - Can view transactions initiated by any online banking user within the company.
 - Own** - Can only view the user's own transactions.
 - Account** - Can view transactions to or from entitled accounts.
 - None** - Cannot view any transactions.



9. In the 'Approval Limits' section, enter the user's transaction dollar and count limits.

NOTE: Repeat steps 5- 8 for each transaction type.

	Maximum Amount	Maximum Count
Per Transaction	\$ 20,000,000.00	
Daily Per Account	\$ 20,000,000.00	2
Daily	\$ 20,000,000.00	5
Monthly	\$ 100,000,000.00	25

10. Click on the 'Features' tab.

11. On the 'Features' tab, select the appropriate non-transactional features.

12. On the 'Accounts' tab, designate the user's account rights.

Transactions **Features** Accounts

FEATURES ?

SEARCH

RIGHTS

- Access to all payment templates
- Allow one-time recipients
- Can view all recipients
- Manage Recipients
- Manage Users
- Statement Image
- View Wire Activity

13. Click the 'Save' button in the top right corner of the screen.

Maintaining Existing Users

1. Click the pencil icon to edit the existing user.

User Management

SEARCH USERS Add User

User	Email Address	Last login	
Sample User	sample@abc.com		
User Demo	anevare@veritexbank.com	20 minutes ago	

2. Click on 'Assign Rights' towards the bottom right corner of the screen.

User Details

Status: Active Edit Status

PERSONAL DETAILS

First Name: Sample	Last Name: User	Email Address: sample@abc.com
Phone Country: United States	Phone: (512)555-1234	

USER LOGINS

Login Name	Channel	Status	Last Logon	Actions
sampleuser	Internet	Password Change Required		

Cancel Delete Assign Rights