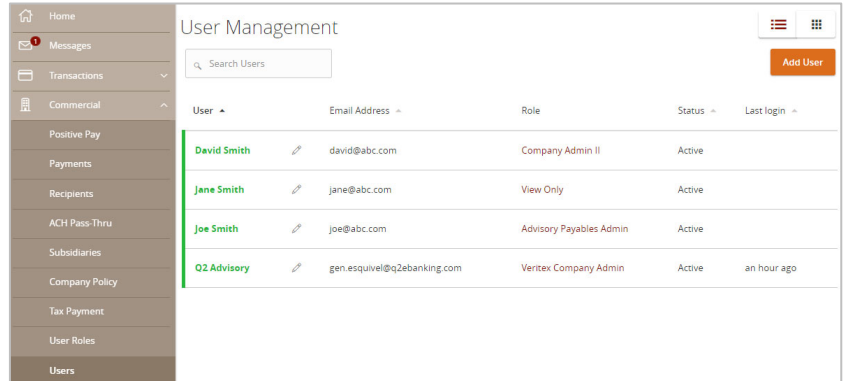


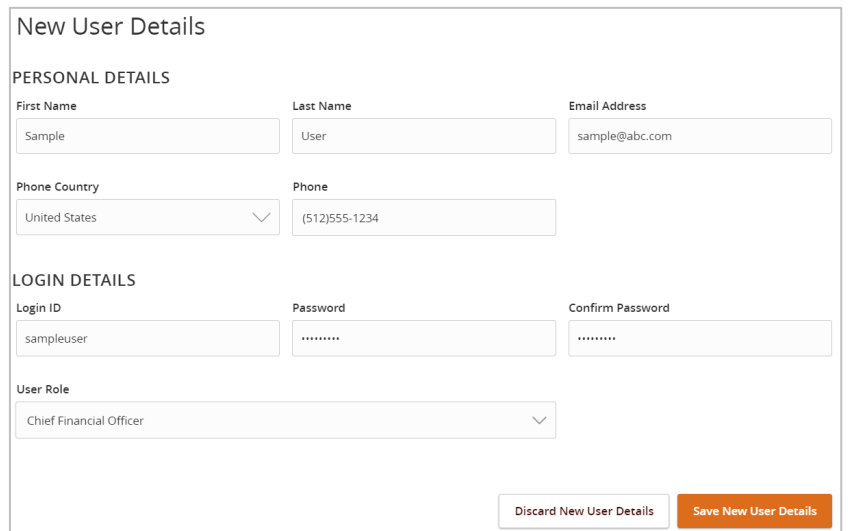
## Creating New Online Users

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 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, Last Name, Email Address, Phone Country, and Phone. The 'LOGIN DETAILS' section includes fields for Login ID, Password, and Confirm Password. A 'User Role' dropdown menu is also present. At the bottom right, there are buttons for '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 (Treasury Support: 972-349-6195)

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

User Management

Search Users Add User

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

- 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.

User Details

Status: Active Edit Status

PERSONAL DETAILS

First Name	Last Name	Email Address
Bob	Jones	bob@abc.com
Phone Country	Phone	
United States	(812)566-6666	

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.

Status: Active

Cancel Deactivate User

Status: Inactive

Cancel Activate User

4. Click the ellipses (vertical dots) to unlock an online user.

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

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

USER ROLE Manage User Roles

Current Role:  Update Role

USER LOGINS

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

Cancel Delete

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