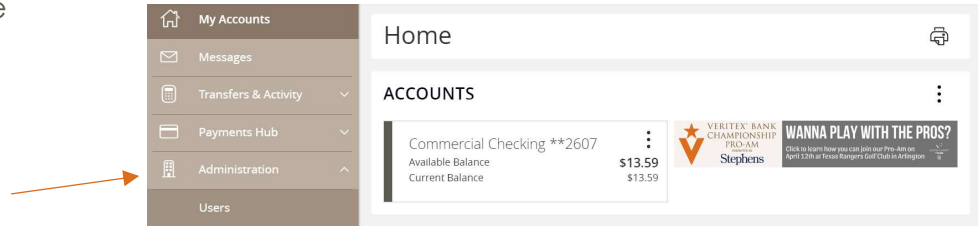


Creating Online Users

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



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

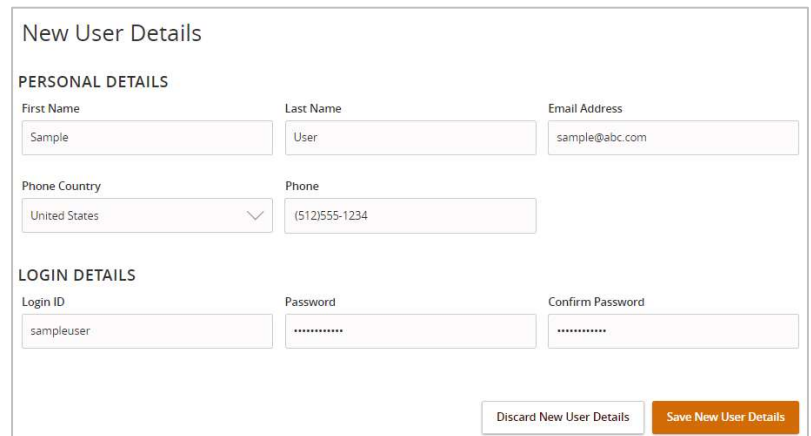


3. Enter the required fields for the new user.

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.



New User Details

PERSONAL DETAILS

First Name: Sample, Last Name: User, Email Address: sample@abc.com

Phone Country: United States, Phone: (512)555-1234

LOGIN DETAILS

Login ID: sampleuser, Password: [masked], Confirm Password: [masked]

Discard New User Details | Save New User Details

Questions? Call our customer support.

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

Revised 10/21/2023

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

Sample User Save

User Policy [?](#)

Transactions Features Accounts

Transaction Filter:

Filter: **All** Enabled Disabled

Bill Payment
Can view no transactions
Can Draft/Approve/Cancel

Change of Address
Can view own transactions
Can Draft/Approve/Cancel

Check Reorder
Can view own transactions
Can Draft/Approve/Cancel

Domestic Wire
Can view own transactions
Can Draft/Approve/Cancel
\$20,000,000.00

External Transfer
Can view own transactions
Can Draft/Approve/Cancel
\$50,000.00

DOMESTIC WIRE Enabled ☒

Rights

☒ Draft ☒ Approve ☒ Cancel ☒ View **Own**

Approval Limits

	Maximum Amount	Maximum Count
Per Transaction	\$ 20,000,000.00	
Daily Per Account	\$ 20,000,000.00	99
Daily	\$ 20,000,000.00	99
Monthly	\$ 100,000,000.00	999

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

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

DOMESTIC WIRE Enabled ☒

Rights

☒ Draft ☒ Approve ☒ Cancel ☒ View **Own**

Approval Limits

	Maximum Amount	Maximum Count
Per Transaction	\$ 20,000,000.00	

Dropdown menu options: All, Account, **Own** (selected), None

Questions? Call our customer support.

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

Revised 10/21/2023

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

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

Approval Limits		
	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

9. Click on the 'Features' tab.

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

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

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

Transactions
Features
Accounts

FEATURES ?

RIGHTS

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

Maintaining Existing Users

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

User Management

Search Users

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		

Questions? Call our customer support.

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

Revised 10/21/2023