



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.

	User Mana	agement				
	ober mane	Serrielle				
	Search Users					Add User
	lless -	Presell Addresses of	0.1-		t and to also at	
	User ~	Email Address ~	Role	Status ~	Last login ~	
Administration ^	Adan Test	anevarez@veritexbank.com	Cory Kelly	Active	2 days ago	Ø
Users	Cory Kelly	ckelly@veritexbank.com	Cory Kelly	Awaiting Activation Approval	10 months ago	Ø
User Roles						

- 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.
- 6. For added security you will be prompted to enter a Secure Access Code or Symantec Token code (if applicable).

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.

New User Deta	ills	
PERSONAL DETAILS		
First Name	Last Name	Email Address
Sample	User	sample@abc.com
Phone Country	Phone	
United States	(512)555-1234	
LOGIN DETAILS		
	Dassword	Confirm Parsword
LOGIN DETAILS Login ID sampleuser	Password	Confirm Password
LOGIN DETAILS Login ID sampleuser User Role	Password	Confirm Password
LOGIN DETAILS Login ID sampleuser User Role Chief Financial Officer	Password	Confirm Password
LOGIN DETAILS Login ID sampleuser User Role Chief Financial Officer	Password	Confirm Password

Existing Online Users

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

Search Users				Add Us
User 🔶	Email Address 🗠	Role	Status 🛎	Last login 🔺
Billy Sample	billy@abc.com	Billy Sample	Inactive	0
Bob Jones	bob@abc.com	Bob Jones	Active	I
Bob Thomas	bob@abc.com	Bob Thomas	Active	Ø
Cory Smith	csmith@abc.com	Cory Smith	Active	Ø

Questions? Call our customer support. Phone: 833-VERITEX (833-837-4839) or 469-443-9912 (Treasury Support: 972-349-6195) Revised 10/21/2024

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

- 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.
- 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.

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

User Details					
Status					
Active Edit Status					
PERSONAL DETAILS					
First Name	Last Name	Email Address			
Bob	Jones	bob@abc.com			
Phone Country	Phone				
Lipited States	(812)566-6666				

ctive		
	Inactive	
Cancel Deactivate User	Cancel	Activate User

USER ROLE	Manage User Roles				
Controller Update Role		~			
USER LOGINS					
Login Name	Channel	Status	Last Logon		Actions
-bobjones123	Internet	Password Change Required			`₩ :
				Cancel	Delete