Managing commercial users

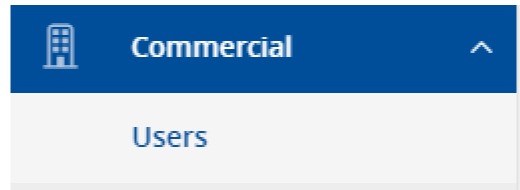
This section includes information and detailed instructions for adding, viewing, editing, and deleting users. Commercial users can create multiple users to share the workload of managing financial information.

Viewing existing users

The User Management page includes all users as cards in a grid or in a list.

To view existing users

1. In the navigation menu, click Commercial > Users. The User Management page appears with a list of users.

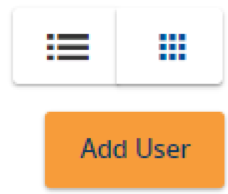


Adding a user

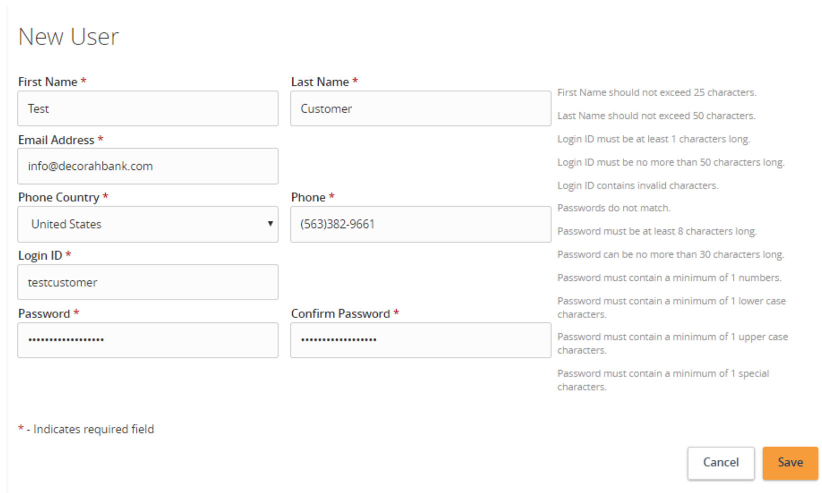
A user who has the Manage Users feature assigned can create other users on the User Management page.

To add a user

1. In the navigation menu, click Commercial > Users.



2. Click Add User. The New User page appears.
3. Do the following:
    a. In the First Name and Last Name fields, enter names.
    b. In the E-Mail Address field, enter a valid email address.
    c. In the Phone Country drop-down list, select the country.
    d. In the Phone field, enter a valid phone number.
    e. In the Login ID field, enter a login name.
    f. In the Password field, enter a default password, and re-enter it in the Confirm Password field.
    g. In the User Role drop-down list, select a role.
    h. Click Save.



4. Click Close. See Editing User Rights to add account access.

Editing user rights

A user who has the Manage Users feature assigned can edit any user's rights. Changes to user rights take effect the next time that the user logs in.

To edit user rights

1. In the navigation menu, click Commercial > Users.
2. Locate the user you want to edit by browsing or searching for the user. Click the edit user icon.

3. Verify the login name of the user in the Login Name field, and click Assign Rights.
4. Configure the user rights and limits for each Transaction Type, the account features, and the account access.
5. Click Save.

Configuring rights and limits for Transaction Types

A user who has the Manage Users feature assigned can edit user rights and limits for Transaction Types.
To view existing rights and limits for all Transaction Types On the View User page for a user, click Assign Rights. The Overview tab of the User Policy page appears with a list of Transaction Types.

To configure rights for Transaction Types on the User Policy page

1. In the navigation menu, click Commercial > Users.
2. Click the User you want to edit and select Assign Rights.
3. On the Overview tab of the User Policy page, click the icons for Draft, Approve, Cancel, and View to assign rights to a Transaction Type.
4. Click Save.
5. Click Close.

Configuring feature options

A user who has the Manage Users right assigned can edit user access to features. The features that appear depend on how we configure your account. Features that are turned on are highlighted and contain a check box in the row.

To configure feature options

1. On the View User page for a user, click Assign Rights. The Overview tab of the User Rights page appears.
2. Click Features.
3. Click features to assign to the user. These features may vary according to your configuration.
4. Click Save.
5. On the success message, click Close.

Configuring account access

A user who has the Manage Users right assigned can edit the access that other users have to accounts.

To configure account access

1. On the View User page for a user, click Assign Rights.
2. Click Accounts.
3. For each account, click the icon in each of the following columns to configure access:
    - View
    - Deposit
    - Withdraw
4. Click Save.
5. On the success message, click OK.

Deleting a user

When you delete a user, you do not delete any existing transactions that the user drafted or approved, including recurring transactions. Deletion is permanent, so use caution before deleting a user.

To delete a user

1. In the navigation menu, click Commercial > Users.
2. Locate the user that you want to delete. You can browse or search for the user. Click the edit user icon ( ).
3. Click Delete.
4. Click Yes to verify the deletion.
5. Click Close.