

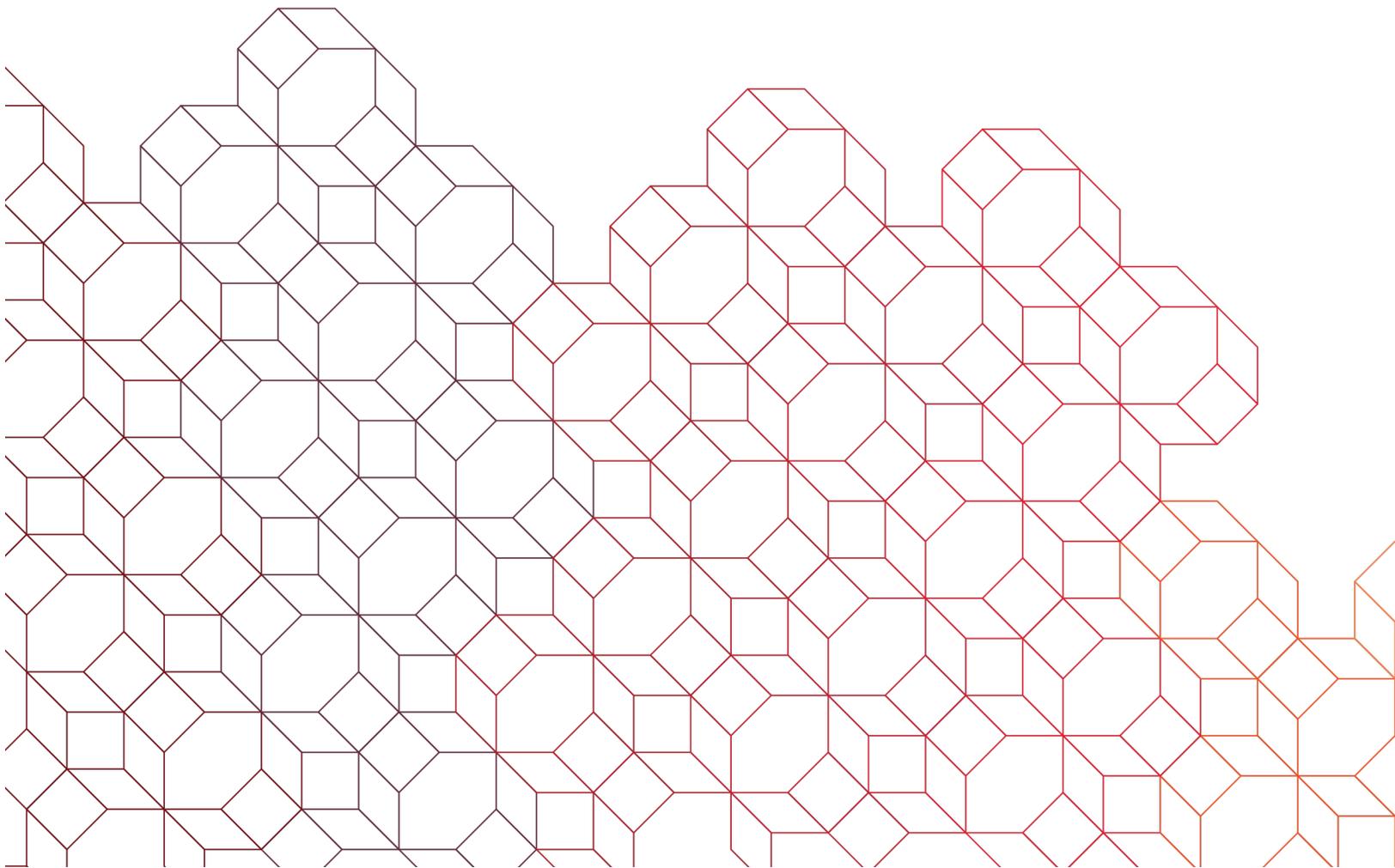


# Exchange

## User Administration – Copy User

This Quick Reference Guide will assist you with instruction on how to copy an existing Exchange user in order to create a new user. User Administration allows you to assign detailed permission and functionality to users at your company.

**Note:** Please be sure to review the individual guides for Business Bill Payment, ACHAlert Positive Pay and/or Payments and Reporting for permission instructions specific to those services.



First step, locate the current user for whom you would like to model the new one after.

**Find a User**

You can search based on the user's information. + Add a new user

Username  
tinatesterguide

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Name

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Email

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Clear all filters

Username ↓↑	Name ↓↑	UserType ↓↑	Email ↓↑	>
tinatesterguide1	Tina TesterGuide	COMPANY_ADMIN	email@email.com	

Home / User Administration / User Summary

## User Summary

tina trainer ⋮

Copy User

Delete user

Customer Name  
Biz1Cust017

- Click the arrow to the right of the user info in order to open their profile.
- Once the existing user's profile opens, click the "Ellipsis" next to the user's name and select "Copy User".

## Setup a user

### User Profile

#### User Info

Customer code  
**BIZ1CUST017**

Customer name  
**Biz1Cust017**

<input type="text" value="First name*"/>	<input type="text" value="Last name*"/>
<input type="text" value="Email*"/>	<input type="text" value="Phone*"/>
	US phone numbers only

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#### Profile

<input type="text" value="Username*"/>	<input type="text" value="User type*"/> User <span style="float: right;">▼</span>
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- Complete all required fields as it pertains to the new user.
- Then click "Next".

CancelNext

# Setup a user

## Edit their purchased products

Select the user's purchased products and services

Exchange Platform

Treasury

Back Next

- Click the arrows to the right in order to expand the products and view which services the new user will have based upon what was copied from the existing user.

## Edit their purchased products

Select the user's purchased products and services

Exchange Platform

Alerts Additional configurations located under payments and reporting – if applicable

Treasury

Payments & Reporting Expand product section in order to make changes to this product on the following screen [Expand Payments & Reporting](#)

Statements

Back Next

- Review all permissions to ensure those are the correct permissions you want for the new user. Adjust permissions as needed.
- For Treasury product permissions, please refer to the respected user admin guide.
- When ready to complete user setup, click "Next" and "Done" to the message that will follow.

### Product Category Chart

<b>Exchange Platform</b>	Alerts Mobile	
<b>Treasury</b>	ACH Positive Pay Bill Payment Corporate Card Payments Payments & Reporting	Positive Pay Item Research Statements
<b>Wealth</b>	Unity Platform	