

Exchange

User Administration – General Navigation

This Quick Reference Guide will assist you, as Exchange administrators in providing general navigation of Exchange User Administration and what you can see. User Administration also allows you to create and modify company users as well as assign detailed permissions and functionality.

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.

To create or modify a User, from the Administration menu, select "User Administration".



The User Administration landing page displays all users setup under your company.

- You can view current user permissions by clicking the arrow to the right of the user information.
- You may also search for a user by Username, Name or Email.
- To create a user, click the "Add a new user" link. **Note:** Copy user is also an available function.

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User Administration

Find	а	User	
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You can search based on the user's information.					+ Add a new t	user
Username	Username	Name	UserType	Email		
	CC1ADMIN4	CC1ADMIN4 CC1ADMIN41	COMPANY_ADMIN	a8i0c4	.com	>
Name	C2C1ADMIN10	C2C1ADMIN10 C2C1ADMIN10	COMPANY_ADMIN	a8i0c4	.com	>
Email	CC1ADMIN2	CC1ADMIN2 CC1ADMIN2	COMPANY_ADMIN	a8i0c4	.com	>
	CC1ADMIN3	CC1ADMIN3 CC1ADMIN3	COMPANY_ADMIN	a8i0c4	.com	>
	CC1ADMIN10	CC1ADMIN10 CC1ADMIN10	COMPANY_ADMIN	a8i0c4	.com	>
	CC1ADMIN1	CC1ADMIN1 CC1ADMIN1	COMPANY_ADMIN	a8i0c4	.com	>
	C2C1USER9	C2C1USER9 C2C1USER9	COMPANY_USER	a8i0c4	.com	>

TMMSally A		Under the User Summary, the user's name is displayed. Beneath the user's name is their contact information, as well as their username and the customer code.			🗹 Edit User Info
Customer Name CorpCust005 Custcode CORPCUST005	Phone 5555555555 User type Company User	Username TMMSally1	Email email@email.com		
Security ••• User activati Products and Services	on pending first login	"Security" displays the status the user is in. If the area to the right of the ellipsis is blank, the user is active.		🗹 Edit p	roducts and services
Exchange Platform Lending					× ×
Treasury Wealth View products and services >		"Products and Services" section lists a products in Exchange and are groupe These are not necessarily the ones yo elected. To see which ones the user click the arrow to the far right to expan	all the available ed into categories. our company has has permission to, not the list		~ ~

Products and Services	G Edit products and services				
Exchange Platform	~				
Lending	~				
Treasury	^				
ACH Positive Pay: Disabled					
ITMS RCC Pro: Disabled	When a product is expanded, a list of services is displayed. If the user has permissions, "Active"				
Payments & Reporting: Active	is indicated. If not, it will say	Disabled .			
Positive Pay Item Research: Disabled					
TradeAdvance: Active					
Statements: Active					
Wealth	~				

Products and Services	Z Edit produc	ets and services
Exchange Platform		~
Lending		~
Treasury		~
Wealth	If you would like to view the user's individual service	~
View products and services >	permissions, click "View products and services" link.	

After clicking "View products and services" from the prior screen, you are brought the Setup a user screen. Permissions cannot be altered here, although it does give the appearance.

The list here only provides those products for which your company has chosen, not necessarily what the user is permissioned.

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Setup a user	 Click the arrow to the right of each product, which will display list of services for that product. If the slider next to the service is blue, the user has permissio Greyed out, they do not have access. Click arrow next to the service to review detailed permissions 			
View their purchased products Select the user's purchased products and services	 that service. Be sure to review any notes identified next to services listed for additional instructions. Please visit the individual service User Administration Guides for details related to specific permissions. 			
Exchange Platform				
Alerts Additional configurations located under payments and reporting	- if applicable			
Treasury	^			
Payments & Reporting Expand product section in order to man	ke changes to this product on the following screen Expand Payments & Reporting			
Statements	Expand Statements 🗸			
TradeAdvance	Expand TradeAdvance 🗸			