



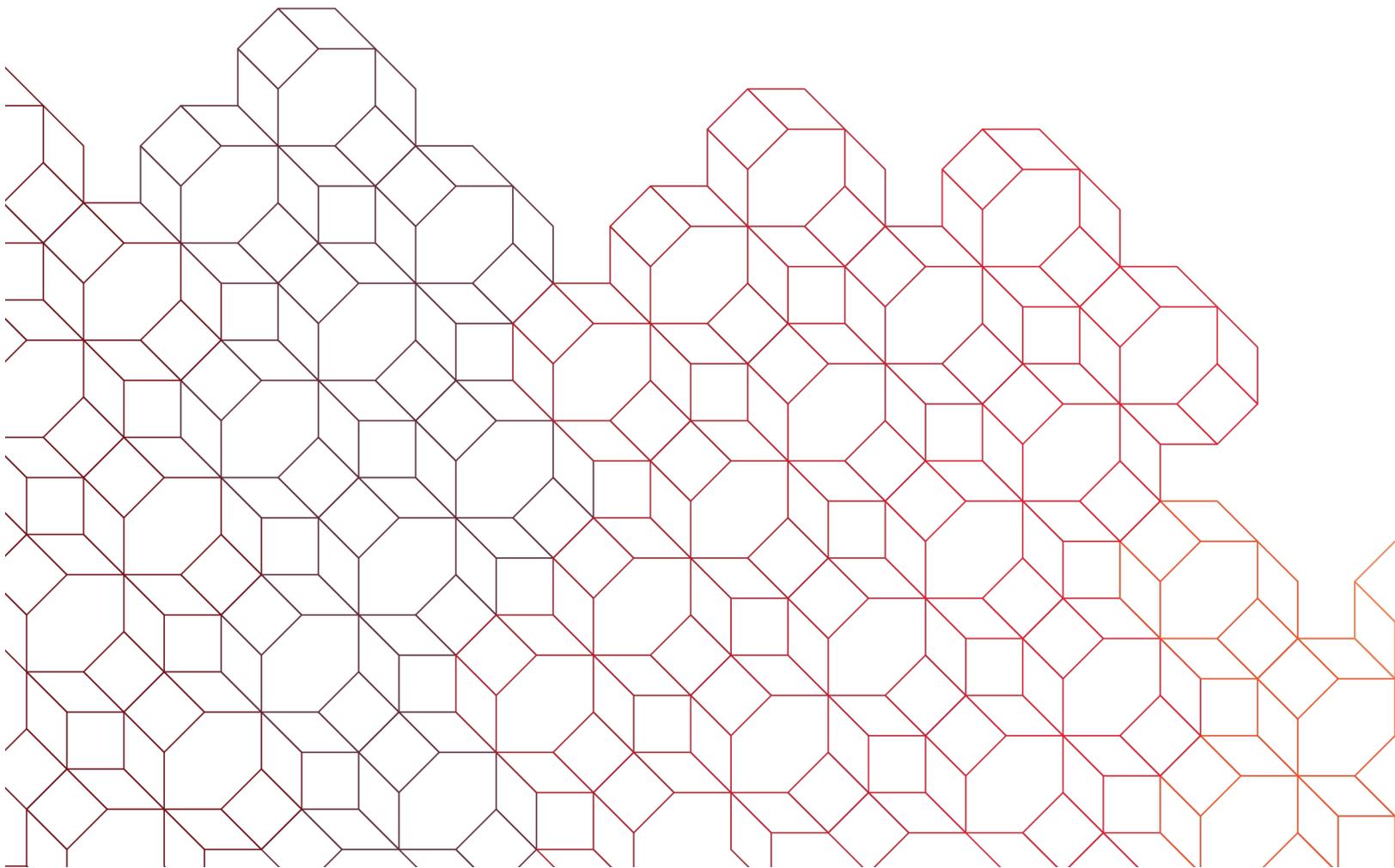
Exchange

User Administration – Modify User

This Quick Reference Guide will assist you with instruction for modifying users within Exchange. 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.

In order perform any type of user maintenance, you must locate the user under “User Administration”. Once you have selected the user, with their user profile on screen you are now able to perform necessary maintenance.



User Summary

TMMSally A ...

[Edit User Info](#)

Customer Name CorpCust005	Phone 5555555555	Username TMMSally1	Email email@email.com
Custcode CORPCUST005	User type Company User		

Security ... User activation pending first login...

Products and Services

[Edit products and services](#)

Exchange Platform

Lending

Treasury

Wealth

[View products and services >](#)

- You can edit the profile information by clicking the “Edit User Info” link. Which will take you to the screen to make changes.
- To edit user product/service permissions and settings, click “Edit products and services” link.

User Profile

User Info

Custcode: BIZ1CUST013 Customer name: Biz1Cust013

First name * test	Last name * test
Email * a8i0c4[redacted].com	Phone * [redacted]

Profile

Username *
testtest10

User type *
User

[Cancel](#) [Next](#)

When editing the user profile, only fields available for edit are First and Last name, Email, Phone and User type.

- Make necessary edits and once changes are made, click “Next”.
- You will be directed to “Edit their purchased products” screen, unless changes are needed, click “Next” on that screen.
- Changes are saved, click “Done” to the message that follows.

Note: These instructions show modifying “Exchange Platform” specific permissions. Please review the individual Treasury product user admin guides for those detailed permissions.

Edit their purchased products

Select the user's purchased products and services

Exchange Platform ^

Alerts Additional configurations located under payments and reporting – if applicable

Mobile

Treasury v

To make edits to Exchange Platform permissions:

- Click the arrow to the far right of “Exchange Platform” to expand.
- Edit permissions and settings as needed, following the same steps as a new user to finish the changes.

Refer to the admin related guides for other services.

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Product Category Chart		
Exchange Platform	Alerts Mobile	
Treasury	ACH Positive Pay Bill Payment Corporate Card Payments Payments & Reporting	Positive Pay Item Research Statements
Wealth	Unity Platform	