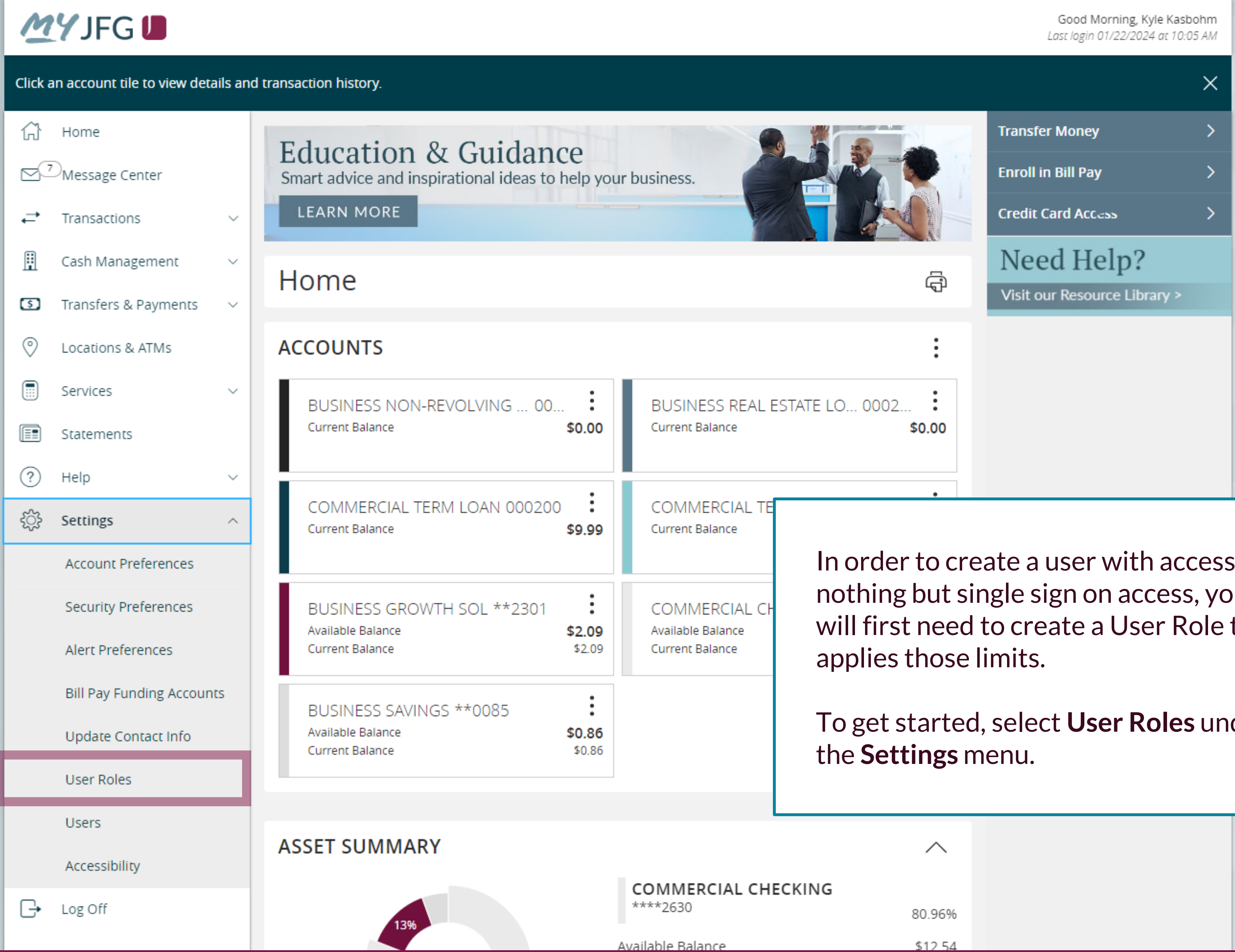
Creating Users in MyJFG for Single Sign On Entitlements Only

- Deposit Partner
- Positive Pay

JOHNSON FINANCIAL GROUP®

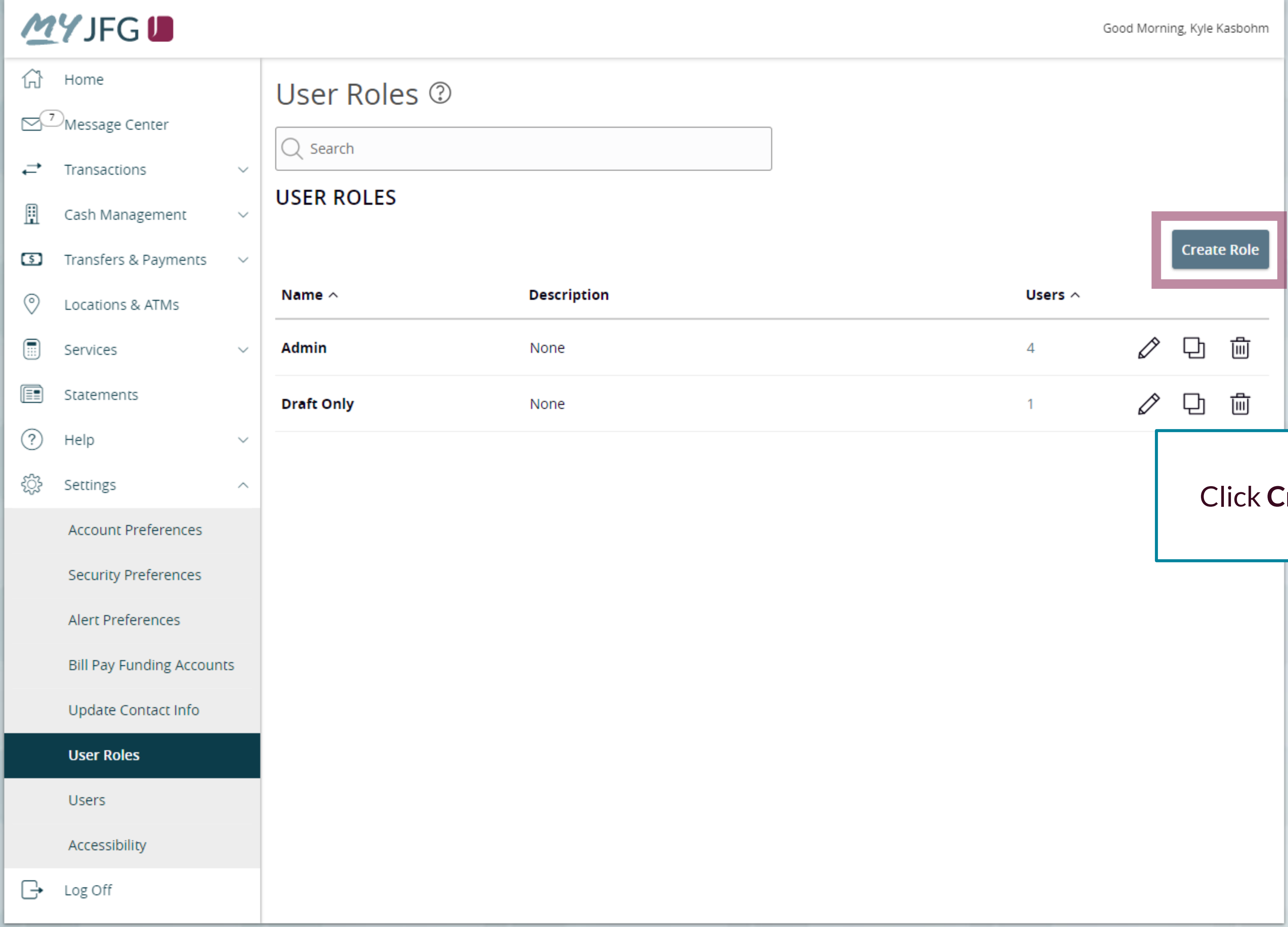
IMPORTANT

- Please note, any users for these Single Sign On applications will also need user profiles built within those systems. If at all possible, use the same username for new users in both MyJFG and the other system(s). When your user is created, please email myjfgbusiness@johnsonfinancialgroup.com with your company name and the username(s) created for both systems so they can link the profiles for the Single Sign On.

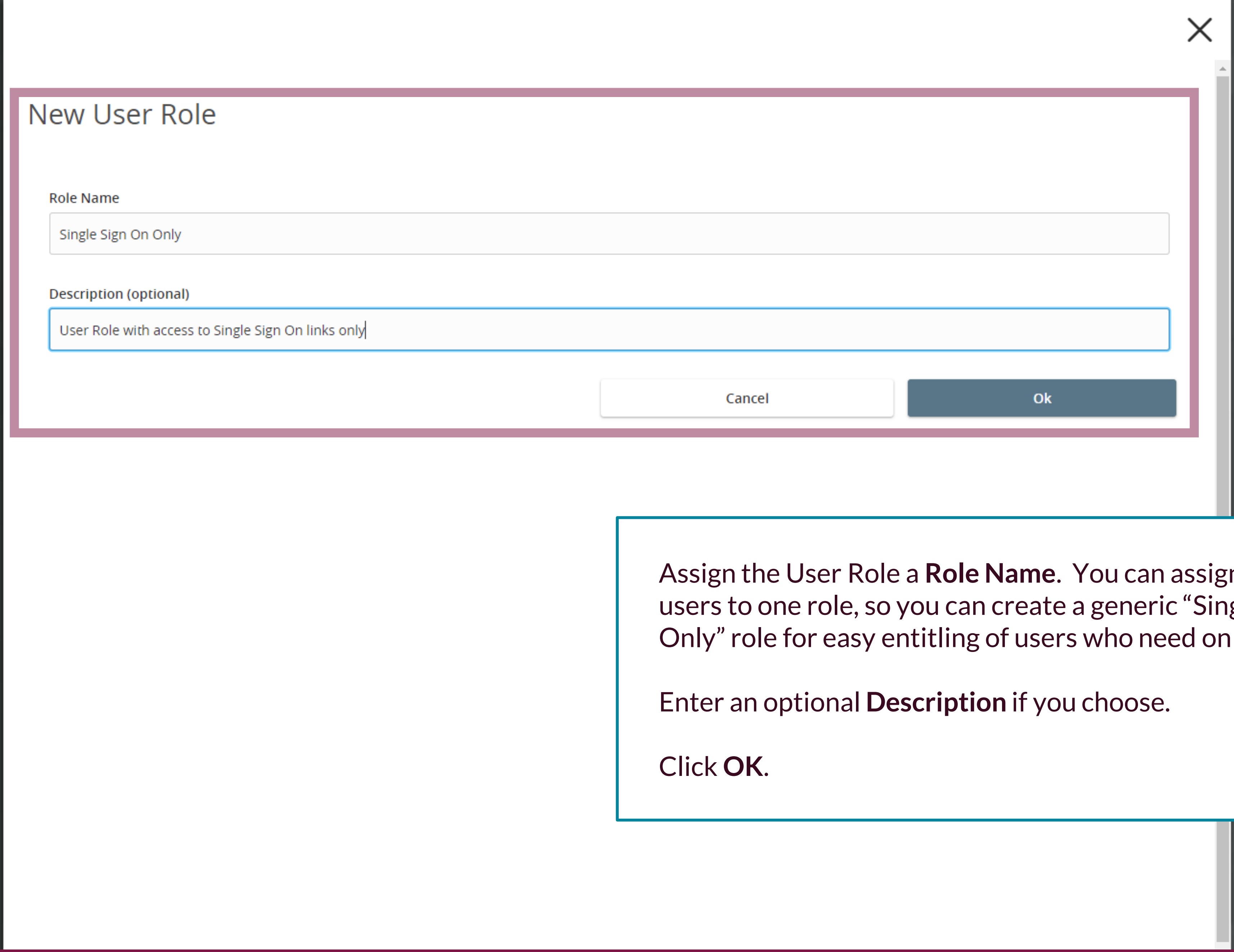


In order to create a user with access to nothing but single sign on access, you will first need to create a User Role that applies those limits.

To get started, select **User Roles** under the **Settings** menu.



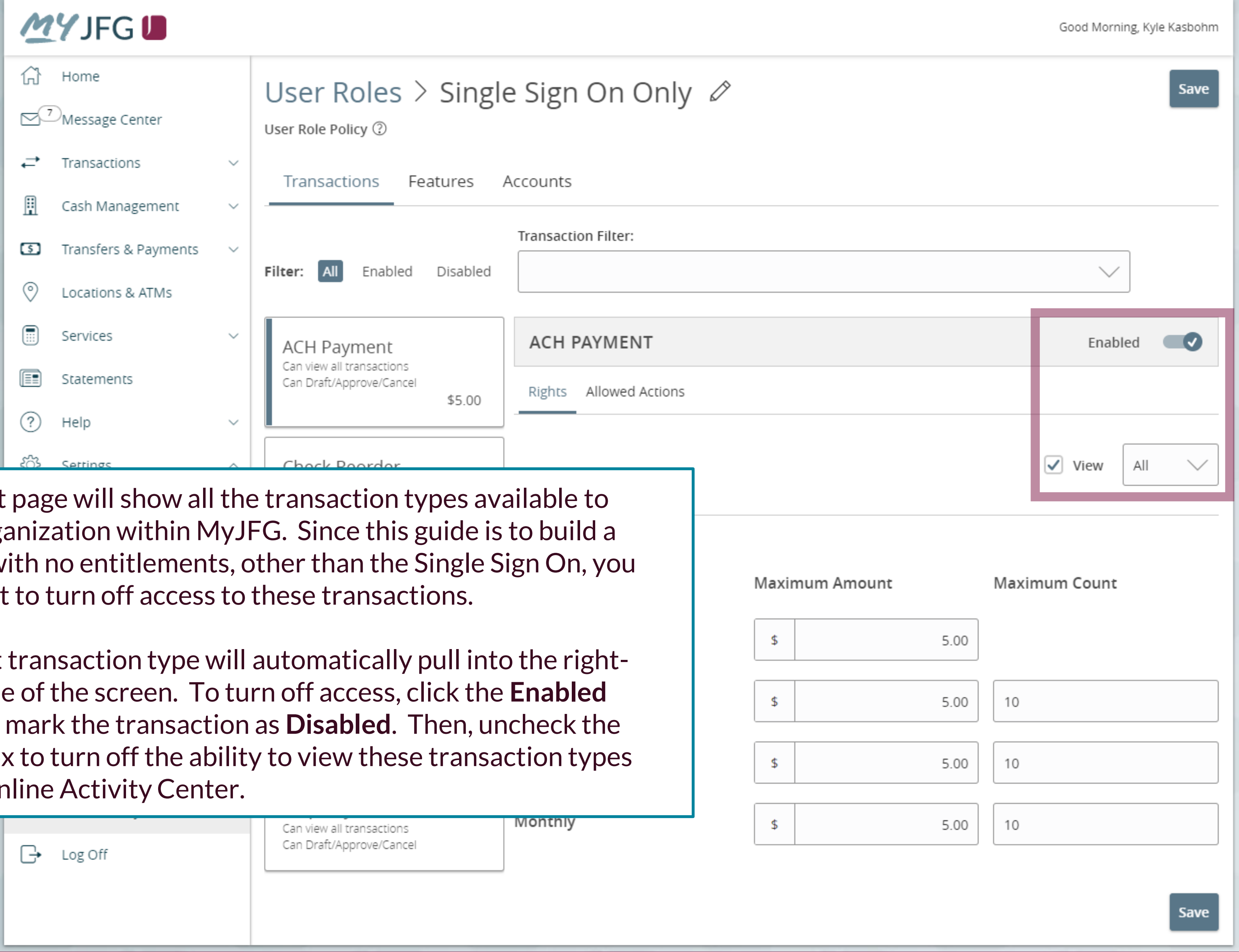
Click **Create Role**



Assign the User Role a **Role Name**. You can assign multiple users to one role, so you can create a generic “Single Sign On Only” role for easy entitling of users who need only this access.

Enter an optional **Description** if you choose.

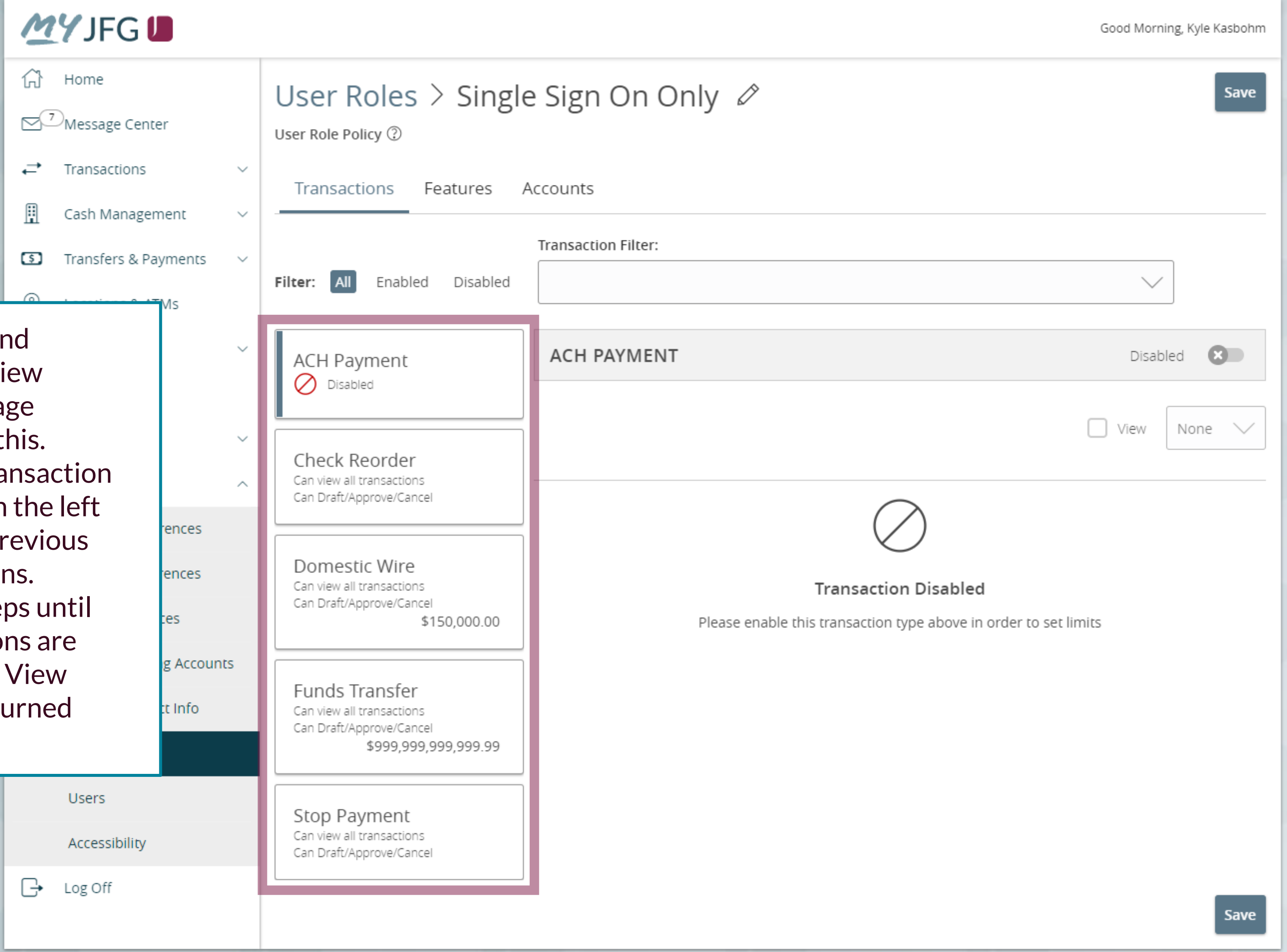
Click **OK**.

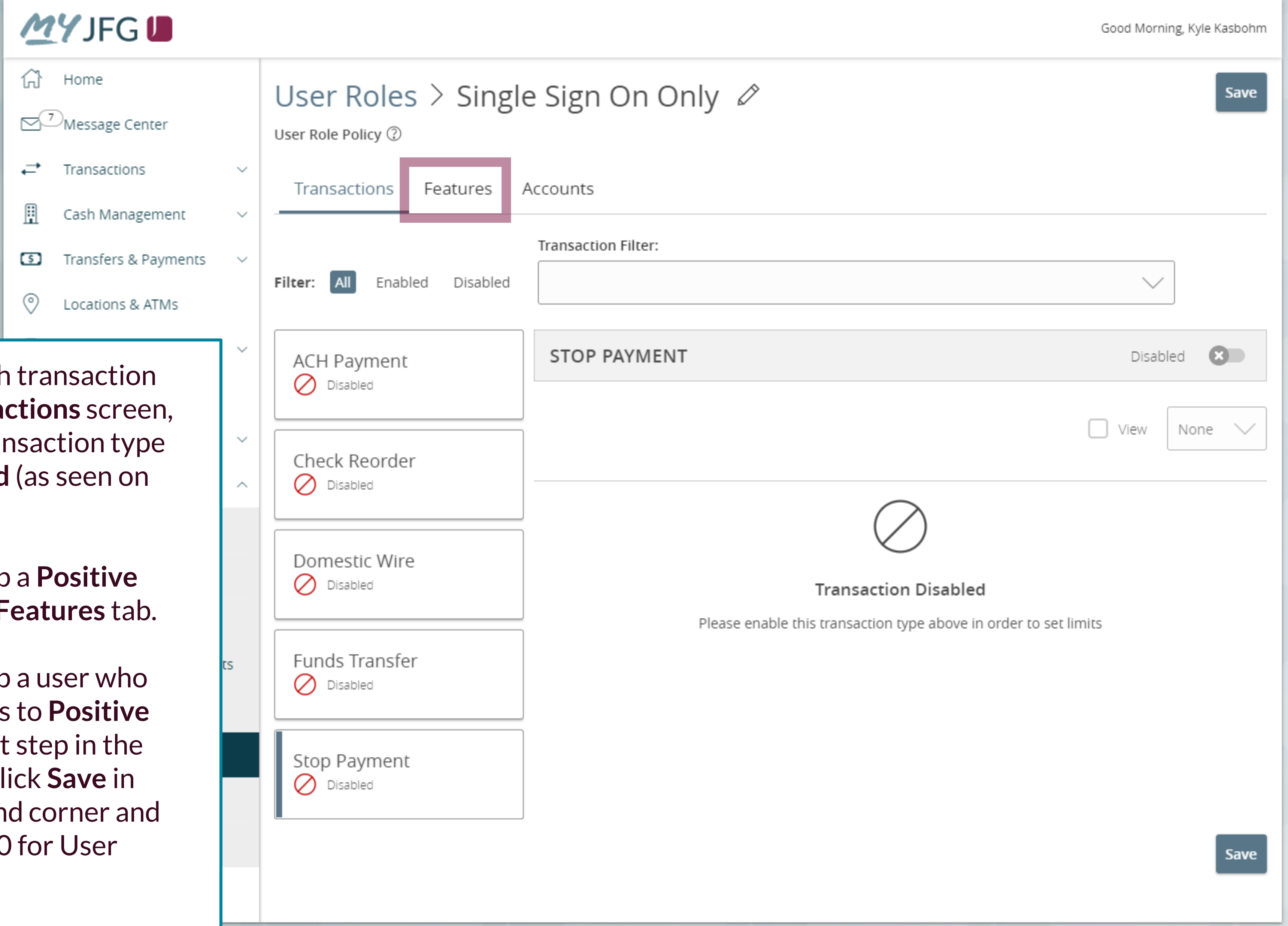


The next page will show all the transaction types available to your organization within MyJFG. Since this guide is to build a profile with no entitlements, other than the Single Sign On, you will want to turn off access to these transactions.

The first transaction type will automatically pull into the right-hand side of the screen. To turn off access, click the **Enabled** slider to mark the transaction as **Disabled**. Then, uncheck the **View** box to turn off the ability to view these transaction types in the Online Activity Center.

After disabling and turning off the View capability, the page should look like this. Click the next transaction type in the list on the left and repeat the previous page's instructions. Repeat these steps until all the transactions are disabled and the View capabilities are turned off.

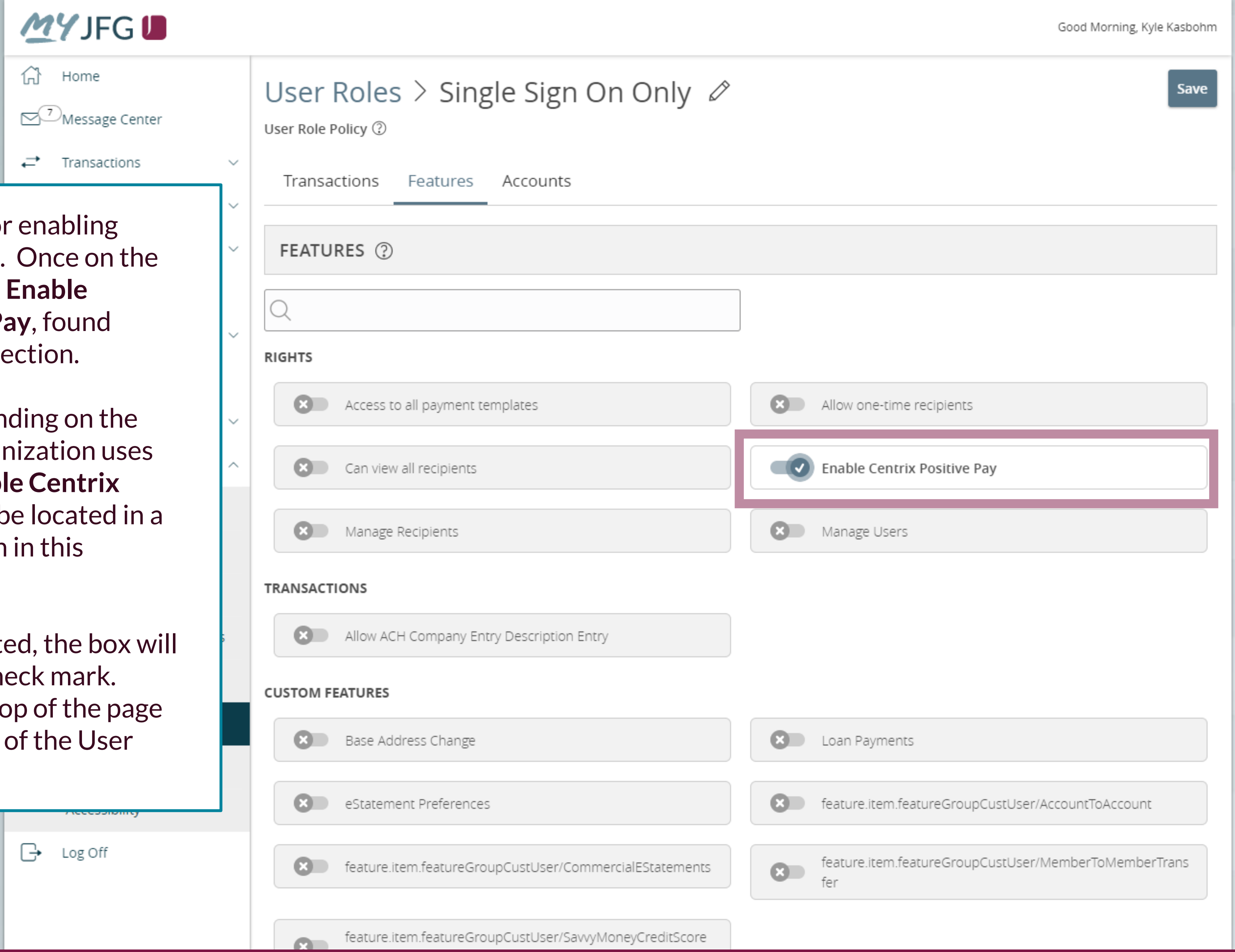




After updating each transaction type, on the **Transactions** screen, verify that each transaction type is listed as **Disabled** (as seen on this screen).

If you are setting up a **Positive Pay** user, click the **Features** tab.

If you are setting up a user who will not need access to **Positive Pay**, this is your last step in the User Role setup. Click **Save** in the upper right-hand corner and continue to Page 10 for User Setup instructions.

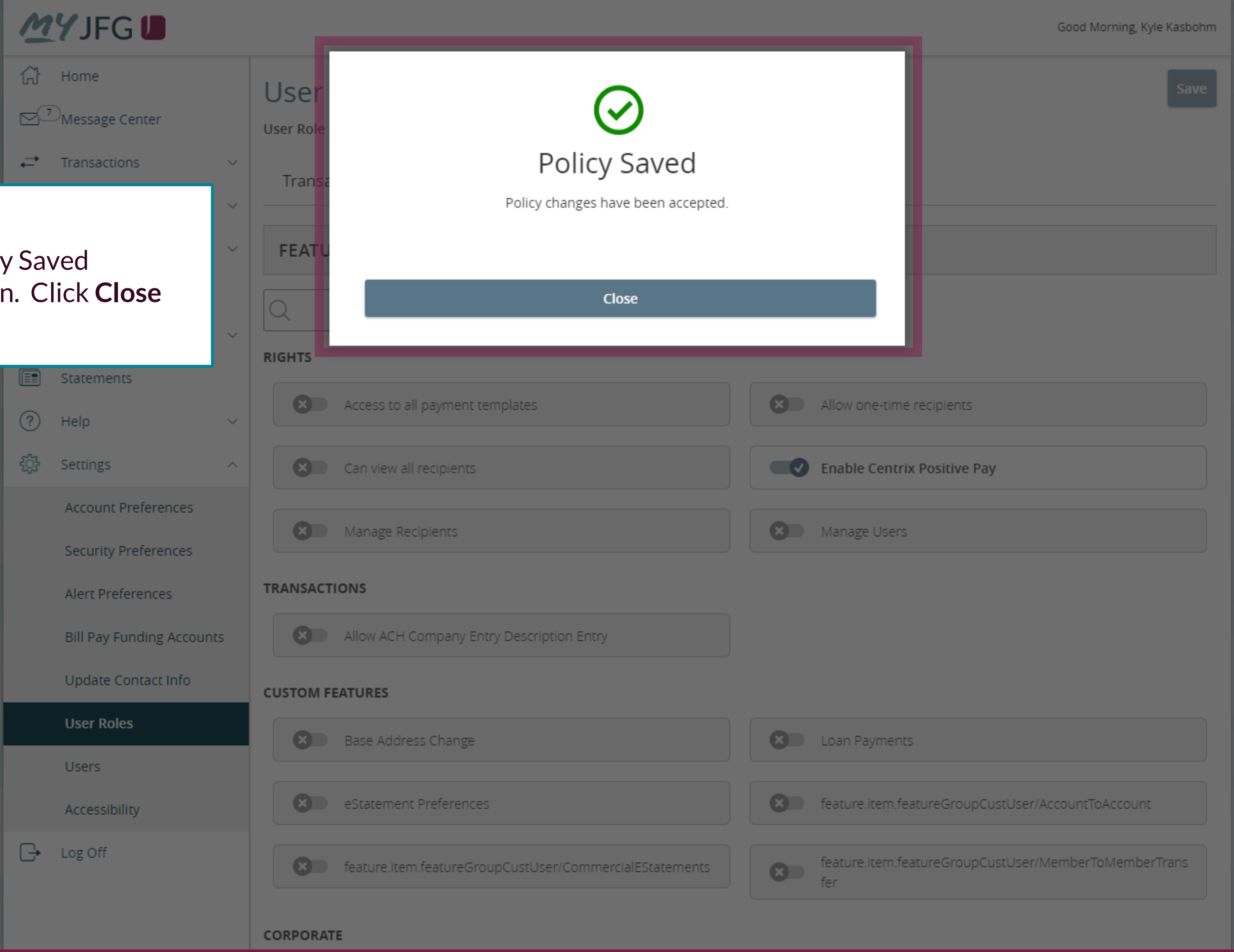


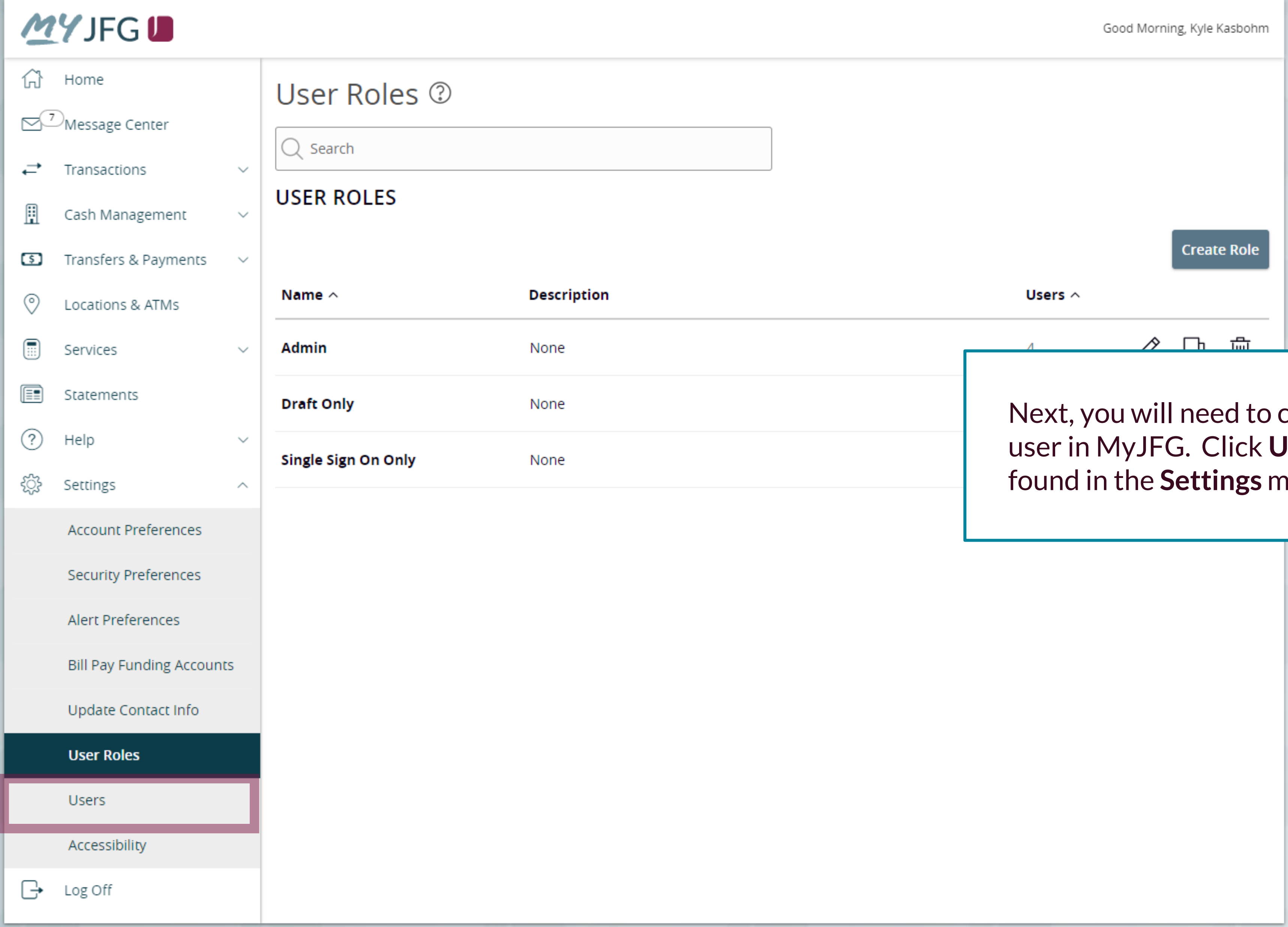
This step is only for enabling Positive Pay users. Once on the Features tab, click **Enable Centrix Positive Pay**, found under the **Rights** section.

Please note, depending on the services your organization uses with MyJFG, **Enable Centrix Positive Pay** may be located in a different spot than in this screenshot.

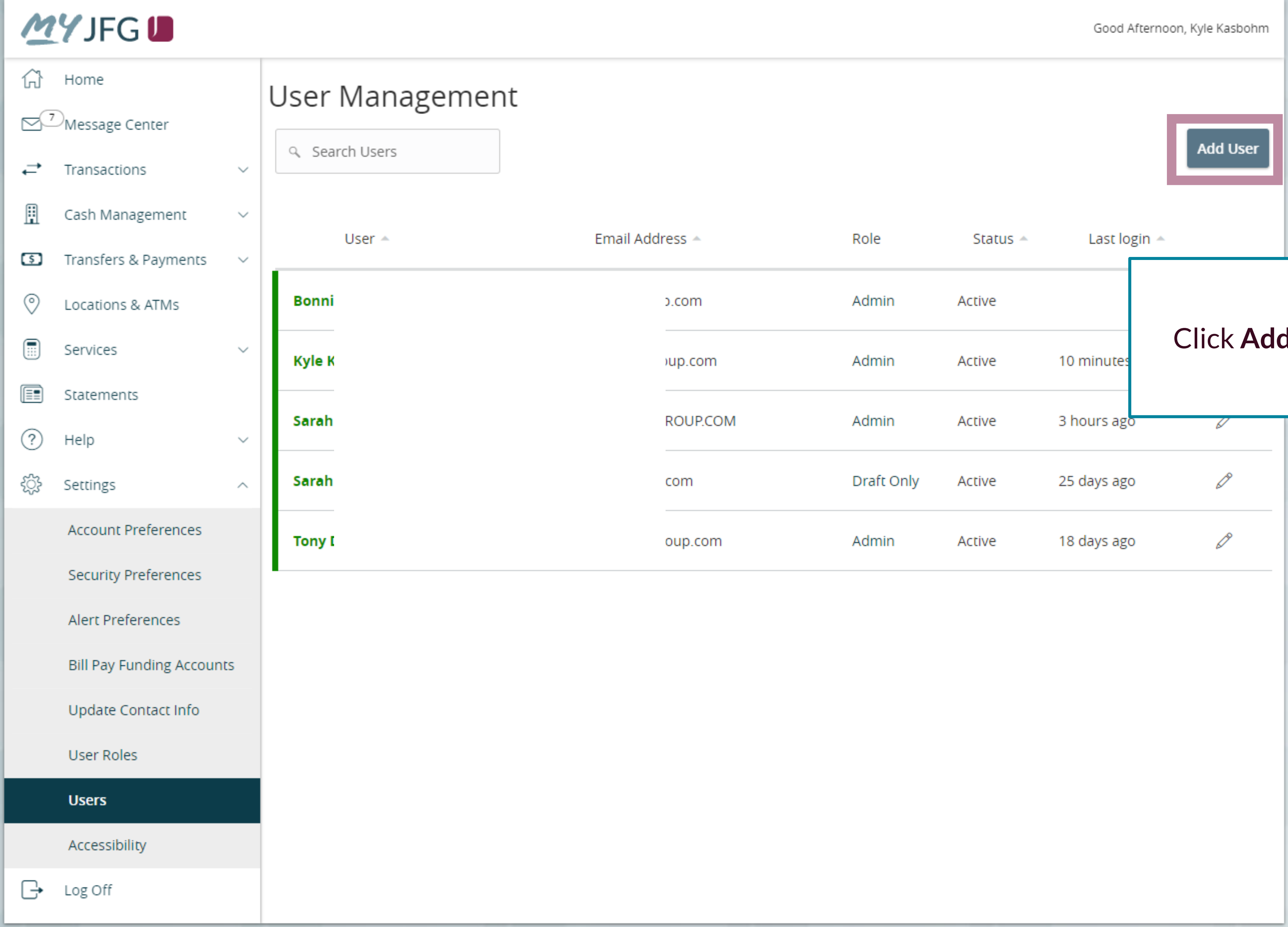
Once that is selected, the box will turn blue with a check mark. Click **Save** at the top of the page to complete setup of the User Role.

You will see a Policy Saved confirmation screen. Click **Close**

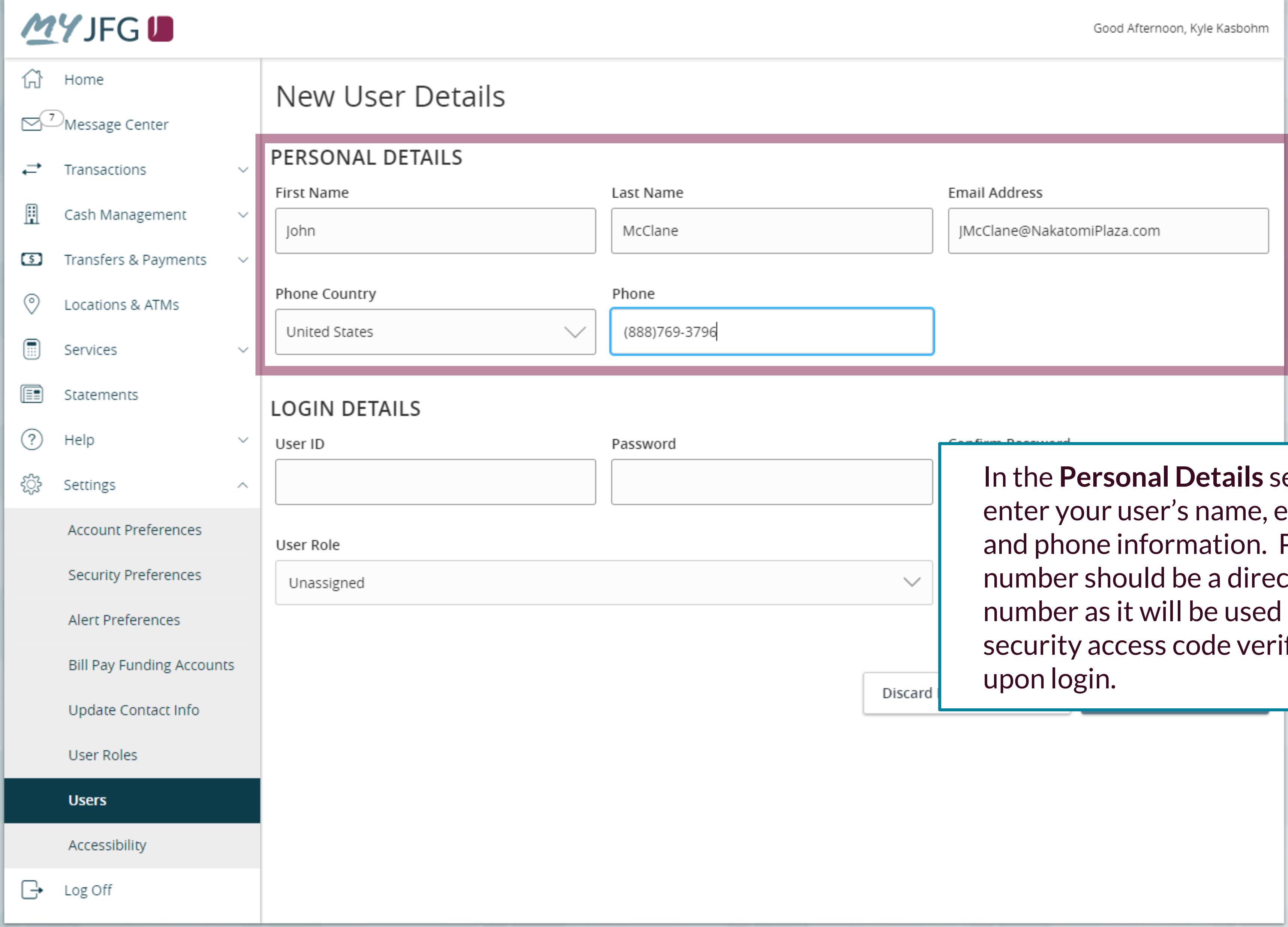




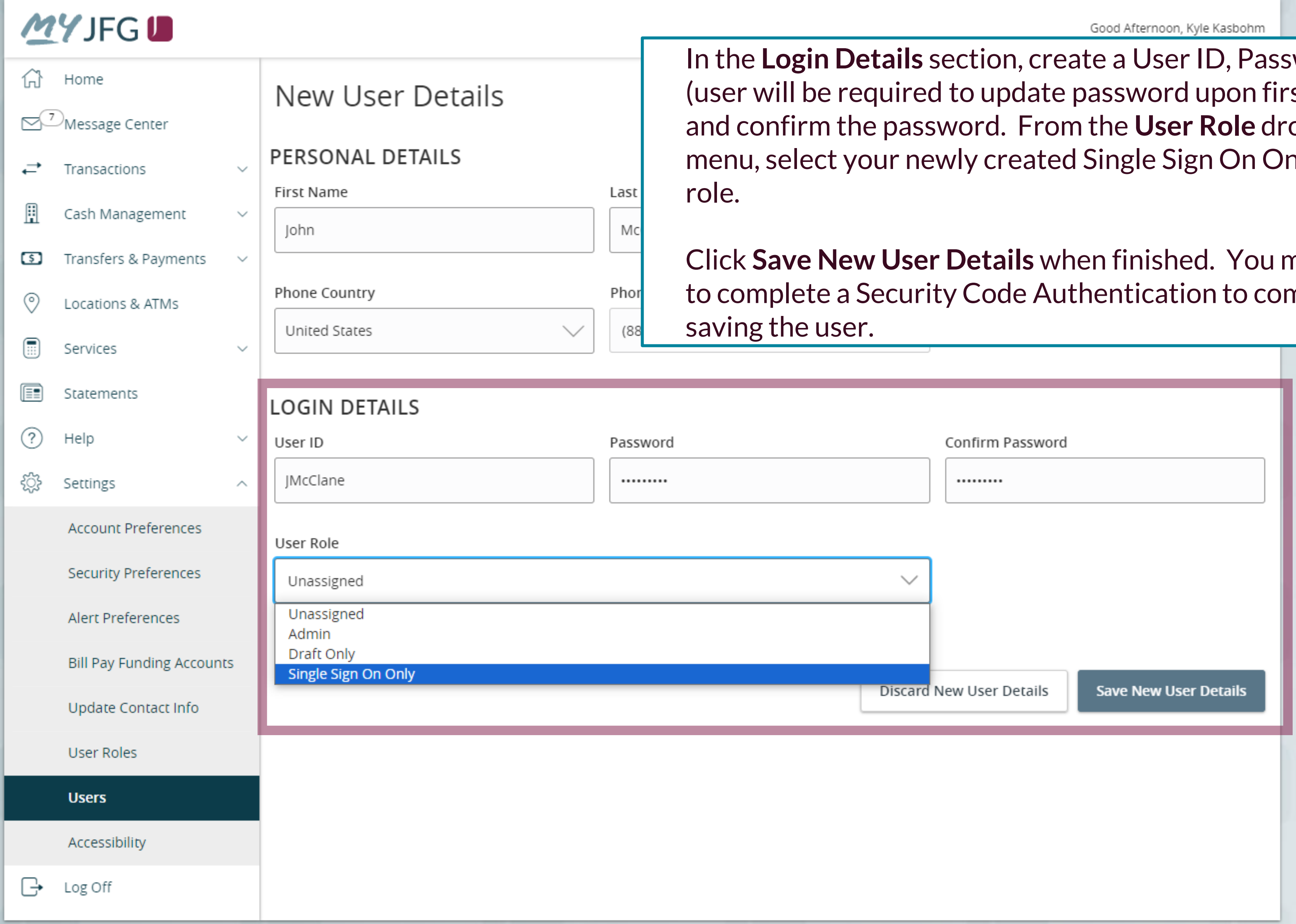
Next, you will need to create the user in MyJFG. Click **Users** found in the **Settings** menu.



Click **Add User**

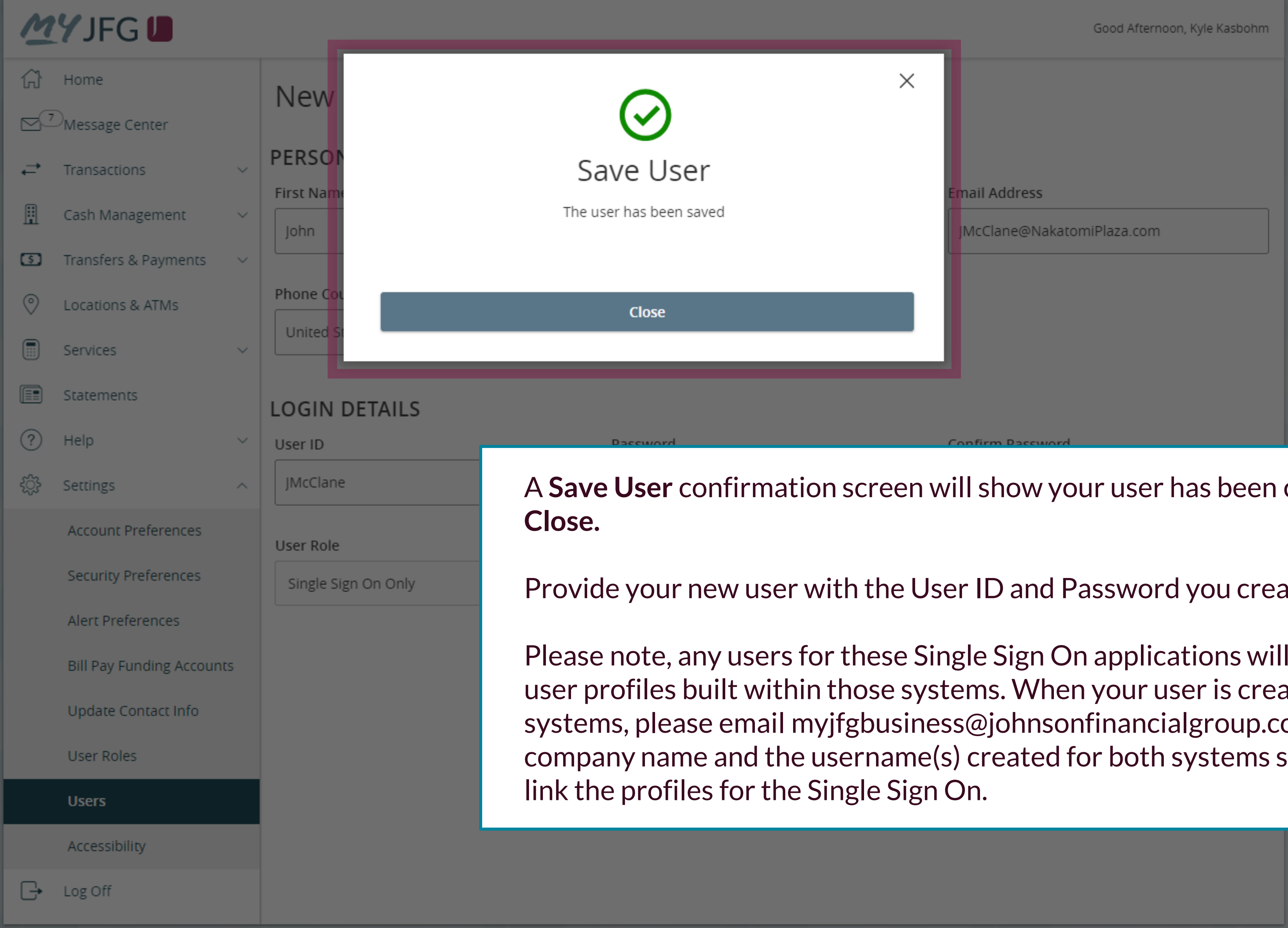


In the **Personal Details** section, enter your user's name, email, and phone information. Phone number should be a direct phone number as it will be used for security access code verification upon login.



In the **Login Details** section, create a User ID, Password (user will be required to update password upon first login), and confirm the password. From the **User Role** dropdown menu, select your newly created Single Sign On Only user role.

Click **Save New User Details** when finished. You may need to complete a Security Code Authentication to complete saving the user.



A **Save User** confirmation screen will show your user has been created. Click **Close.**

Provide your new user with the User ID and Password you created.

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Thank You

Additional Resources and Support

For additional resources, including “how-to” guides, please visit our online Client Resources page at https://www.johnsonfinancialgroup.com/business/cash-management/client-resources/

If further support is needed, please call our Johnson Customer Support Center at 888.769.3796 (option 1, then option 2), send a message in the MyJFG Message Center to “MyJFG Business – Cash Mgmt Solutions” or by email at myjfgbusiness@johnsonfinancialgroup.com.