

# Creating Users in MyJFG for Single Sign On Entitlements Only

- Deposit Partner
- Positive Pay

# 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](mailto: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.



Click an account tile to view details and transaction history.

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## Home

### ACCOUNTS

BUSINESS NON-REVOLVING ... 00... Current Balance \$0.00	BUSINESS REAL ESTATE LO... 0002... Current Balance \$0.00
COMMERCIAL TERM LOAN 000200 Current Balance \$9.99	COMMERCIAL TE... Current Balance
BUSINESS GROWTH SOL **2301 Available Balance \$2.09 Current Balance \$2.09	COMMERCIAL CH... Available Balance Current Balance
BUSINESS SAVINGS **0085 Available Balance \$0.86 Current Balance \$0.86	

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.

### ASSET SUMMARY

13%	COMMERCIAL CHECKING ****2630 Available Balance \$12.54	80.96%
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## User Roles ?

### USER ROLES

Create Role

Name ^	Description	Users ^	
Admin	None	4	
Draft Only	None	1	

Click Create Role

✕

## New User Role

Role Name

Description (optional)

Cancel Ok

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.



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## User Roles &gt; Single Sign On Only

Save

User Role Policy

Transactions Features Accounts

Filter: All Enabled Disabled

Transaction Filter:

ACH Payment



Disabled

STOP PAYMENT

Disabled

 View

None

Check Reorder



Disabled

Domestic Wire



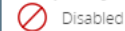
Disabled

Funds Transfer



Disabled

Stop Payment



Disabled



Transaction Disabled

Please enable this transaction type above in order to set limits

Save

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.



User Roles > Single Sign On Only 

Save

User Role Policy ?

Transactions Features Accounts

## FEATURES ?



## RIGHTS

 Access to all payment templates Allow one-time recipients Can view all recipients Enable Centrix Positive Pay Manage Recipients Manage Users

## TRANSACTIONS

 Allow ACH Company Entry Description Entry

## CUSTOM FEATURES

 Base Address Change Loan Payments eStatement Preferences feature.item.featureGroupCustUser/AccountToAccount feature.item.featureGroupCustUser/CommercialEStatements feature.item.featureGroupCustUser/MemberToMemberTransfer feature.item.featureGroupCustUser/SawvyMoneyCreditScore

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.

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Transa

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RIGHTS

 Access to all payment templates Allow one-time recipients Can view all recipients Enable Centrix Positive Pay Manage Recipients Manage Users

TRANSACTIONS

 Allow ACH Company Entry Description Entry

CUSTOM FEATURES

 Base Address Change Loan Payments eStatement Preferences feature.item.featureGroupCustUser/AccountToAccount feature.item.featureGroupCustUser/CommercialEStatements feature.item.featureGroupCustUser/MemberToMemberTransfer

CORPORATE



## Policy Saved

Policy changes have been accepted.

Close

Save

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

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## User Roles

### USER ROLES

Create Role

Name ^	Description	Users ^
Admin	None	
Draft Only	None	
Single Sign On Only	None	

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

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## User Management

Add User

User	Email Address	Role	Status	Last login	
Bonni	...com	Admin	Active		
Kyle K	...up.com	Admin	Active	10 minutes	
Sarah	ROUP.COM	Admin	Active	3 hours ago	
Sarah	com	Draft Only	Active	25 days ago	
Tony t	oup.com	Admin	Active	18 days ago	

Click Add User

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## New User Details

### PERSONAL DETAILS

<p>First Name</p> <input type="text" value="John"/>	<p>Last Name</p> <input type="text" value="McClane"/>	<p>Email Address</p> <input type="text" value="JMcClane@NakatomiPlaza.com"/>
<p>Phone Country</p> <input type="text" value="United States"/>	<p>Phone</p> <input type="text" value="(888)769-3796"/>	

### LOGIN DETAILS

<p>User ID</p> <input type="text"/>	<p>Password</p> <input type="password"/>
<p>User Role</p> <input type="text" value="Unassigned"/>	

Discard

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.

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## New User Details

### PERSONAL DETAILS

First Name  Last Name

Phone Country  Phone Number

### LOGIN DETAILS

User ID  Password  Confirm Password

User Role

Unassigned

---

Unassigned

Admin

Draft Only

Single Sign On Only

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.

**Save User**

The user has been saved

Close

**PERSONAL INFORMATION**

First Name  
John

Email Address  
JMcClane@NakatomiPlaza.com

Phone Country  
United States

**LOGIN DETAILS**

User ID  
JMcClane

User Role  
Single Sign On Only

Account Preferences

Security Preferences

Alert Preferences

Bill Pay Funding Accounts

Update Contact Info

User Roles

**Users**

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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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# Reminder

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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](mailto:myjfgbusiness@johnsonfinancialgroup.com).

[JohnsonFinancialGroup.com](https://www.johnsonfinancialgroup.com)

