

User Administration

To create, edit, or delete users within MyJFG



Click an account tile to view details and transaction history.

The screenshot displays the MYJFG user interface. On the left is a sidebar menu with the following items: Home, Message Center, Transactions, Cash Management, Transfers & Payments, Locations & ATMs, Services, Help, Settings, Account Preferences, Security Preferences, Alert Preferences, Text Enrollment, Users (highlighted with a red box), Accessibility, and Log Off. The main content area is titled 'Home' and features an 'ACCOUNTS' section. A card in this section shows 'BUSINESS LINE OF CREDIT 600001' with a current balance of \$0.00 and an available balance of \$25,000.00. On the right side of the main area, there are buttons for 'Transfer Money' and 'Credit Card Access'. A dark teal banner at the top of the main area contains the instruction 'Click an account tile to view details and transaction history.' and a close button.

To access your user administration functions, go to **Users** under the **Settings** menu.

- Home
- Message Center
- Transactions
- Cash Management
- Transfers & Payments
- Locations & ATMs
- Services
- Help
- Settings
- Account Preferences
- Security Preferences
- Alert Preferences
- Text Enrollment
- Users**
- Accessibility
- Log Off

User Management

Add User

User	Email Address	Last login
Bonnie	@johnsonfinancialgroup.com	
Danielle	@johnsonfinancialgroup.com	
Kyle	@johnsonfinancialgroup.com	a minute
O'mayra	@johnsonfinancialgroup.com	an hour
Sarah	@johnsonfinancialgroup.com	a month
Sarah	@johnsonfinancialgroup.com	2 hours
Tony	@johnsonfinancialgroup.com	2 days ago

Click on **Add User** to create a new user.

To edit or delete an existing user, skip to page 16.

New User Details

PERSONAL DETAILS

First Name

Rocky

Last Name

Balboa

Email Address

Rocky@Balboa.com

Phone Country

United States

Phone

(888)769-3796

LOGIN DETAILS

User ID

rbalboa

Password

.....

Confirm Password

.....

Discard New User Details

Save New User Details

Fill in Personal and Login Details for this user.

For the phone number, please use a direct phone number when possible. Extensions are not supported. This phone number will be used by the user when logging in to complete a Secure Access Verification Code.

When finished, click **Save New User Details**. Please note, after choosing to save the user, you may be required to complete a Secure Access Code verification via phone call or text message. If so, complete the on-screen prompts to continue.

The screenshot displays the MYJFG user management interface. A central dialog box titled "Save User" is open, featuring a green checkmark icon and the message "The user has been saved". A "Close" button is located at the bottom of the dialog. The background interface includes a sidebar with navigation options such as Home, Message Center, Transactions, Cash Management, Transfers & Payments, Locations & ATMs, Services, Help, and Settings. The main content area shows the "New User" form with fields for First Name (Rocky), Email Address (Rocky@Balboa.com), and Login Details (User ID: rbalboa, Password: masked, Confirm Password: masked). A "Discard New User Data" button is also visible.

After saving the user, you will be taken to a confirmation screen. Click **Close** to continue to the next page to set entitlements for this user.

- Home
- Message Center
- Transactions
- Cash Management
- Transfers & Payments
- Locations & ATMs
- Services
- Help
- Settings
- Log Off

Rocky Balboa

Save

User Policy ?

Transactions Features Accounts

Filter: All Enabled Disabled

Transaction Filter:

ACH Payment
 Can view own transactions
 Can Draft/Approve/Cancel
 \$999,999,999,999.99

ACH PAYMENT

Enabled

Rights

Draft Approve Cancel

Approval Limits

Maximum Amount

Per Transaction

\$ 999,999,999,999.99

Daily Per Account

\$ 999,999,999,999.99 999999999

Daily

\$ 999,999,999,999.99 999999999

Monthly

\$ 999,999,999,999.99 999999999

Bill Payment
 Can view own transactions
 Can Draft/Approve/Cancel

Check Reorder
 Can view own transactions
 Can Draft/Approve/Cancel

Domestic Wire
 Can view own transactions
 Can Draft/Approve/Cancel
 \$250,000.00

External Transfer
 Can view own transactions
 Can Draft/Approve/Cancel
 \$10,000.00

Funds Transfer
 Can view own transactions
 Can Draft/Approve/Cancel

On the first page of the entitlements options, you will see a list of the transaction types that your company has access to on the left-hand side of the screen. Click a transaction type to edit those entitlements.

After clicking a transaction type, on the right-hand side of the screen, you can update that user's entitlements for that transaction.

First, you can **Enable** or **Disable** the transaction for this user by clicking the slider bar on the right.

Bill Payment
 Can view own transactions
 Can Draft/Approve/Cancel

Check Reorder
 Can view own transactions
 Can Draft/Approve/Cancel

Domestic Wire
 Can view own transactions
 Can Draft/Approve/Cancel
 \$250,000.00

External Transfer
 Can view own transactions
 Can Draft/Approve/Cancel
 \$10,000.00

Funds Transfer
 Can view own transactions
 Can Draft/Approve/Cancel

Accounts

Transaction Filter:

Disabled

ACH PAYMENT

Enabled

Rights

Draft Approve Cancel View Own

Approval Limits

	Maximum Amount	Maximum Count
Per Transaction	\$ 999,999,999,999.99	
Daily Per Account	\$ 999,999,999,999.99	999999999
Daily	\$ 999,999,999,999.99	999999999
Monthly	\$ 999,999,999,999.99	999999999

- Home
- Message Center
- Transactions
- Cash Management

Rocky Balboa

Save

User Policy

- Transactions
- Features
- Accounts

Transaction Filter:

Enabled Disabled

ACH PAYMENT

Enabled

Rights

- Draft
- Approve
- Cancel
- View
- Own

Approval Limits

	Maximum Amount	Maximum Count
Per Transaction	\$ 999,999,999,999.99	
Daily Per Account	\$ 999,999,999,999.99	999999999
Daily	\$ 999,999,999,999.99	999999999
Monthly	\$ 999,999,999,999.99	999999999

If a transaction is enabled, you can select what actions a user can do for that transaction type:

Draft: Ability to create a transaction
Approve: Ability to approve that transaction
Cancel: Ability to cancel an unprocessed transaction.

Select the options that you want this user to have access to do.

Next, you can select the viewing capabilities for someone with this transaction enabled. Viewing capabilities dictates what the user can see in the Online Activity Center (found in the Transactions menu) for this transaction type.

The options for Viewing are:

All: User can see all transactions of this type in the Online Activity Center

Account: User can only see transactions of this type based on accounts they are assigned to.

Own: User can only see their own transactions of this type.

None: Users cannot see any transactions of this type, even their own.

While your organization may have specific needs for a different setting, we suggest for any user with a transaction enabled to select the **Account** option.

Kyle Balboa

Save

Policy ?

Transactions Features Accounts

Transaction Filter:

All Enabled Disabled

ACH Payment
Can view account transactions
Can Draft/Approve/Cancel
\$999,999,999,999.99

ACH PAYMENT Enabled

Rights

ACH Payment
Can view own transactions
Can Draft/Approve/Cancel

Draft Approve Cancel View

Account

- All
- Account
- Own
- None

Approval Limits

Maximum Amount

Maximum Count

Per Transaction

\$ 999,999,999,999.99

Daily Per Account

\$ 999,999,999,999.99

999999999

Daily

\$ 999,999,999,999.99

999999999

Monthly

\$ 999,999,999,999.99

999999999

ACH Transfer
Can view own transactions
Can Draft/Approve/Cancel

- Home
- Message Center
- Transactions
- Online Activity Center
- Statements

Rocky Balboa

Save

User Policy ?

Transactions **Features** Accounts

Filter: All Enabled Disabled

Transaction Filter:

ACH PAYMENT

Enabled

Rights

Draft Approve Cancel View

Account

Approval Limits

	Maximum Amount	Maximum Count
Per Transaction	\$ 999,999,999,999.99	
Daily Per Account	\$ 999,999,999,999.99	999999999
Daily	\$ 999,999,999,999.99	999999999
Monthly	\$ 999,999,999,999.99	999999999

Lastly, you can set approval limits for this user. You cannot set limits above what JFG has set for your organization. The first column is a maximum dollar amount, and the second column is maximum number of transactions. Set the limits for this user and transaction type.

When you are finished with the limits for this transaction type, repeat the process for each transaction type on the left.

When you are finished updating all the transactions, click the Features tab near the top of the page.

On the Features tab, you can set more general online banking functions for this user. Set the features you'd like for this user. Below are some general suggestions for the features based on services a user may need access to. However, please set features based on your organization's needs. When you are finished, click the **Accounts** tab to continue.

For any user who will be responsible for ACH, we typically suggest you give them access to any of the "recipient" features in the Rights section.

For a user who will be handling Reverse Positive Pay, you should turn on Enable Centrix Positive Pay in the Rights section.

Finally, Manage Users, found in the Rights section, allows a user to create/edit/delete users. Only assign that to someone you want to have that access.

User Policy ?

Transactions Features **Accounts**

FEATURES ?

🔍

RIGHTS

<input type="checkbox"/> Access to all payment templates	<input checked="" type="checkbox"/> Allow one-time recipients
<input type="checkbox"/> Can view all recipients	<input type="checkbox"/> Enable Centrix Positive Pay
<input type="checkbox"/> Manage Recipients	<input type="checkbox"/> Manage Users

TRANSACTIONS

<input checked="" type="checkbox"/> Allow ACH Company Entry Description Entry

CUSTOM FEATURES

<input checked="" type="checkbox"/> Loan Payments	<input checked="" type="checkbox"/> Watch
<input checked="" type="checkbox"/> eStatement Preferences	<input checked="" type="checkbox"/> feature.item.featureGroupCustUser/AccountToAccount
<input checked="" type="checkbox"/> feature.item.featureGroupCustUser/AddExternalAccount	<input checked="" type="checkbox"/> feature.item.featureGroupCustUser/MemberToMemberTransfer

E-STATEMENT

<input checked="" type="checkbox"/> Statements Access (Standard)
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The screenshot shows the MyJFG user management interface for a user named Rocky Balboa. The left sidebar contains navigation options: Home, Message Center (with a 10 message notification), Transactions, Cash Management, Transfers & Payments, Locations & ATMs, Services, Help, Settings, and Log Off. The main content area is titled 'Rocky Balboa' and includes a 'User Policy' section with tabs for Transactions, Features, and Accounts. The Accounts tab is active, displaying a table with columns for Number, Name, View, Deposit, and Withdraw. A 'Show unassigned accounts' link is highlighted with a red box, and a 'Save' button is visible at the bottom right of the main content area.

Home

Message Center ¹⁰

Transactions

Cash Management

Transfers & Payments

Locations & ATMs

Services

Help

Settings

Log Off

Rocky Balboa

User Policy ?

Transactions Features Accounts

ACCOUNTS ?

0 of 6 accounts shown

[Show unassigned accounts](#)

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
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Save

The accounts tab is where you can assign rights to this user for the accounts on your MyJFG profile. To get started, click **Show Unassigned Accounts**.

You will see a listing of the accounts available on your MyJFG profile. Assign rights to the user based on their needs. The different options are as follows:

View: Rights to see the account, balance information, and transaction information.

Deposit: Rights to deposit into that account via MyJFG transactions. For example, if this user needs to do internal transfers into this account, they will need Deposit rights.

Withdraw: Rights to withdraw from the account via MyJFG transactions. For example, if a user is responsible for creating ACH Payment transactions, they will need Withdraw rights to fund the ACH Transaction.

Click Save when you are finished.

Rocky Balboa

User Policy ?

Transactions Features **Accounts**

ACCOUNTS ?

6 of 6 accounts shown

[Hide unassigned accounts](#)

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
****1302	BUSINESS GROWTH CKG	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
****600001	BUSINESS LINE OF CREDIT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
****1303	BUSINESS GROWTH CKG	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
****1304	BUSINESS GROWTH CKG	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
XXXXXX4321	External Checking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
XXXXXX5464	External Checking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

-  Home
-  Message Center 10
-  Transactions v
-  Cash Management v
-  Transfers & Payments v
-  Locations & ATMs
-  Services v
-  Help v
-  Settings v
-  Log Off

Rock

User Polic

Transa

ACCO

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
****1302	BUSINESS GROWTH CKG	✓	✓	
****1303	BUSINESS GROWTH CKG	✓	✓	
****1304	BUSINESS GROWTH CKG	✓	⊘	
****600001	BUSINESS LINE OF CREDIT	✓	✓	
XXXXXX4321	External Checking	🔒	⊘	⊘
XXXXXX5464	External Checking	🔒	⊘	⊘



Policy Saved

Policy changes have been accepted.

Close

You will receive a confirmation that the updates have been saved for this user. Click **Close**.

- Home
- Message Center
- Transactions
- Cash Management
- Transfers & Payments
- Locations & ATMs
- Services
- Help
- Settings
- Users
- Accessibility
- Log Off

User Management

Add User

User	Email Address	Last login	
Bonnie	@johnsonfinancialgroup.com		
Danielle	@johnsonfinancialgroup.com		
Kyle	@johnsonfinancialgroup.com	a minute ago	
O'mayra	@johnsonfinancialgroup.com	an hour ago	
Sarah	@johnsonfinancialgroup.com	a month ago	
Sarah	@johnsonfinancialgroup.com	2 hours ago	
Tony	@johnsonfinancialgroup.com	2 days ago	

To edit or delete an existing user, click the **Pencil** icon for that user.

User Details

Status
Active
Edit Status

PERSONAL DETAILS

First Name	Last Name
Rocky	Balboa
Phone Country	Phone
United States	(888)769-3796

USER LOGINS

Login Name	Channel	Status
rbalboa	Internet	Password Change Required

Cancel Delete Assign Rights

You will be taken to the user details screen.

To delete a user, click the **Delete** button at the bottom of the screen. You will see a window asking you to confirm you'd like to delete the user. Click **Confirm** on that popup window to confirm deletion of the user.

To edit a user's status, to activate or deactivate the user, click the **Edit Status** option in the upper left-hand section of the page.

To edit a user's entitlements within their profile, click **Assign Rights** and go back to pages 6-14 to see information about updating user rights.

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.

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

