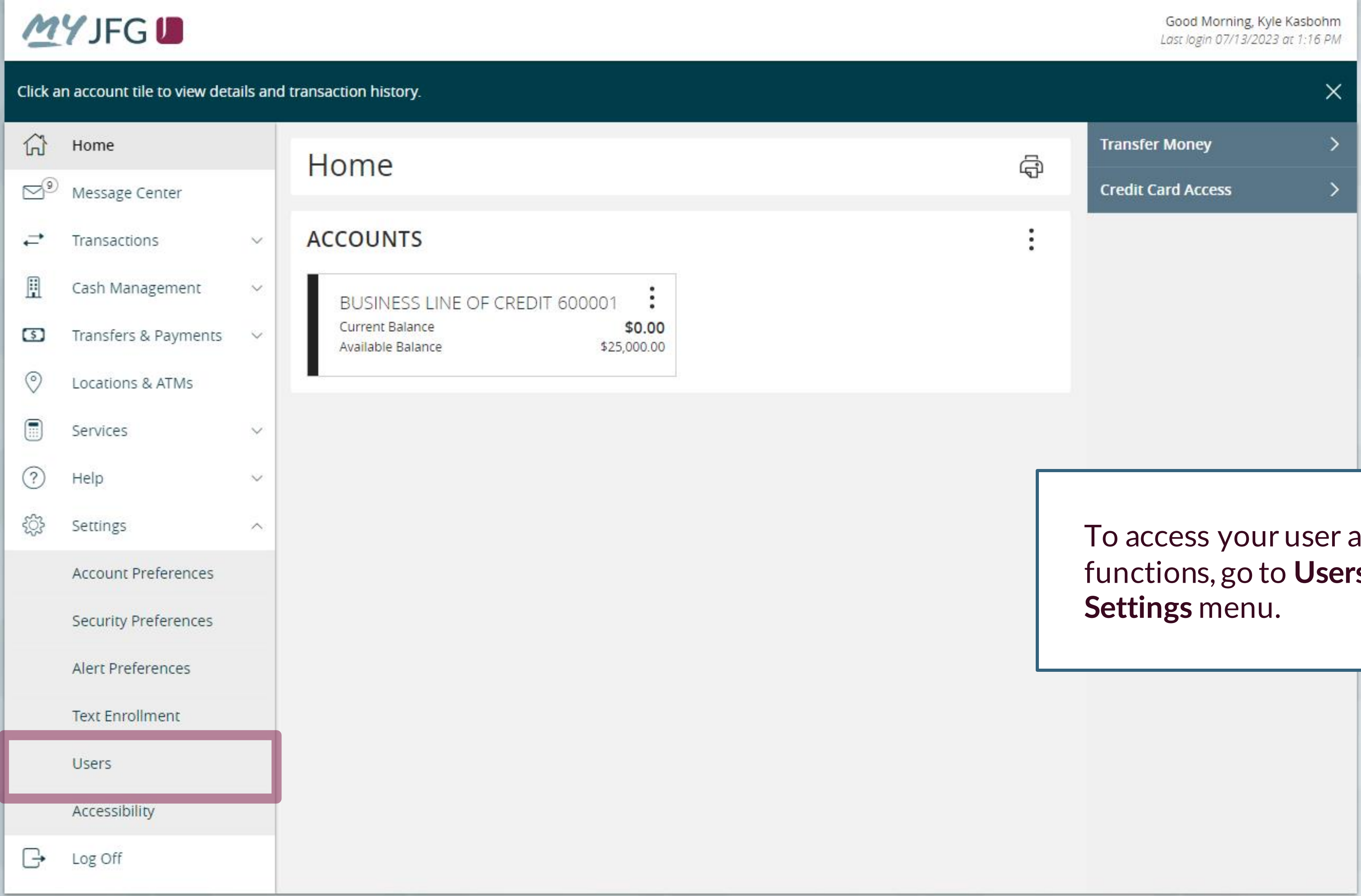
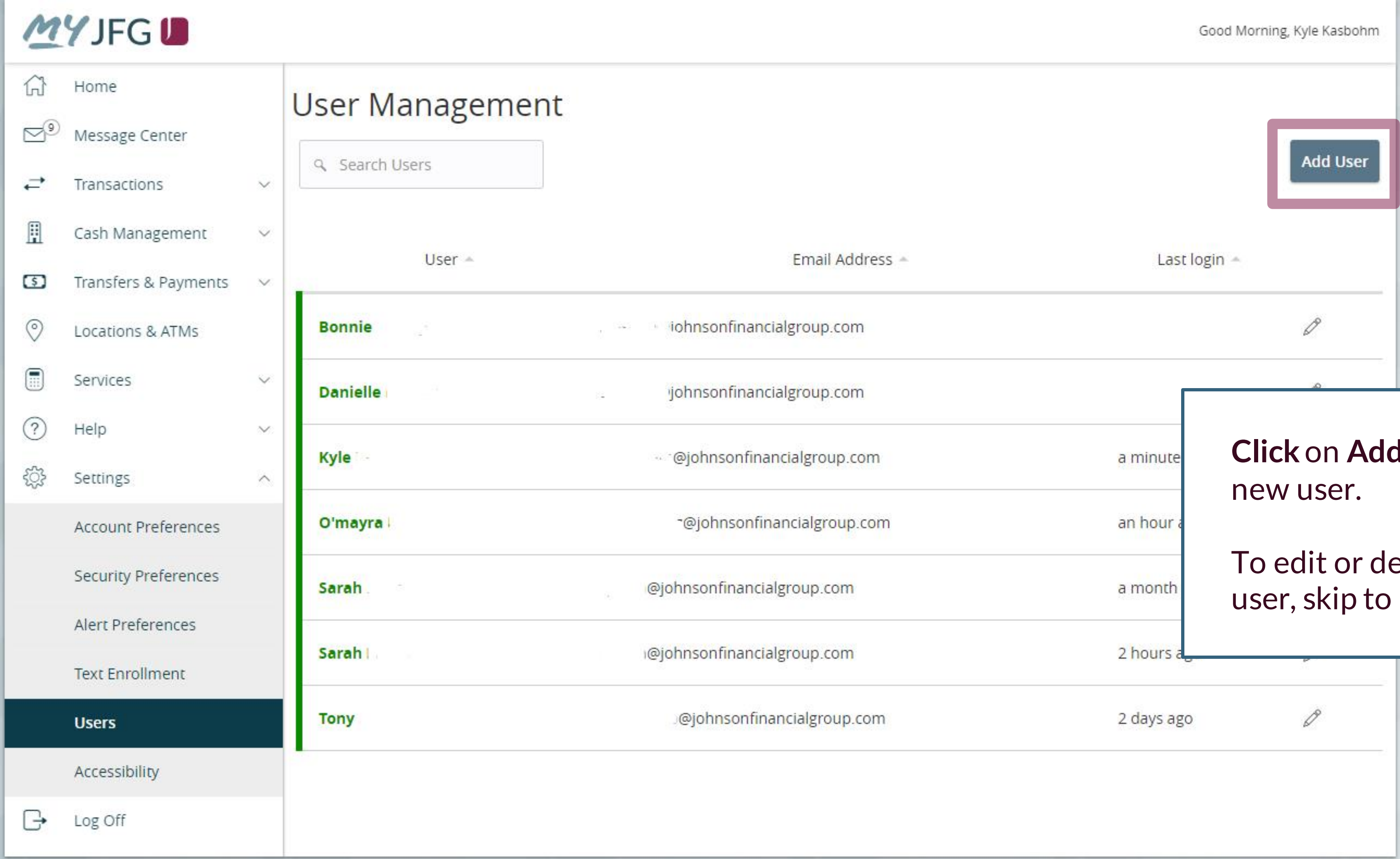
# User Administration

To create, edit, or delete users within MyJFG

JOHNSON FINANCIAL GROUP®




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



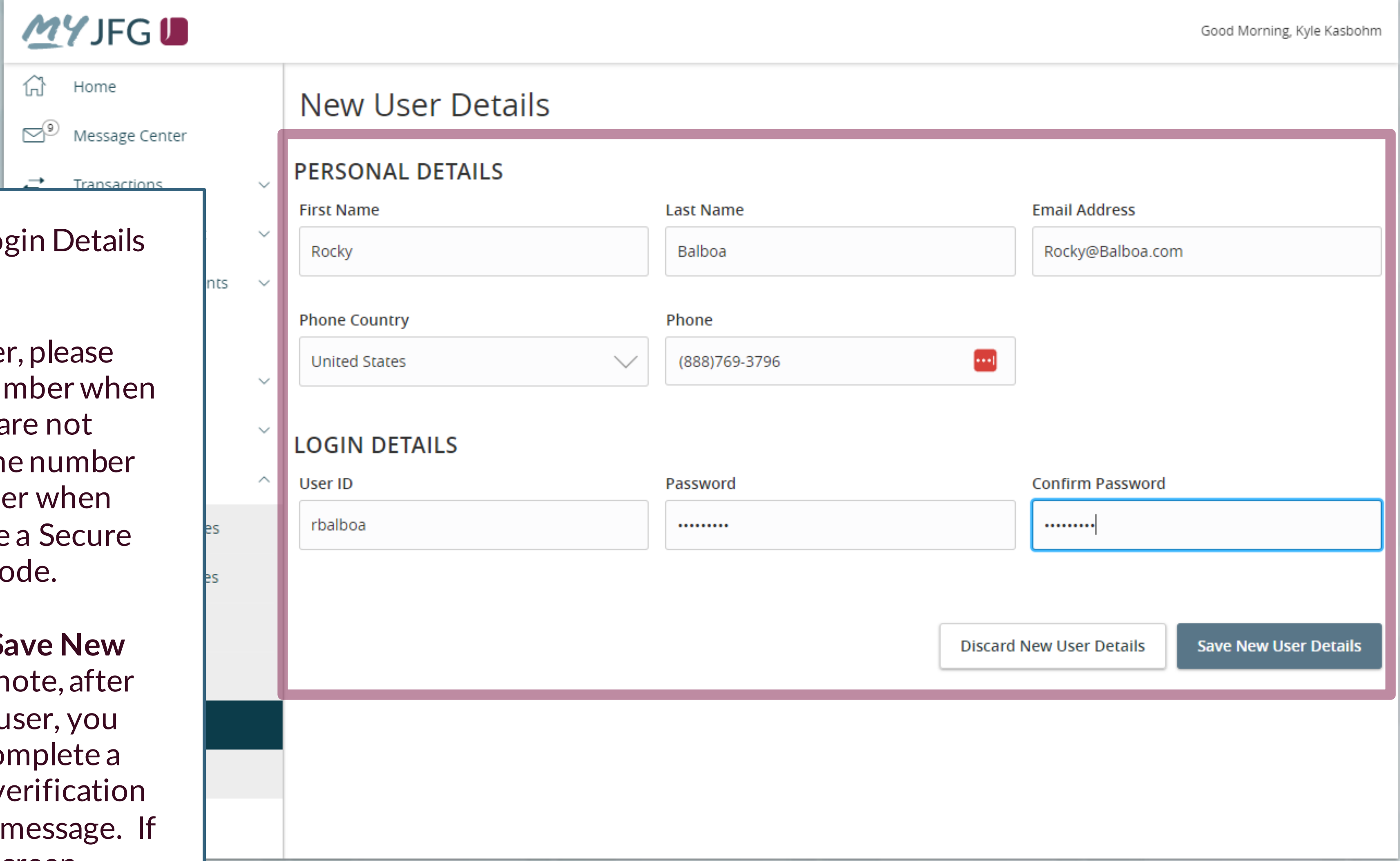

**Click** on **Add User** to create a new user.

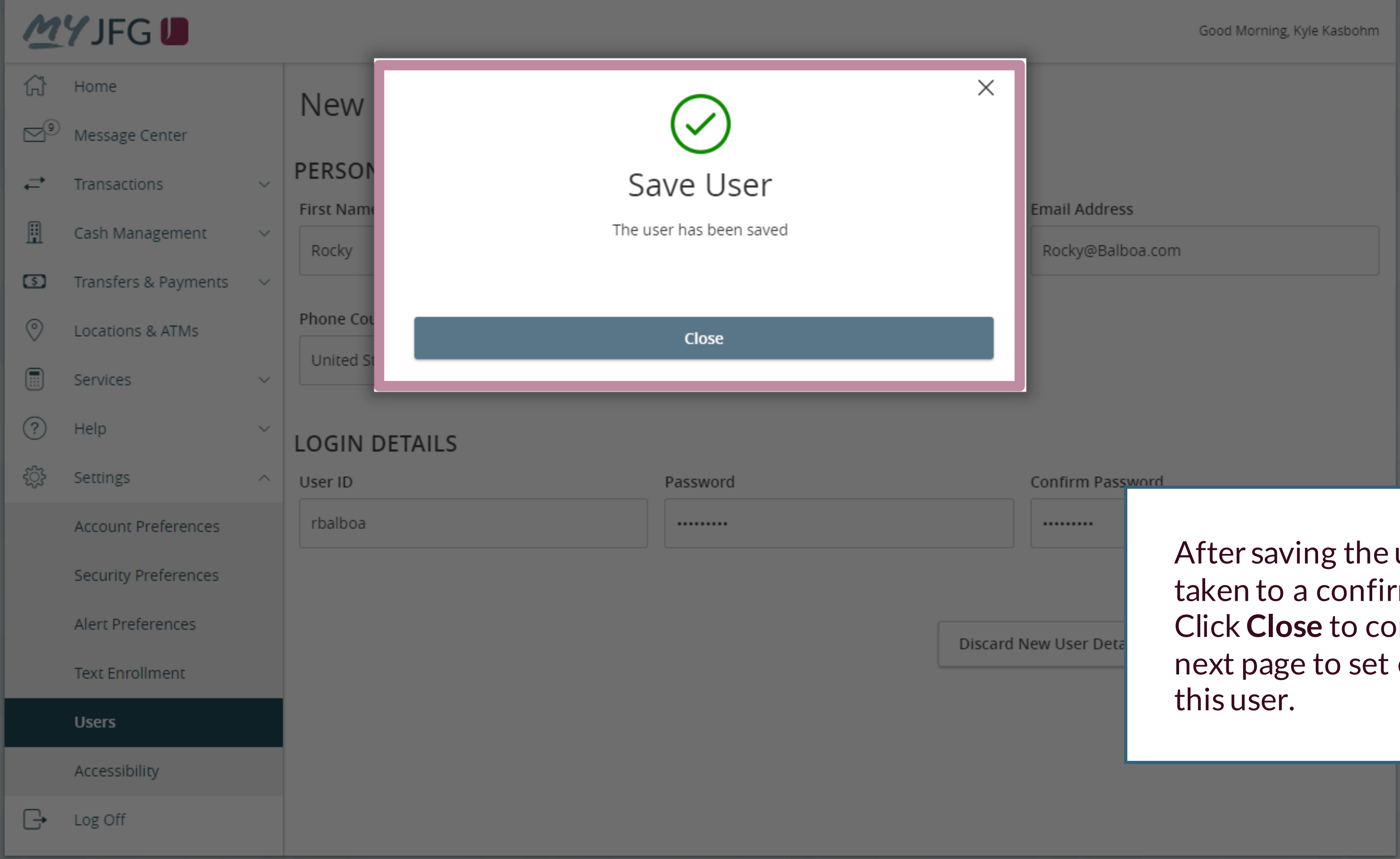
To edit or delete an existing user, skip to page 16.

Fill in Personal and Login Details for this user.

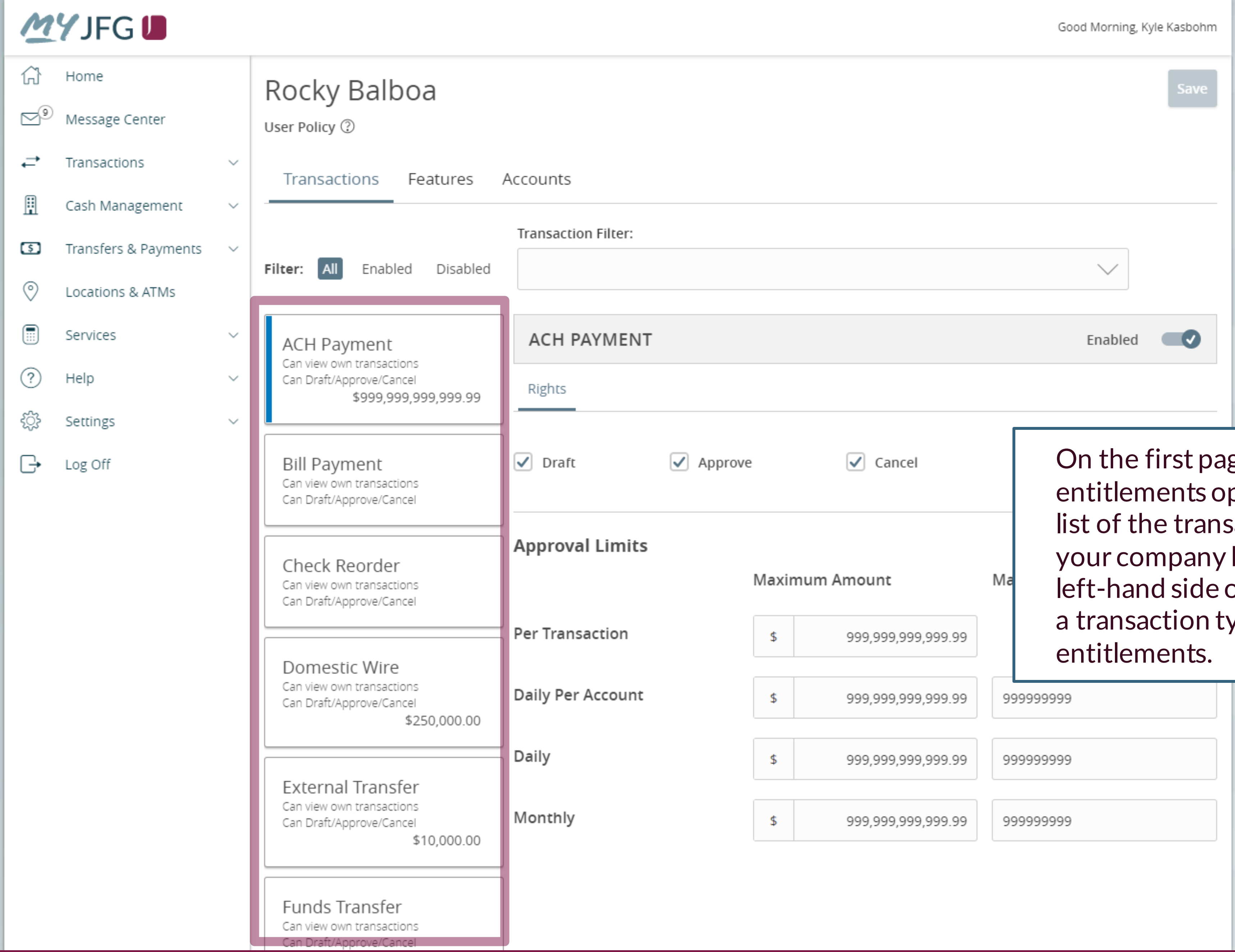
For the phone number, please use a direct phone number when possible. Extensions are not supported. This phone number will be used by the user when logging in to complete a Secure Access Verification Code.

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.





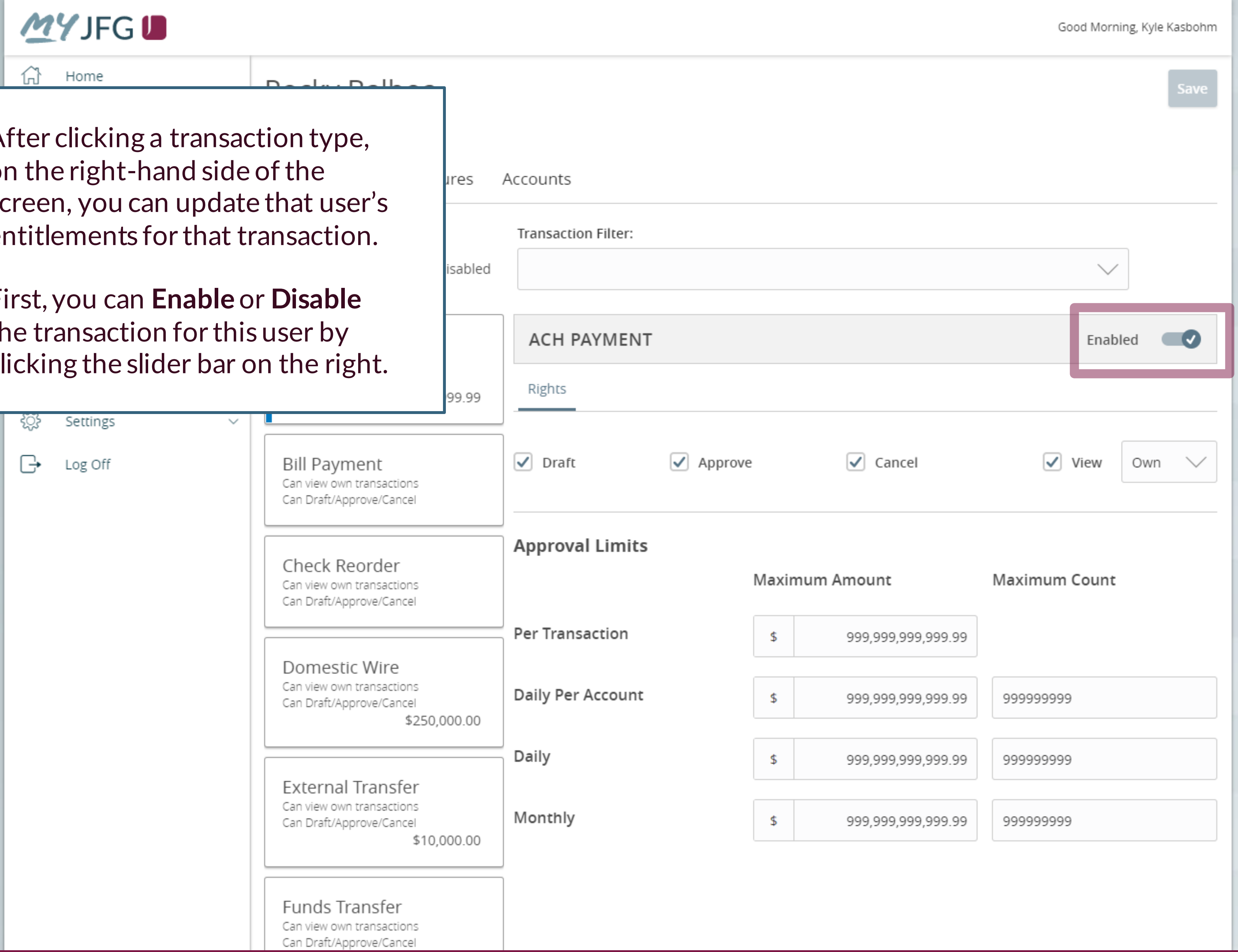

After saving the user, you will be taken to a confirmation screen. Click **Close** to continue to the next page to set entitlements for this user.

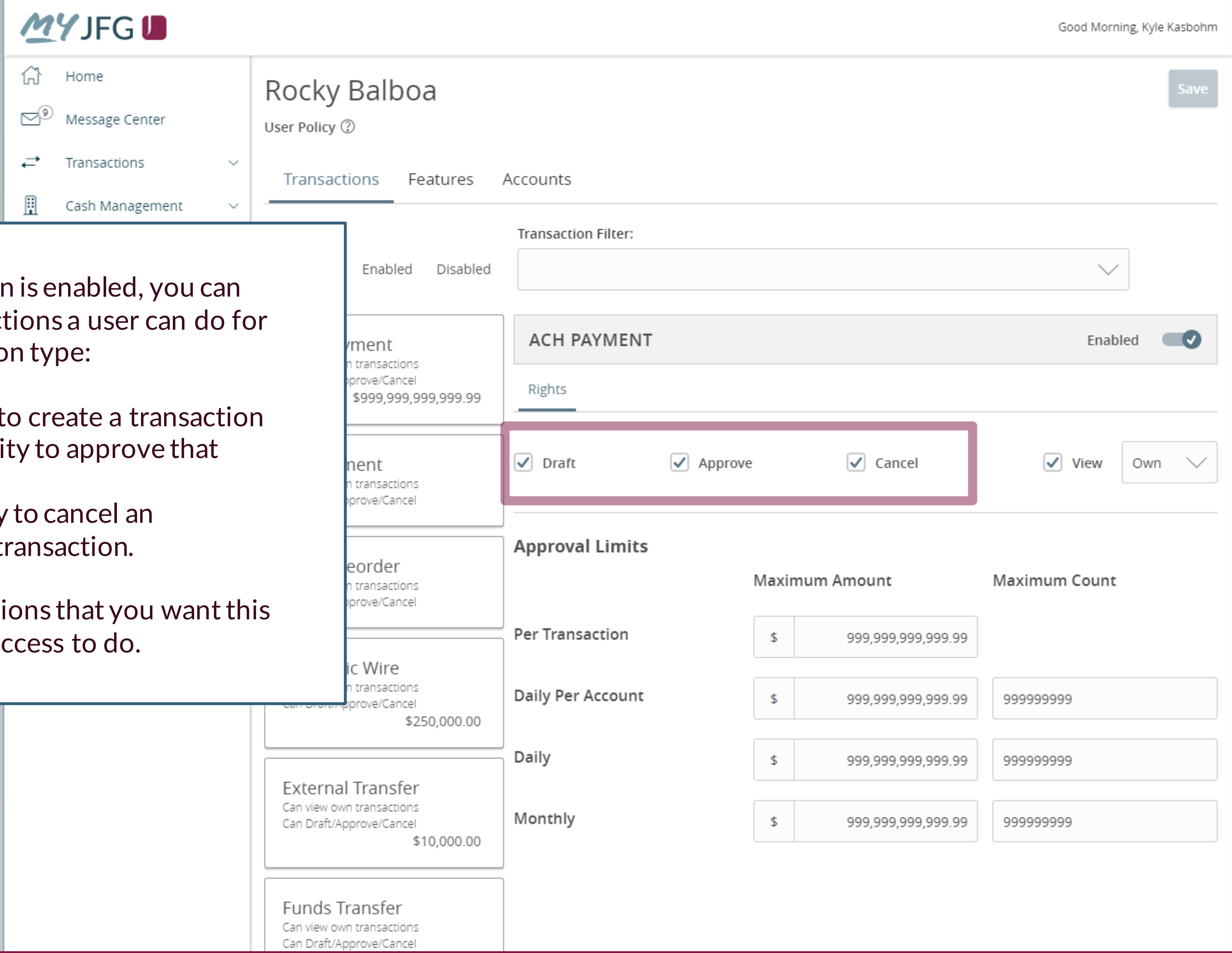



On the first page of the entitlements options, you will see a list of the transaction types that your company has access to on the left-hand side of the screen. Click a transaction type to edit those entitlements.

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.






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:

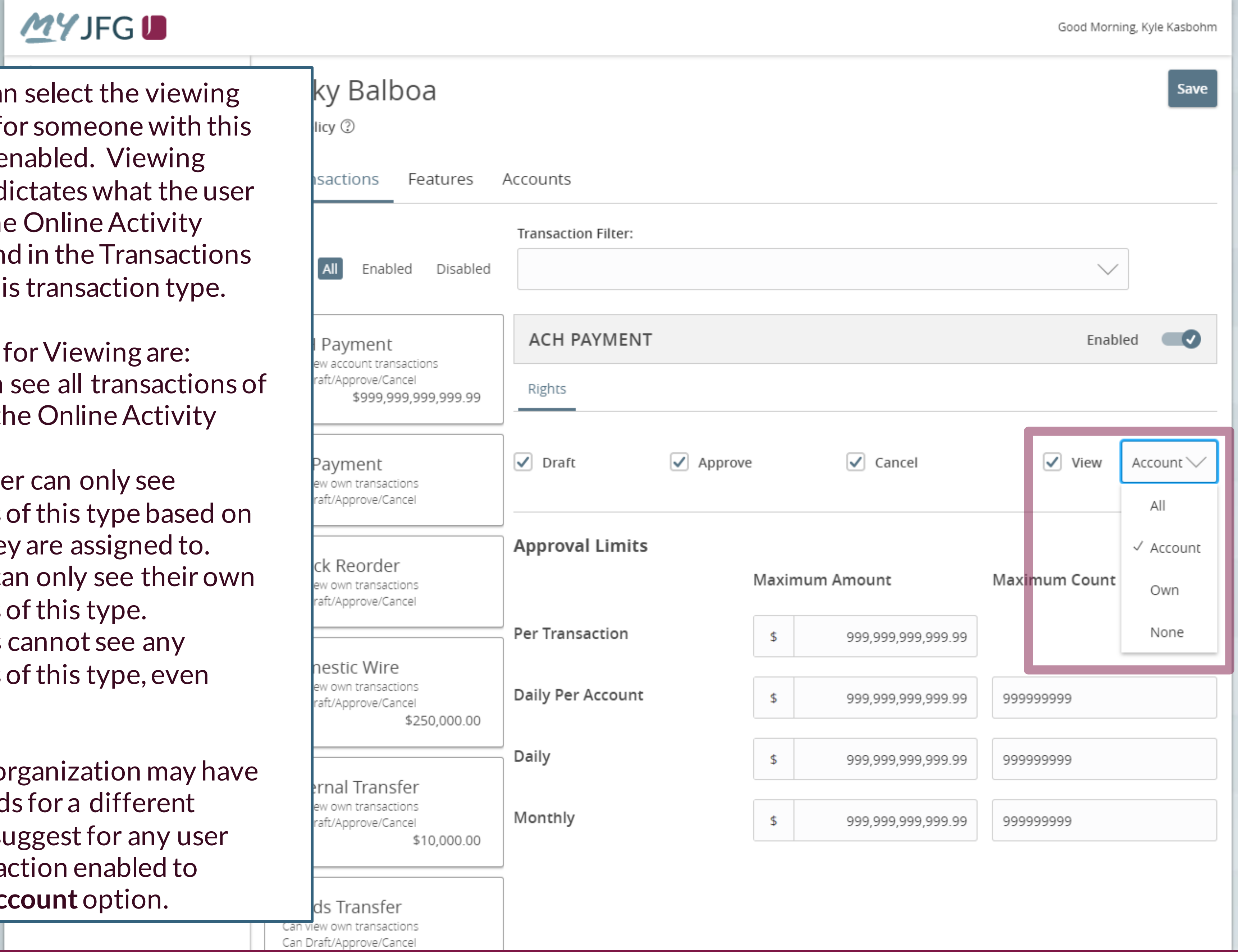
**All**: User can see all transactions of this type in the Online Activity Center

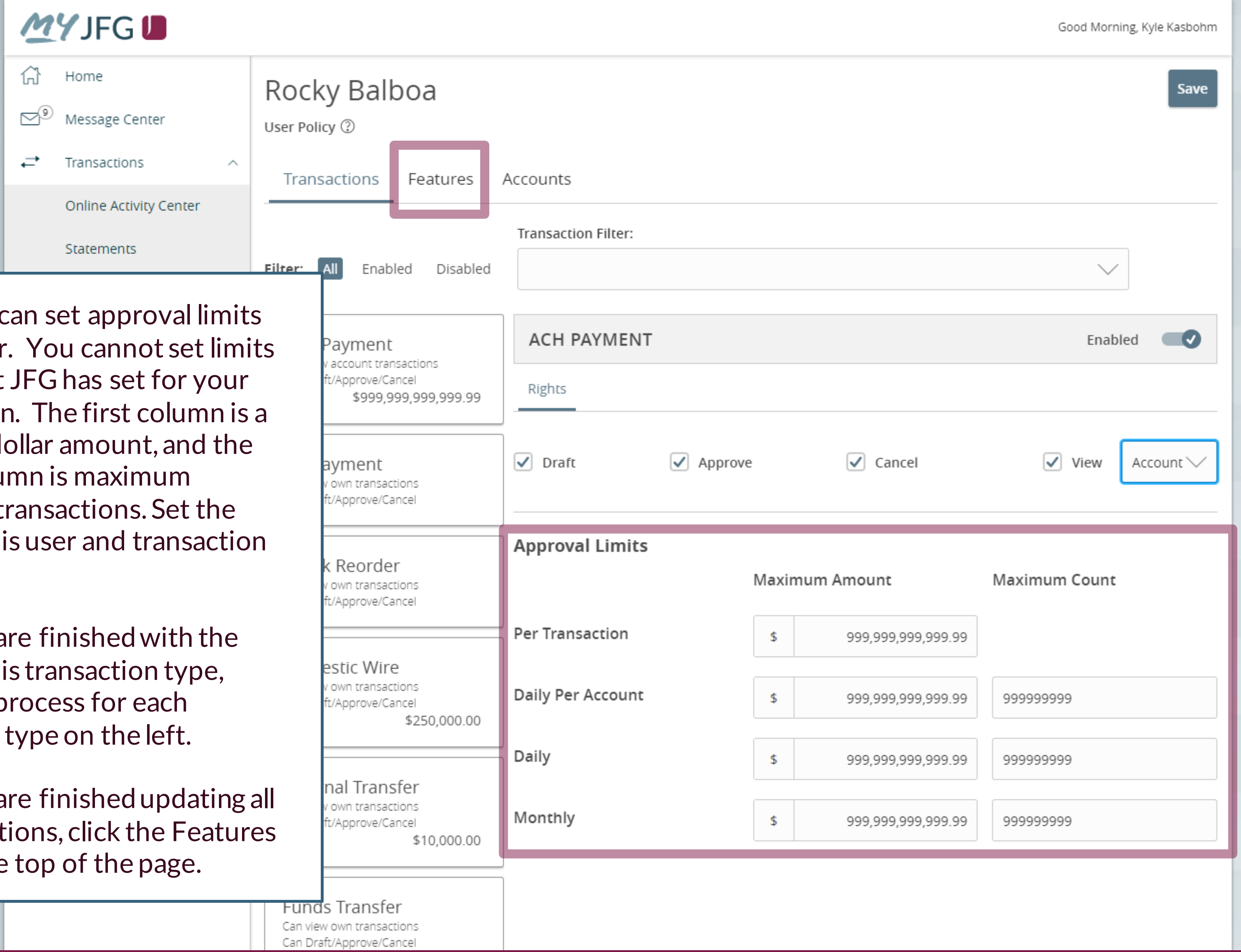
**Account**: User can only see transactions of this type based on accounts they are assigned to.

**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.






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.

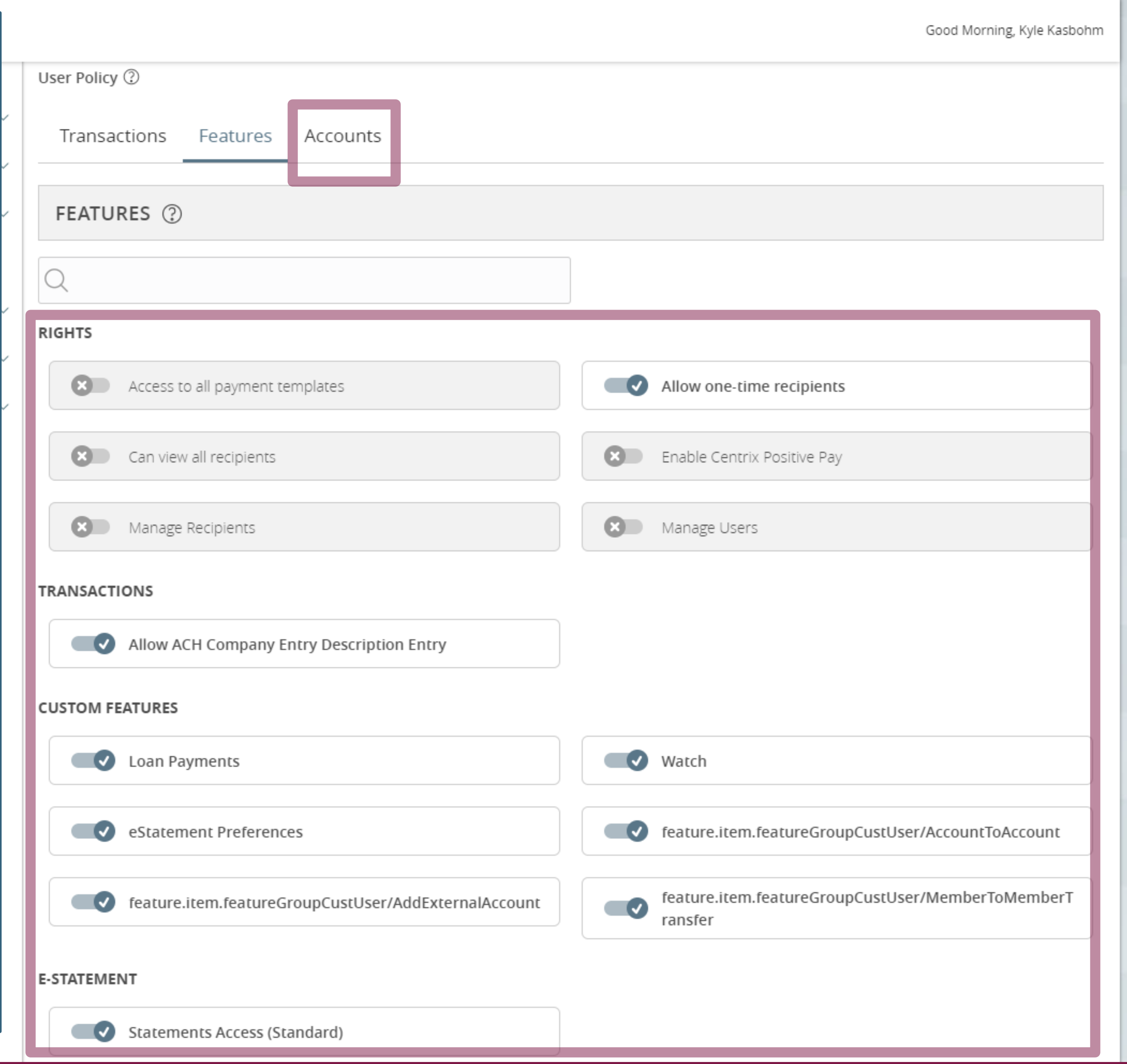
When you are finished updating all the transactions, click the Features tab near the top of the page.

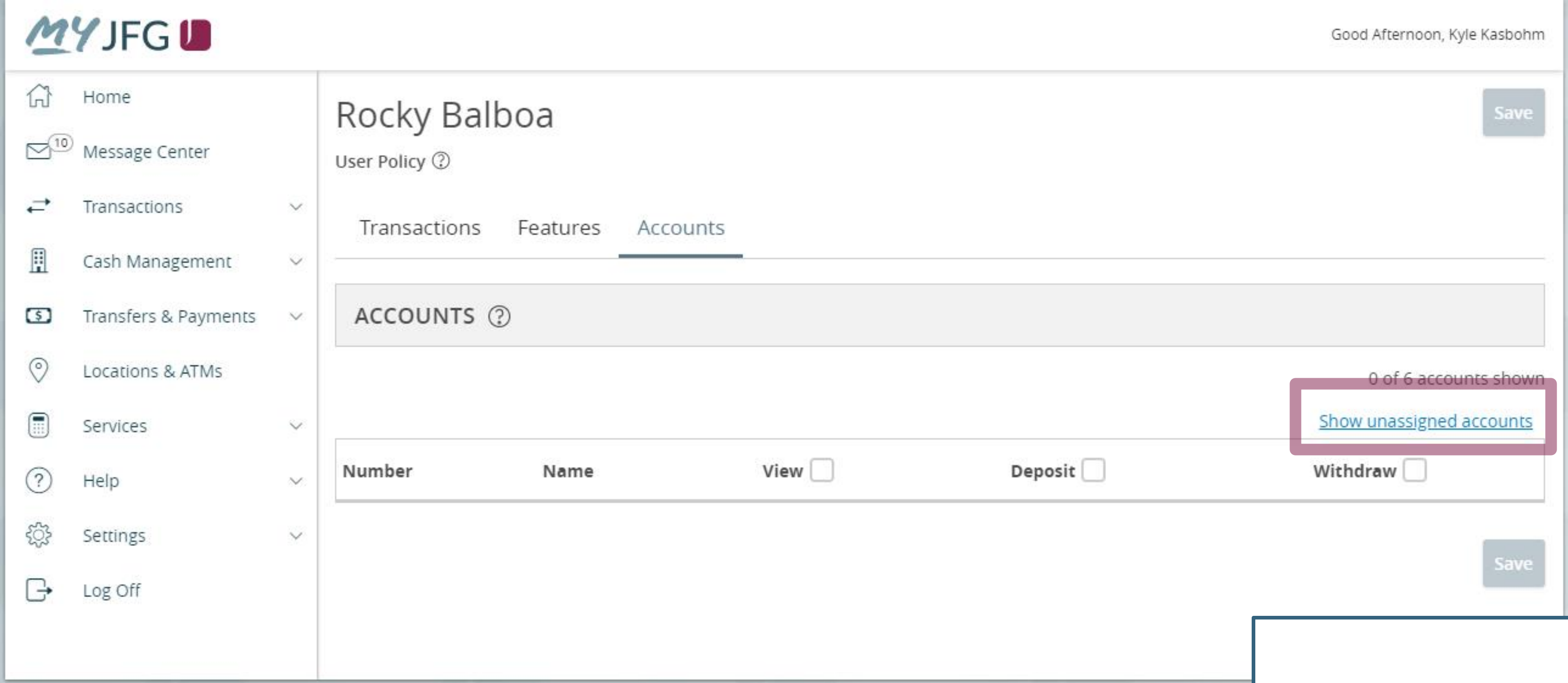
On the Features tab, you can set more general online banking functions for this user. Set the features you'd like for this user. Below are some general suggestions for the features based on services a user may need access to. However, please set features based on your organization's needs. When you are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






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.

Good Afternoon, Kyle Kasbohm

Save

# Rocky Balboa

User Policy

Transactions Features Accounts

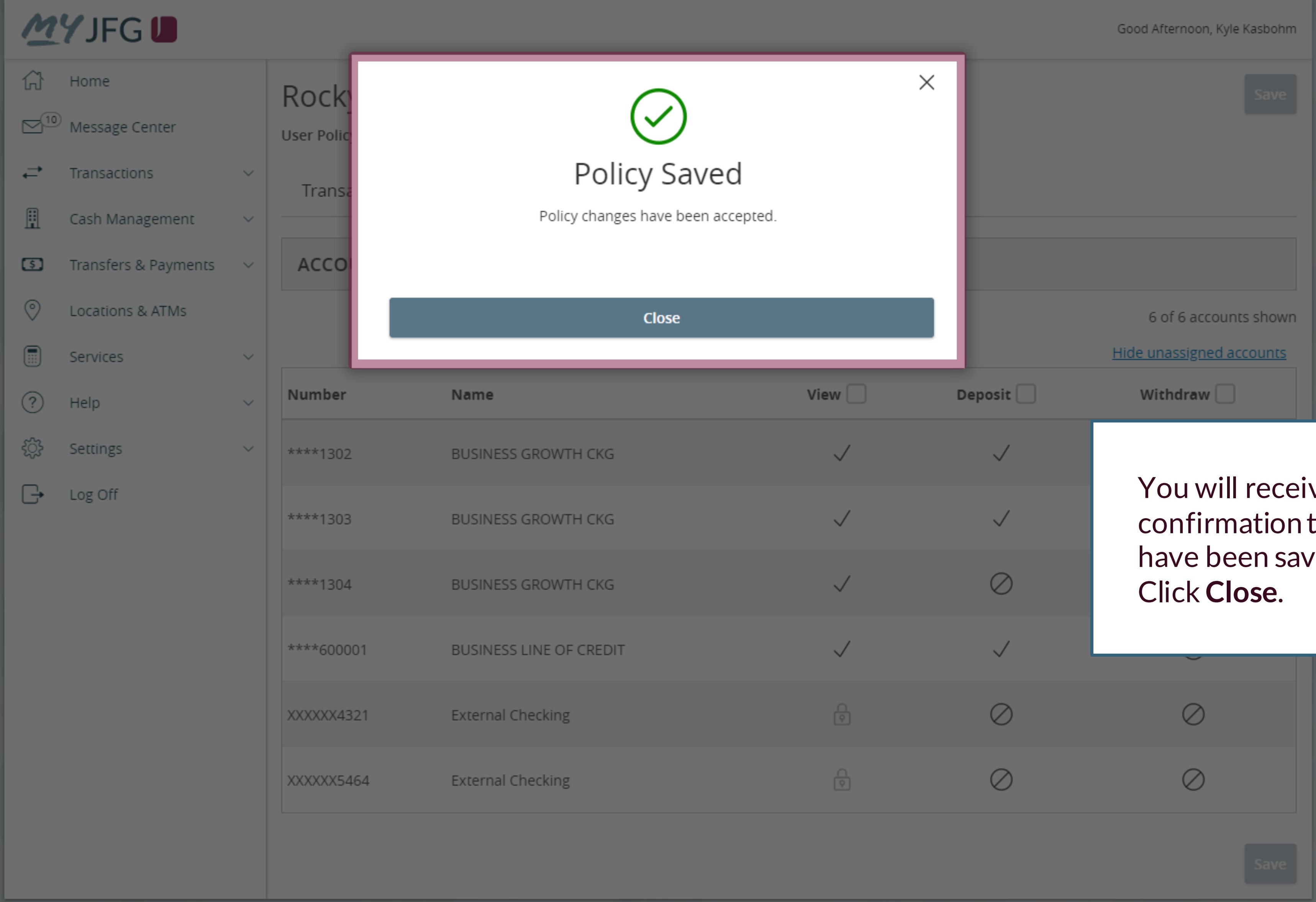
## ACCOUNTS

6 of 6 accounts shown

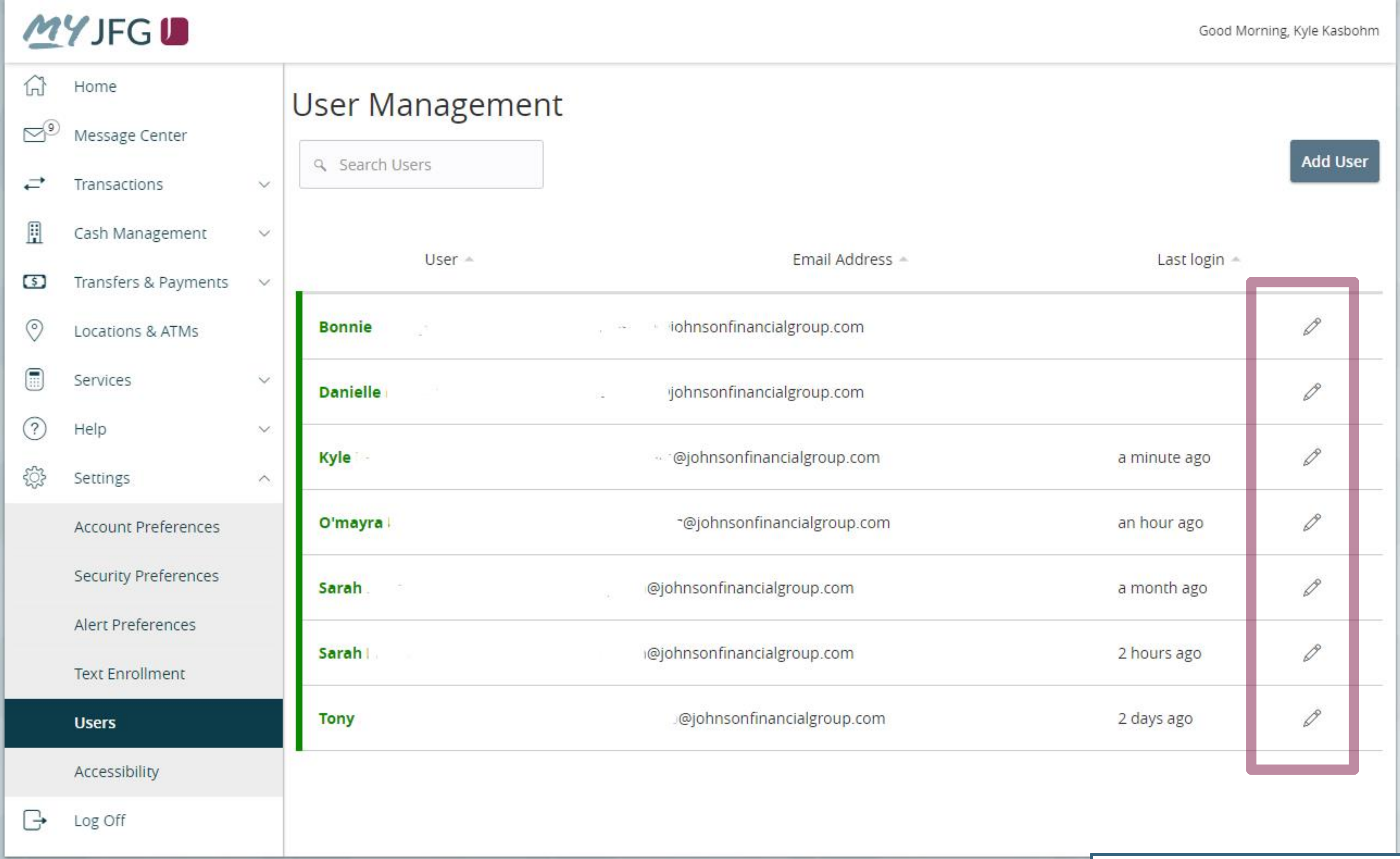
Hide unassigned accounts

| Number | Name | View | Deposit | Withdraw |
|---|---|---|---|---|
| ****1302 | BUSINESS GROWTH CKG | ✓ | ✓ | ✓ |
| ****600001 | BUSINESS LINE OF CREDIT | ✓ | ✓ | ⊘ |
| ****1303 | BUSINESS GROWTH CKG | ✓ | ✓ | ✓ |
| ****1304 | BUSINESS GROWTH CKG | ✓ | ⊘ | ⊘ |
| XXXXXX4321 | External Checking | 🔒 | ⊘ | ⊘ |
| XXXXXX5464 | External Checking | 🔒 | ⊘ | ⊘ |

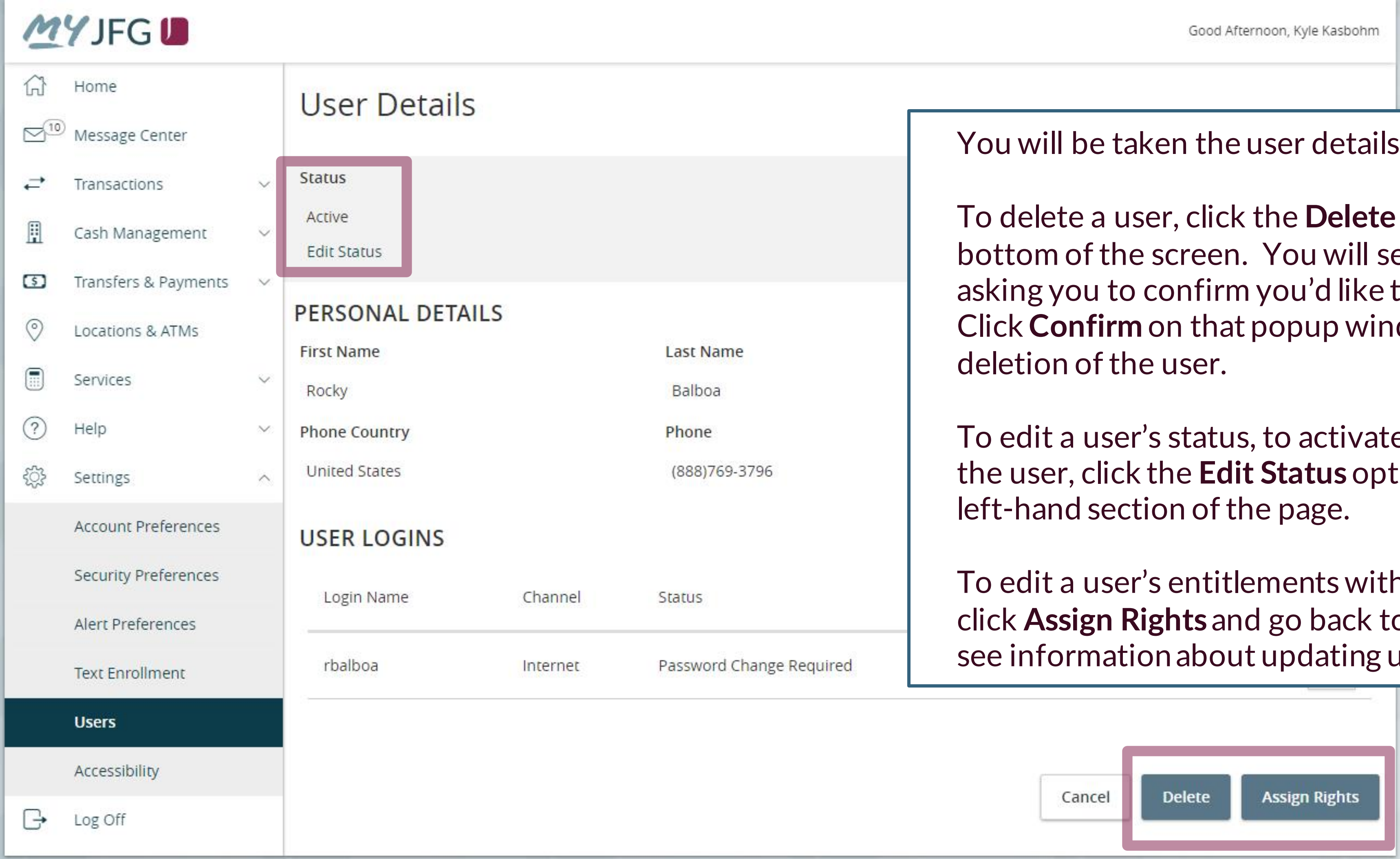
Save




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




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




You will be taken 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.