

Creating Users in MyJFG for Single Sign On Entitlements Only

- Deposit Partner
- Positive Pay
- Deluxe Merchant Services

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*.
- **Except Deluxe Merchant Services users. See page 16 for extra information on Deluxe Merchant Services Single Sign On.*



Click an account tile to view details and transaction history. ✕

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Home



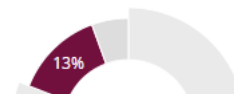
ACCOUNTS

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

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



COMMERCIAL CHECKING	
****2630	80.96%
Available Balance	\$12.54

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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 > Single Sign On Only

User Role Policy

Transactions Features Accounts

Transaction Filter:

Filter: All Enabled Disabled

ACH Payment Disabled

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

Domestic Wire
 Can view all transactions
 Can Draft/Approve/Cancel
 \$150,000.00

Funds Transfer
 Can view all transactions
 Can Draft/Approve/Cancel
 \$999,999,999,999.99

Stop Payment
 Can view all transactions
 Can Draft/Approve/Cancel

ACH PAYMENT Disabled

View None

Transaction Disabled
 Please enable this transaction type above in order to set limits

Save

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.

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- Locations & ATMs

User Roles > 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.

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.

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

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FEATU



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

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

LOGIN DETAILS

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

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.

Discard

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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.

The screenshot shows the MYJFG user management interface. A modal dialog box titled "Save User" is centered on the screen, indicating that the user has been saved. The dialog contains a green checkmark icon, the text "Save User", and "The user has been saved". A "Close" button is located at the bottom of the dialog. In the background, the "New User" form is visible, with fields for "First Name" (John), "Email Address" (JMcClane@NakatomiPlaza.com), "Phone Country" (United States), "User ID" (JMcClane), and "User Role" (Single Sign On Only). The left sidebar shows the navigation menu with "Users" highlighted.

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.

Please note, any users for these Single Sign On applications will also need user profiles built within those systems. When your user is created in both systems, 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.

Special Notes for Deluxe Merchant Services users

- Please see the **Deluxe Merchant Services Single Sign On** guide for details on how to connect your AccessJFG profile to your Deluxe Merchant Services profile.



Reminder

- 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*.
- **Deluxe Merchant Services Users will not need to email for the Single Sign On link. Please follow this entire guide and see page 16 for extra information on Deluxe Merchant Services Single Sign On.*



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.

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