

User Administration: Creating Users for DepositPartner only

DepositPartner is only accessible via MyJFG. This guide will walk you through the process of building a user in MyJFG if you don't want them to have any online banking access except for DepositPartner



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

-  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

Home

ACCOUNTS ⋮

BUSINESS LINE OF CREDIT 600001 ⋮	
Current Balance	\$0.00
Available Balance	\$25,000.00

- Transfer Money >
- Credit Card Access >

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

- Home
- Message Center
- Transactions
- Cash Management
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- 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 ago	
O'mayra	@johnsonfinancialgroup.com	an hour ago	
Sarah	@johnsonfinancialgroup.com	a mon	
Sarah	@johnsonfinancialgroup.com	2 hour	
Tony	@johnsonfinancialgroup.com	2 days	

Click on Add User to create your DepositPartner user.

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". Below the message is a blue "Close" button. The background interface is dimmed, showing a sidebar with navigation options like Home, Message Center, Transactions, Cash Management, Transfers & Payments, Locations & ATMs, Services, Help, and Settings. The main content area is titled "New PERSON" and includes fields for "First Name" (Rocky), "Phone Co" (United S), "Email Address" (Rocky@Balboa.com), "User ID" (rbalboa), "Password", and "Confirm Password". 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

Daily \$ 999,999,999,999.99

Monthly \$ 999,999,999,999.99

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. For a DepositPartner only user, you'll need to disable all of these transactions. Click the **Enabled Slider Bar** on the right side of the screen to **Disable** the transaction. Repeat this for every transaction option on the left.

- 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

 Disabled

ACH PAYMENT

Disabled



Bill Payment

 Disabled

Transaction Disabled

Please enable this transaction type above in order to set limits

Check Reorder

 Disabled

Domestic Wire

 Disabled

External Transfer

 Disabled

Funds Transfer

 Disabled

Stop Payment

 Disabled

When you are finished disabling every transaction, your screen should look like this.

Next, click the Features tab.

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

Rocky Balboa

Save

User Policy ?

- Transactions
- Features
- Accounts

FEATURES ?



RIGHTS

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

TRANSACTIONS

- 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

On the Features tab, make sure that every feature on this tab is turned off. Your screen should look like this page when every feature is turned off.

Next, click the **Accounts** tab

The screenshot shows the MYJFG user 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 "User Policy". Below this, there are three tabs: Transactions, Features, and Accounts (which is currently selected). A "Save" button is highlighted in a red box in the top right corner. The Accounts tab displays a header "ACCOUNTS" with a help icon, followed by the text "0 of 6 accounts shown" and a link "Show unassigned accounts". Below this is a table with columns: Number, Name, View (with a checkbox), Deposit (with a checkbox), and Withdraw (with a checkbox). The table is currently empty.

The accounts tab should look like this page with no accounts assigned. If so, click **Save**.

If you do see accounts listed here, make sure every account is turned off using the  icon. Even though this profile will need to deposit into an account, DepositPartner is a separate platform and the deposit function here doesn't refer to DepositPartner entitlements. Click **Save** when finished.

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

Rocky

User Policy

Transa

ACCO

Number

Name

View Deposit Withdraw

Save

0 of 8 accounts shown

[Show unassigned accounts](#)

Policy Saved

Policy changes have been accepted.

[Close](#)

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

This user will also need to be created in DepositPartner. Please see the DepositPartner User Administration guide for that process.

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)

