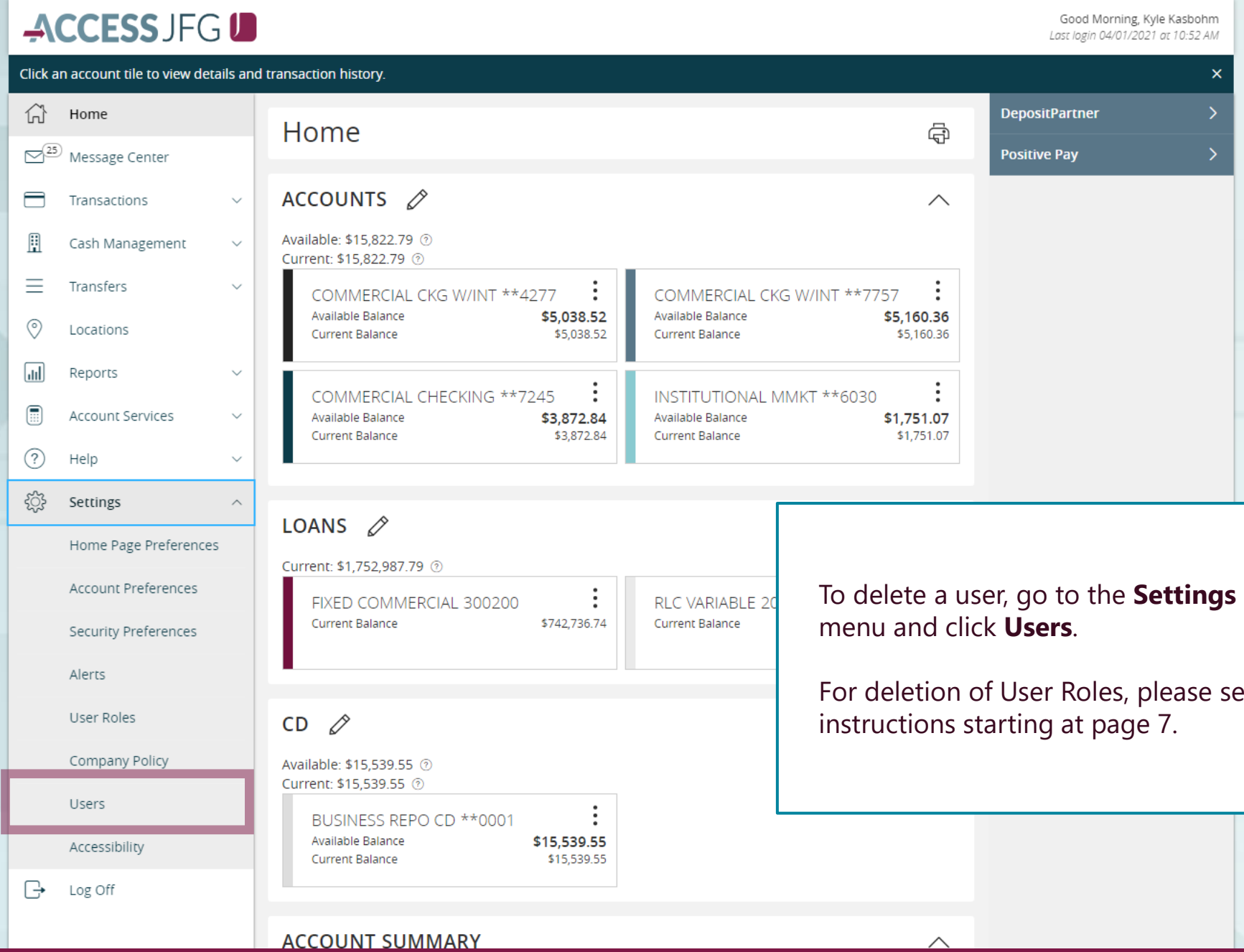
JOHNSON FINANCIAL GROUP®
BANKING
WEALTH
INSURANCE

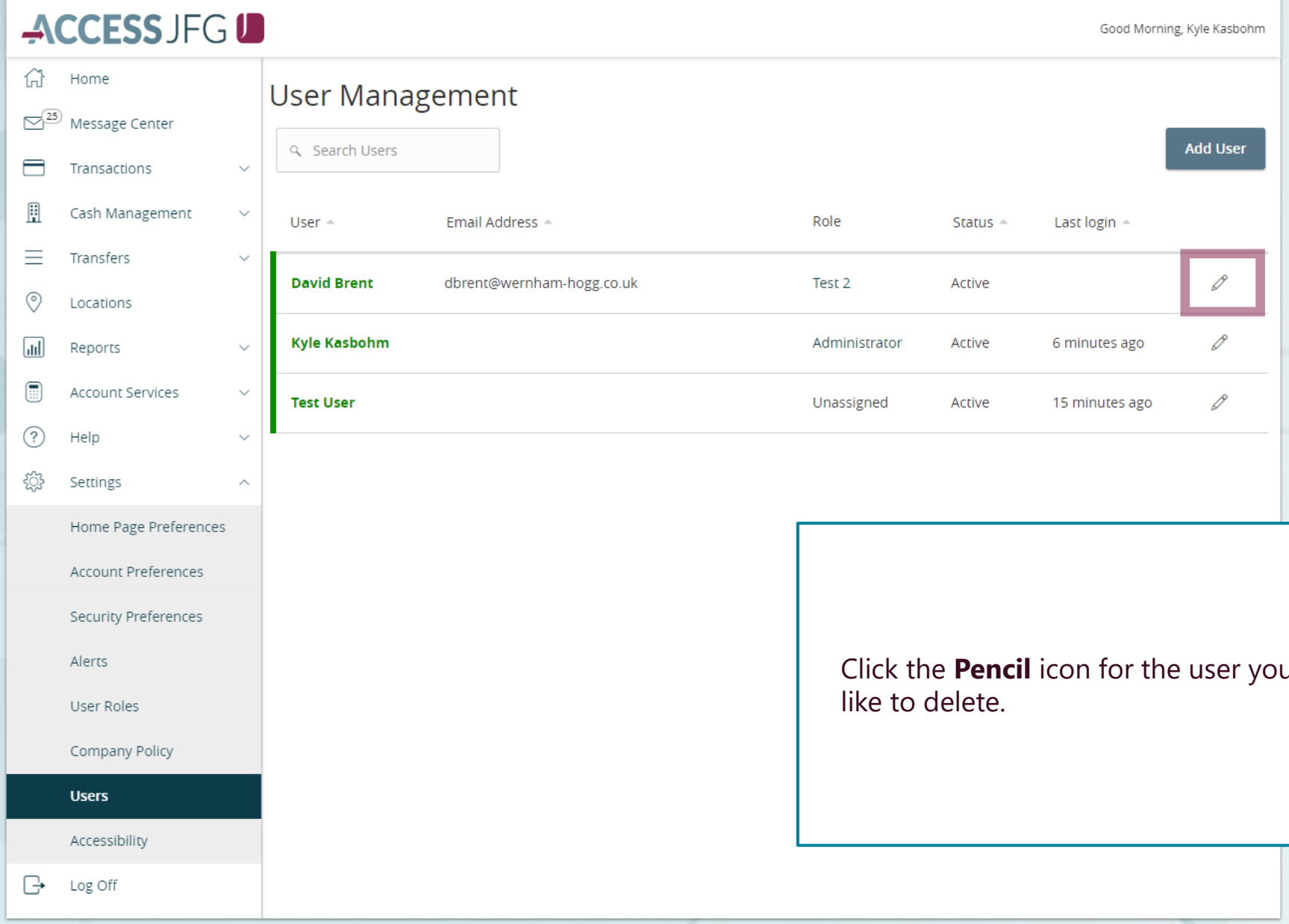
Deleting Users and User Roles in AccessJFG

Note: please see page 11 of this guide for important transaction processing information regarding deleting Users and/or User Roles.

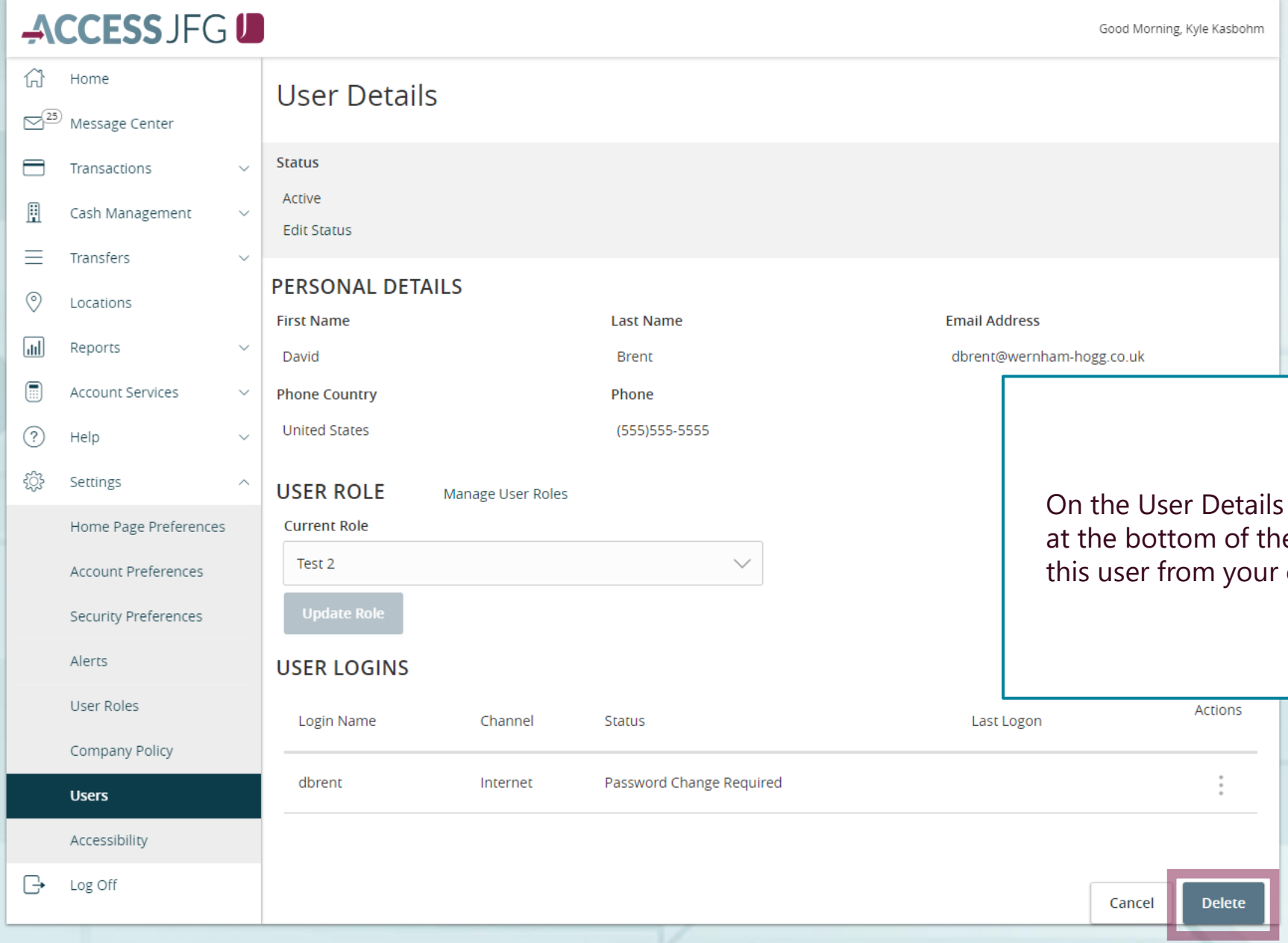


To delete a user, go to the **Settings** menu and click **Users**.

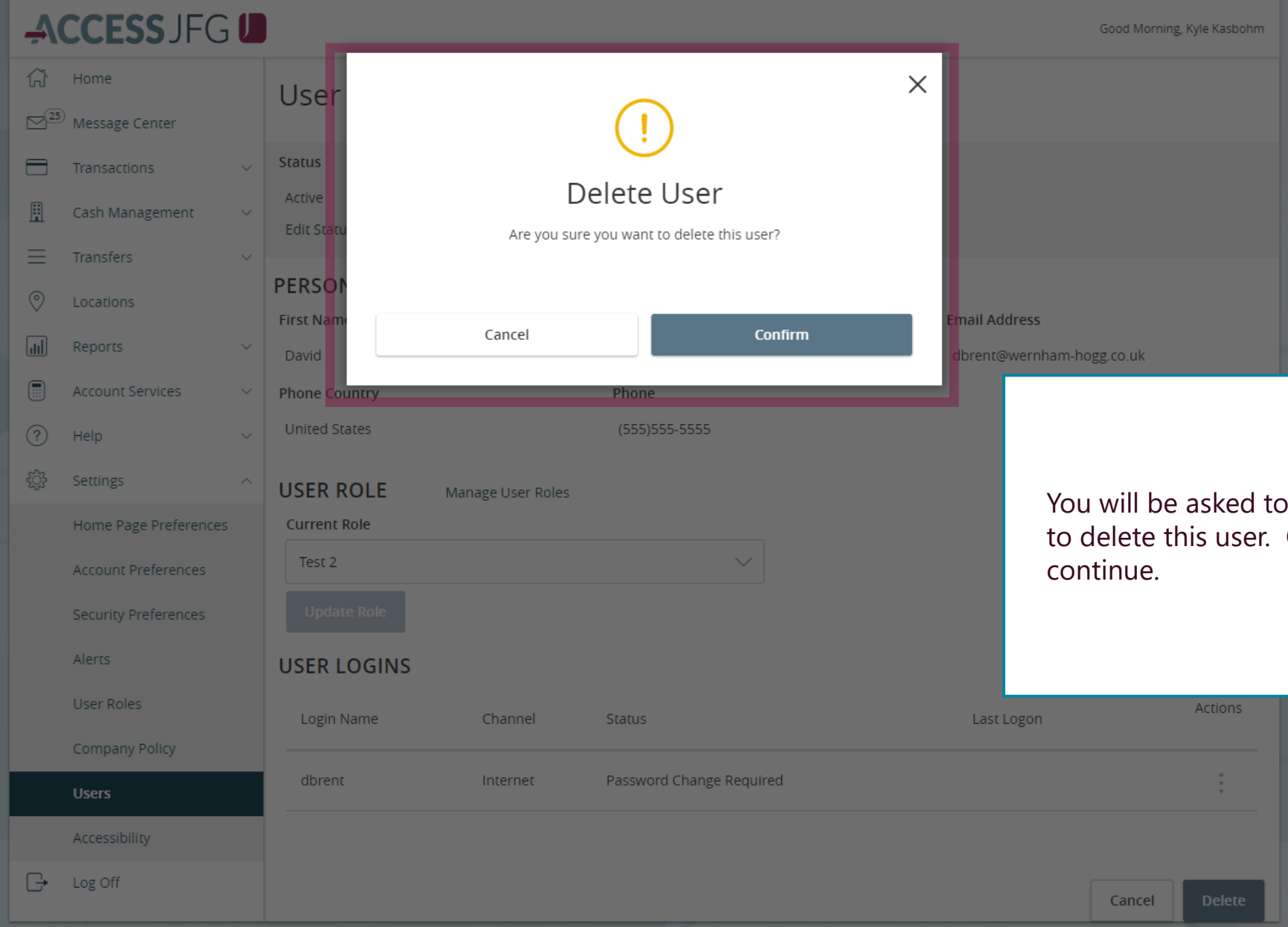
For deletion of User Roles, please see instructions starting at page 7.



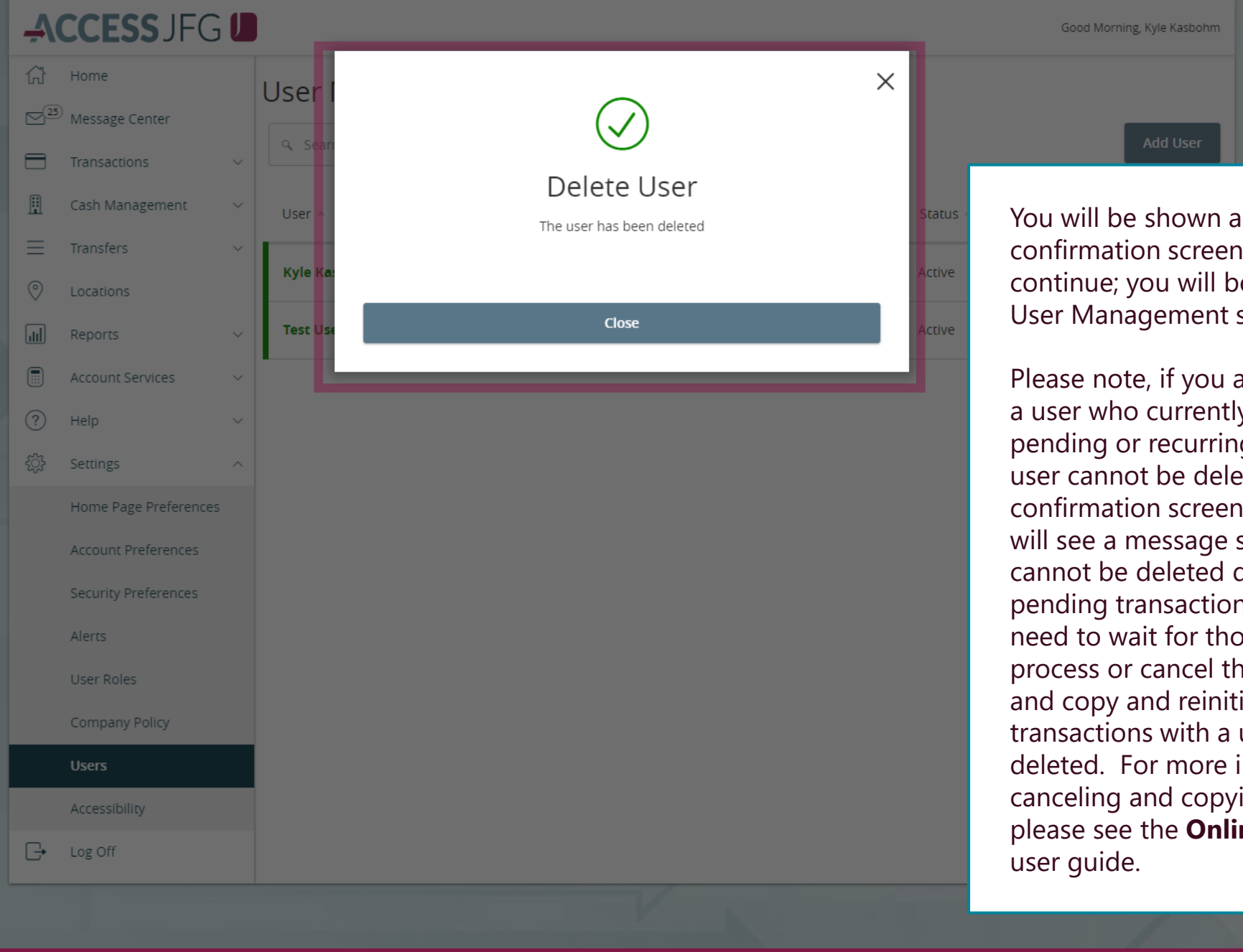
Click the **Pencil** icon for the user you'd like to delete.



On the User Details screen, click **Delete** at the bottom of the page to delete this user from your company's profile.

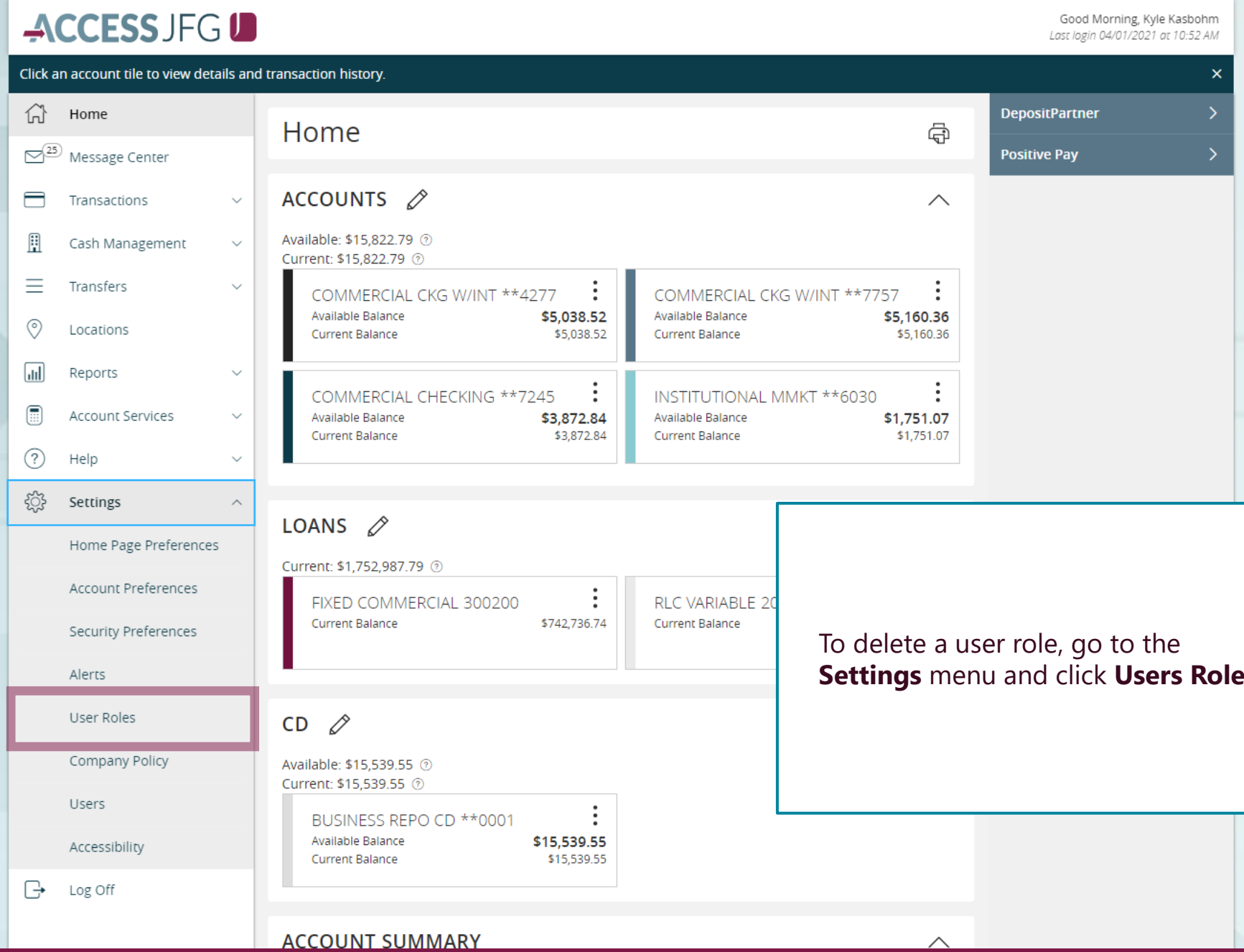


You will be asked to confirm you want to delete this user. Click **Confirm** to continue.

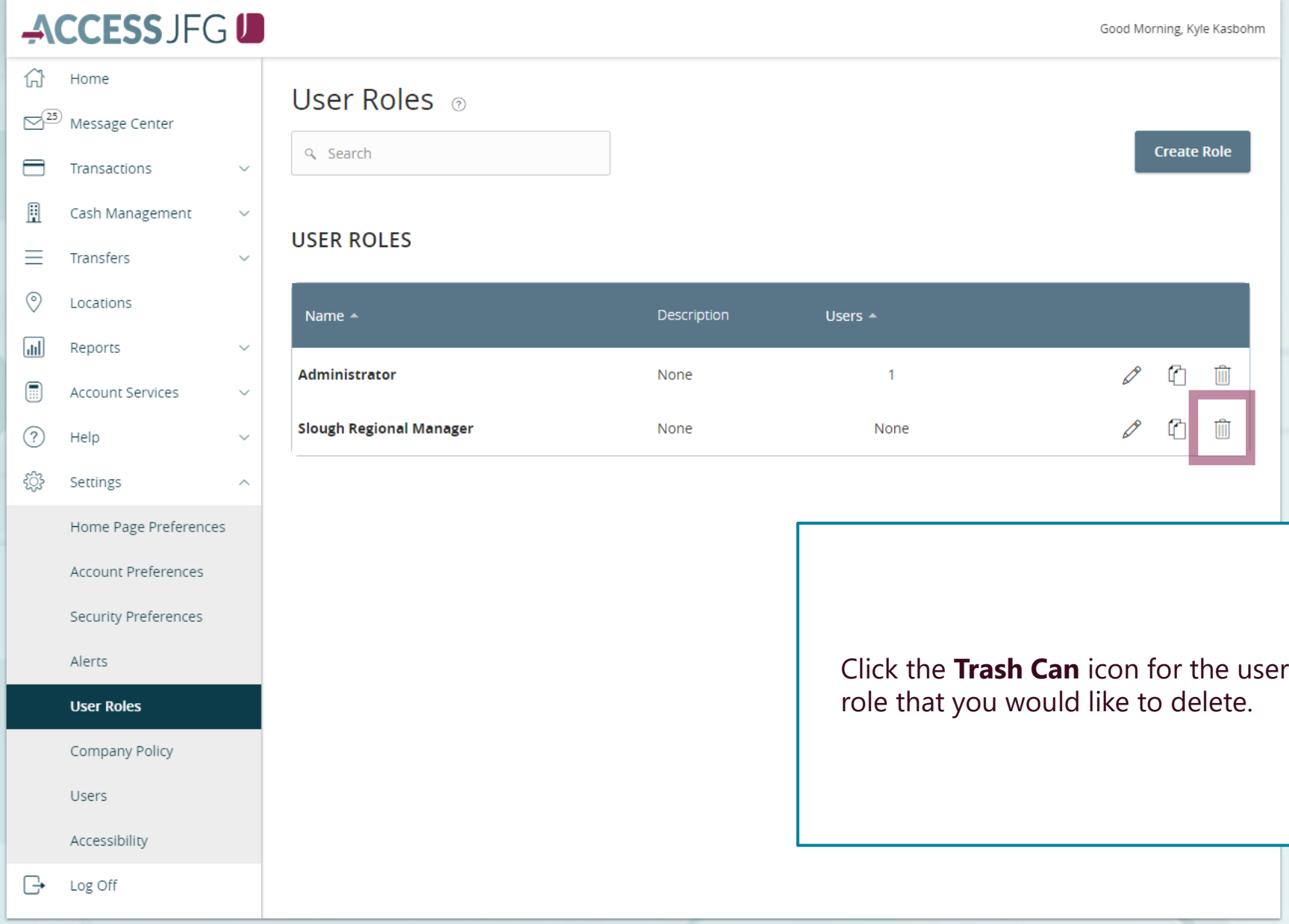


You will be shown a Delete User confirmation screen. Click **Close** to continue; you will be taken back to the User Management screen.

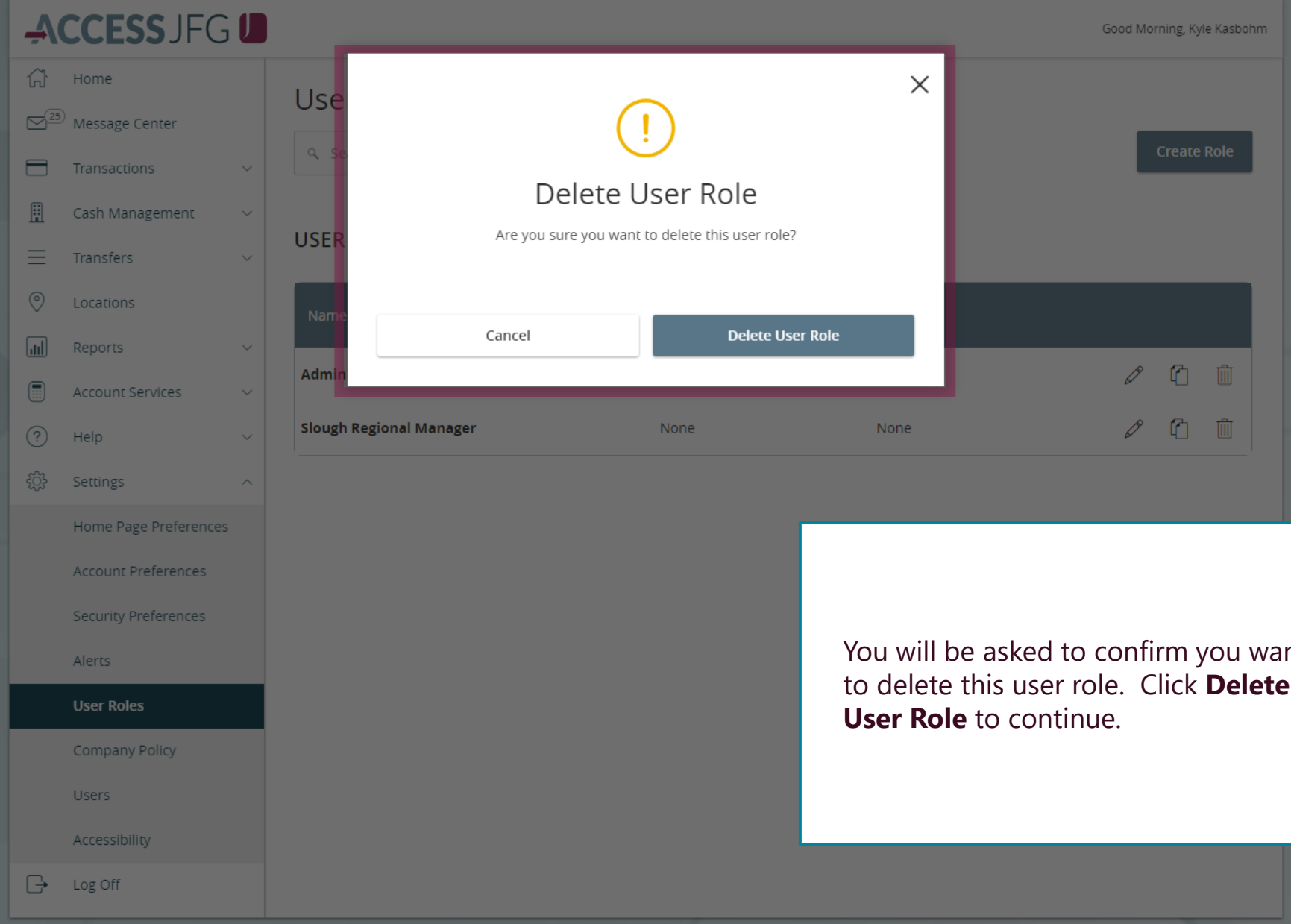
Please note, if you are trying to delete a user who currently has outstanding pending or recurring transactions, the user cannot be deleted; instead of the confirmation screen you see here, you will see a message stating the user cannot be deleted due to those pending transactions. You will either need to wait for those transactions to process or cancel those transactions and copy and reinitiate those transactions with a user who will not be deleted. For more information on canceling and copying transactions, please see the **Online Activity Page** user guide.



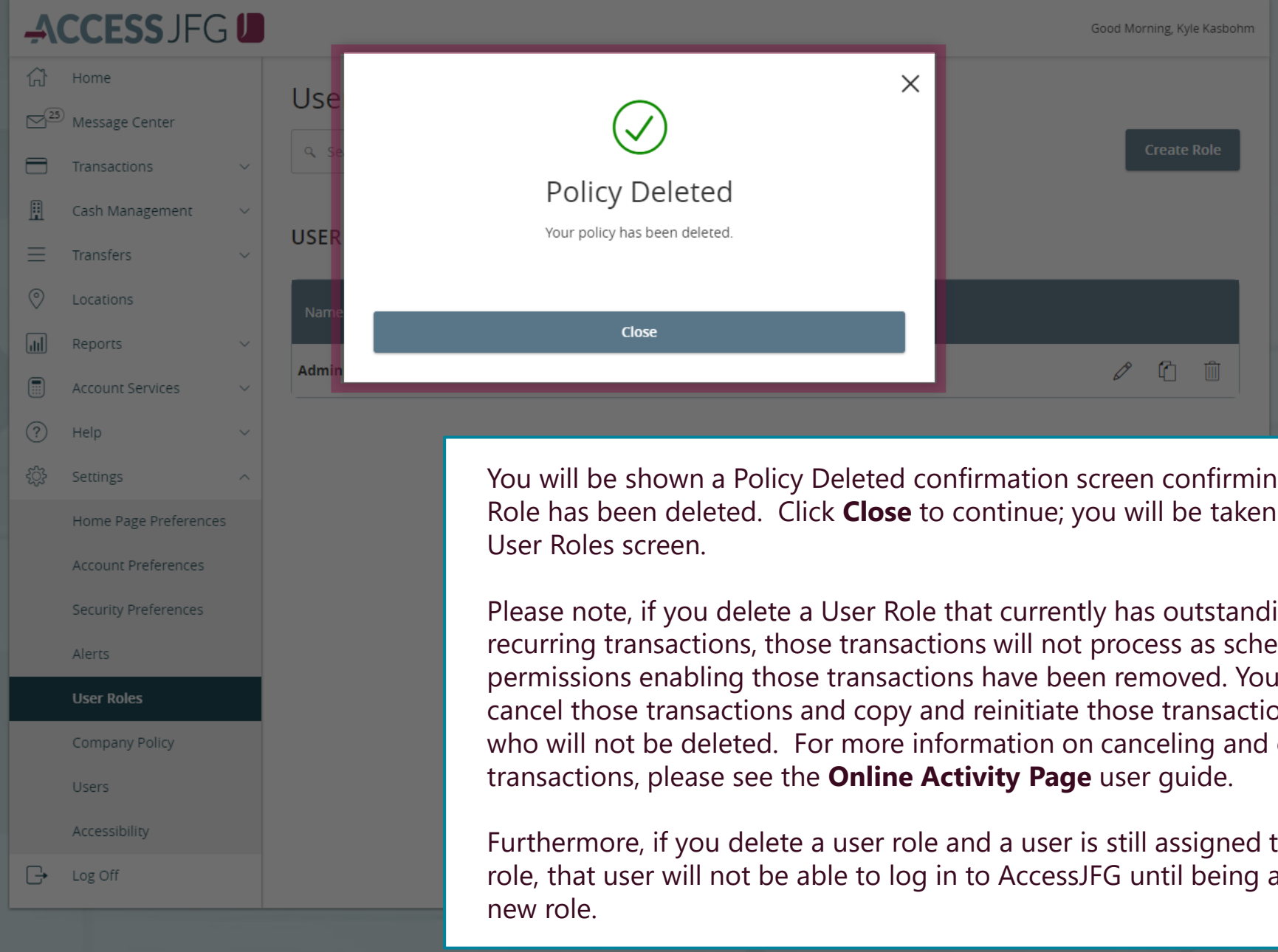
To delete a user role, go to the **Settings** menu and click **Users Roles**.



Click the **Trash Can** icon for the user role that you would like to delete.



You will be asked to confirm you want to delete this user role. Click **Delete User Role** to continue.



You will be shown a Policy Deleted confirmation screen confirming that the User Role has been deleted. Click **Close** to continue; you will be taken back to the User Roles screen.

Please note, if you delete a User Role that currently has outstanding pending or recurring transactions, those transactions will not process as scheduled as the permissions enabling those transactions have been removed. You will need to cancel those transactions and copy and reinitiate those transactions with a user who will not be deleted. For more information on canceling and copying transactions, please see the **Online Activity Page** user guide.

Furthermore, if you delete a user role and a user is still assigned to that user role, that user will not be able to log in to AccessJFG until being assigned to a new role.

IMPORTANT INFORMATION

DELETING USERS

If you try to delete a user who currently has outstanding pending or recurring transactions, the user cannot be deleted. You will either need to wait for those transactions to process or cancel those transactions and copy and reinitiate those transactions with a user who will not be deleted. Please see the **Online Activity Page** user guide for more information on canceling and copying transactions.

DELETING USER ROLES

If you delete a User Role that a user within that role currently has outstanding pending or recurring transactions, those transactions will not process as scheduled as the permissions enabling those transactions have been removed. Similarly, if you *edit* a User Role and remove certain transaction permissions, any outstanding pending or recurring transactions of that type that were created by a user within that role will not process. Those transactions should be canceled and copied if they should be continued. Please see the **Online Activity Page** user guide for more information on canceling and copying transactions.

If you delete a user role and a user is still assigned to that user role, that user will not be able to log in to AccessJFG until being assigned to a new role.

Additional Resources and Support

- For additional resources, including “how-to” guides, please visit our online Client Resources page at:
  - » https://www.johnsonfinancialgroup.com/client-resources

- If further support is needed, please call our Treasury Management Support Center at 888.769.3796 or by email at tmsupport@johnsonfinancialgroup.com.