



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.

Click an account tile to view details and transaction history.

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ACCOUNTS

Available: \$15,822.79

Current: \$15,822.79

COMMERCIAL CKG W/INT **4277

Available Balance \$5,038.52

Current Balance \$5,038.52

COMMERCIAL CHECKING **7245

Available Balance \$3,872.84

Current Balance \$3,872.84

COMMERCIAL CKG W/INT **7757

Available Balance \$5,160.36

Current Balance \$5,160.36

INSTITUTIONAL MMKT **6030

Available Balance \$1,751.07

Current Balance \$1,751.07

LOANS

Current: \$1,752,987.79

FIXED COMMERCIAL 300200

Current Balance \$742,736.74

RLC VARIABLE 20

Current Balance

CD

Available: \$15,539.55

Current: \$15,539.55

BUSINESS REPO CD **0001

Available Balance \$15,539.55

Current Balance \$15,539.55

ACCOUNT SUMMARY

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

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

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User Management

Search Users

Add User

User	Email Address	Role	Status	Last login	
David Brent	dbrent@wernham-hogg.co.uk	Test 2	Active		
Kyle Kasbohm		Administrator	Active	6 minutes ago	
Test User		Unassigned	Active	15 minutes ago	

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

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User Details

Status

Active

Edit Status

PERSONAL DETAILS

First Name	Last Name	Email Address
David	Brent	dbrent@wernham-hogg.co.uk
Phone Country	Phone	
United States	(555)555-5555	

USER ROLE

Manage User Roles

Current Role

Test 2

Update Role

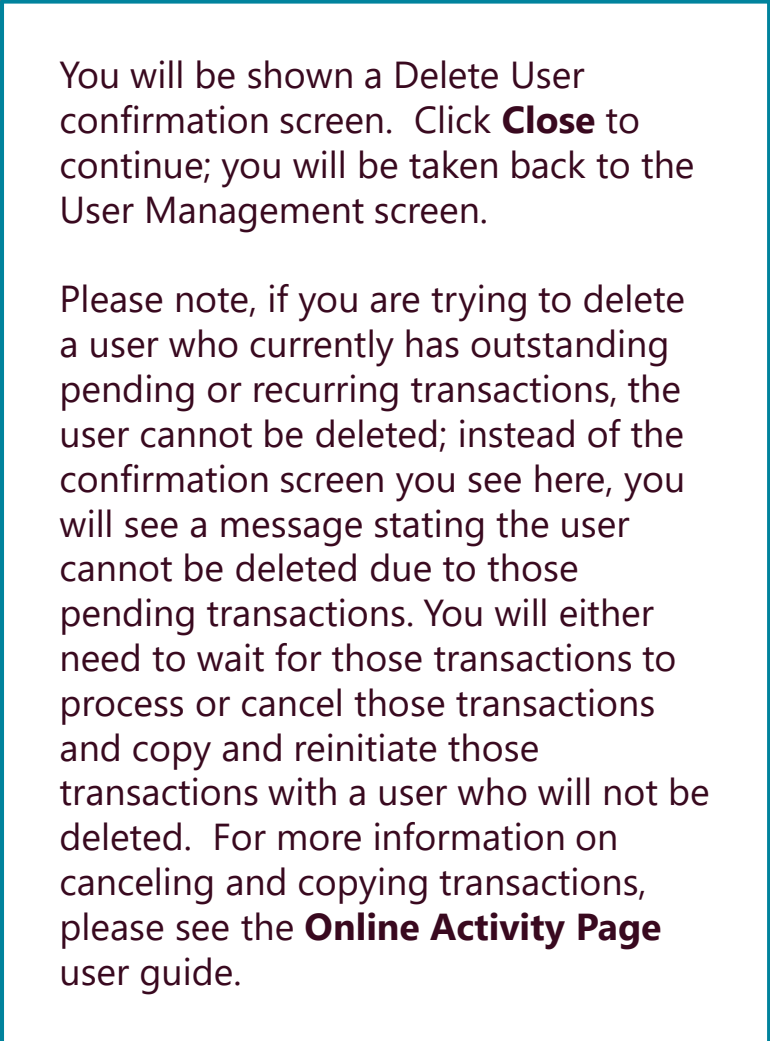
USER LOGINS

Login Name	Channel	Status	Last Logon	Actions
dbrent	Internet	Password Change Required		

Cancel

Delete

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



Click an account tile to view details and transaction history.

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Current Balance	
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ACCOUNT SUMMARY







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

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User Roles [?]

[Create Role](#)

USER ROLES

Name ^	Description	Users ^	
Administrator	None	1	  
Slough Regional Manager	None	None	  

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

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Use

Search

USER

Name

Admin

Slough Regional Manager

None

None



Create Role



Delete User Role

Are you sure you want to delete this user role?

Cancel

Delete User Role

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

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Good Morning, Kyle Kasbohm

Create Role

Use

Se

USER

Name

Admin

Close

×

Policy Deleted

Your policy has been deleted.

Close

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.

