



Managing Non-Corporate Users

Click an account tile to view details and transaction history.

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- Message Center 46
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- Locations & ATMs
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- Settings**
 - Account Preferences
 - Security Preferences
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 - Bill Pay Funding Account...
 - Text Enrollment
 - Update Contact Info
 - Users**
 - Accessibility
- Log Off

Home

ACCOUNTS1

Biz Growth Checking **4230	Available Balance	\$1,013.01	CKG **9809	Available Balance	\$3,903.02
	Current Balance	\$1,013.01		Current Balance	\$3,903.02

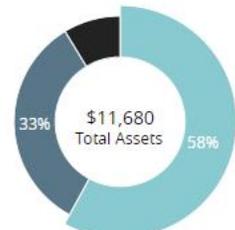
TEST

SMALL BUS PART- LOC 100001	Available Balance	\$24,034.02
	Current Balance	\$25,965.98

SAVINGS

SAV **4074	Available Balance	\$6,763.65
	Current Balance	\$6,763.65

ASSET SUMMARY



SAV	57.91%
****4074	
Available Balance	\$6,763.65
Current Balance	\$6,763.65
View Transactions	

- DepositPartner
- Positive Pay
- Business Gateway

You can access the Users menu by selecting **Users** under the **Settings** Menu.

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Users

- Accessibility
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User Management

Add User

User	Email Address	Last login	
Anisa Dunn		a month ago	
Carla Stirle		4 days ago	
Cassey Schulz		12 days ago	
Claire Pittsley		17 day	
Jeni Hurley			
Jon Wangerin			
Katie Heim		an hour ago	
Katie Heim 2			
Katie Moore			
Kyle Kasbohm		2 minutes ago	
Kyle Test			
Sarah Montemurro		13 days ago	

You add a user using the Add User button.

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New User Details

PERSONAL DETAILS

First Name	Last Name	Email Address
<input type="text" value="New"/>	<input type="text" value="User"/>	<input type="text" value="NewUser@Email.com"/>
Phone Country	Phone	
<input type="text" value="United States"/>	<input type="text" value="(888)769-3796"/>	

LOGIN DETAILS

User ID	Password	Confirm Password
<input type="text" value="NewUser"/>	<input type="password" value="....."/>	<input type="password" value="....."/>

Fill in the details of your new user; Password requirements will be listed when you click into the Password text field.

Click **Save New User Details** when finished.

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New
User Policy

Overview

Transaction
Type

Bill Payment

Check
Reorder

Stop
Payment

Transfer -
External

Transfer -
Internal



Save User

The user has been saved

[Close](#)

Account Approval
Limits

Draft Approve Cancel View

5	✓	✓	✓	Own
5	✓	✓	✓	Own
\$10,000.00	50 / \$10,000.00	50 / \$25,000.00	50 / \$10,000.00	✓ ✓ ✓ Own
\$999,999,999,999.99	999,999,999 / \$999,999,999,999.99	999,999,999 / \$999,999,999,999.99	999,999,999 / \$999,999,999,999.99	✓ ✓ ✓ Own

You will receive a confirmation that the user has been saved. Click **Close** to continue to the user entitlement screens.

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New User

User Policy ⓘ

- Overview
- Features
- Accounts

Transaction Type	Approval Limit	Per Day Approval Limits	Per Month Approval Limits	Per Account Approval Limits	Draft	Approve	Cancel	View
Bill Payment								
Check Reorder		5	5	5	✓	✓	✓	Own
Stop Payment		5	5	5	✓	✓	✓	Own
Transfer - External	\$10,000.00	50 / \$10,000.00	50 / \$25,000.00	50 / \$10,000.00	✓	✓	✓	Own
Transfer - Internal	\$999,999,999,999.99	999,999,999 / \$999,999,999,999.99	999,999,999 / \$999,999,999,999.99	999,999,999 / \$999,999,999,999.99	✓	✓	✓	Own

From the Overview tab, you can see all the transactions the user has access to and their Draft/Approval Entitlements. **Click a service to edit rights.**

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New User

User Policy ⓘ

- Overview
- Features
- Accounts

TRANSFER - EXTERNAL Change

Enabled

- Rights
- Approval Limits

Draft	✓	Can draft.
Approve	✓	Can approve.
Cancel	✓	Can cancel.
View Online Activity		Can view own transactions ▼

You can **Enable** or **Disable** the entire transaction category by using the **slider**.

You can set Rights to transactions on the **Rights** tab. Click the checkmarks or restricted icons to update rights for **Draft** (creating a transaction), **Approve** (authorizing a transaction), or **Cancel** (canceling an unprocessed transaction).

The **View Online Activity** dropdown menu allows you to adjust what transactions this user can see within the Online Activity Center, which tracks all transactions created via MyJFG.

- **Can view all transactions:** Allows user to see any transaction of this type.
- **Can view own transactions:** Allows user to see only his/her own transactions of this type.
- **Can view transactions to or from entitled accounts:** Allows users to see any transactions of this type associated with accounts he/she is entitled to view.
- **Cannot view any transactions:** user cannot view any transactions in Online Activity Center, including transactions he/she may have created.

New User

User Policy ⓘ

Overview
Features
Accounts

TRANSFER - EXTERNAL [Change](#)
Enabled

Rights

Approval Limits

Draft	✓	Can draft.
Approve	⊘	Cannot approve.
Cancel	✓	Can cancel.
View Online Activity	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="display: flex; justify-content: space-between; align-items: center; padding: 2px;"> Can view own transactions ▼ </div> <div style="padding: 2px;"> <p>Can view all transactions</p> <p style="background-color: #007bff; color: white; padding: 2px;">Can view own transactions</p> <p>Can view transactions to or from entitled accounts</p> <p>Cannot view any transactions</p> </div> </div>	

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New User

User Policy ⓘ

Save

Overview Features Accounts

TRANSFER - EXTERNAL [Change](#)

Enabled

Rights

Approval Limits

Maximum Amount ⓘ

Per transaction

\$ 10,000.00

Per Account Per Day

\$ 10,000.00

Per Day

\$ 10,000.00

Per Month

\$ 25,000.00

Maximum Count ⓘ

Per Account Per Day

50

Per Day

50

Per Month

50

You can also set Approval Limits for each transaction type by clicking the **Approval Limits** tab.

Maximum Amount refers to limits of dollar amounts.

Maximum Count refers to limits to number of transactions.

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New User

Save

User Policy ⓘ

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TRANSFER - EXTERNAL Change

Enabled

Choose a new transaction type

- Bill Payment
 - Check Reorder
 - Transfer - External**
 - Transfer - Internal
- Stop Payment

- Rights
- Approval Limits

Draft	✓	Can draft.
Approve	⊘	Cannot approve.
Cancel	✓	Can cancel.
View Online Activity	<input type="text" value="Can view own transactions"/>	

You can quickly switch between transaction types by clicking **Change**.

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New User

User Policy ⓘ

Save

- Overview
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Transaction Type	Approval Limit	Per Day Approval Limits	Per Month Approval Limits	Per Account Approval Limits	Draft	Approve	Cancel	View
Bill Payment								
Check Reorder		5	5	5	✓	✓	✓	Own
Stop Payment		5	5	5	✓	✓	✓	Own
Transfer - External	\$10,000.00	50 / \$10,000.00	50 / \$25,000.00	50 / \$10,000.00	✓	✓	✓	Own
Transfer-Internal	\$999,999,999,999.99	999,999,999 / \$999,999,999,999.99	999,999,999 / \$999,999,999,999.99	999,999,999 / \$999,999,999,999.99	⊘	⊘	⊘	No

Returning to the **Overview** tab, you will see any adjustments you made to entitled transactions. Any transactions you disabled will be crossed out and greyed out on the overview page.

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New User

User Policy ⓘ

Save

Overview Features Accounts

FEATURES ⓘ

RIGHTS

Access to all payment templates	Can view all recipients
Enable Centrix Positive Pay	Manage Recipients
Manage Users	

CUSTOM FEATURES

feature.item.FeatureGroupCustUser/AccountToAccount ✓	feature.item.FeatureGroupCustUser/AddExternalAccount ✓
feature.item.FeatureGroupCustUser/BaseAddressChange ✓	feature.item.FeatureGroupCustUser/LoanPayments ✓
feature.item.FeatureGroupCustUser/MemberToMemberTr... ✓	feature.item.FeatureGroupCustUser/Watch ✓

E-STATEMENT

Statements Access (Standard) ✓

You can set **Features** in a similar way. Features is a broader definition of what users can see or do.

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New User

User Policy ⓘ

Save

Overview Features **Accounts**

ACCOUNTS ⓘ

Number	Name	View <input checked="" type="checkbox"/>	Deposit <input checked="" type="checkbox"/>	Withdraw <input type="checkbox"/>
****4230	Biz Growth Checking	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
****9809	CKG	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
****4074	SAV	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
****100001	SMALL BUS PART- LOC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
xxx8789	External Checking	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
****1601	ESSENTIAL CHECKING	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
****8272	ESSENTIAL CHECKING	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

You can also set which **Accounts** the user can **View**, as well as if they can complete transactions that deposit into the account (**Deposit**) or pull money out of the account (**Withdraw**). These Deposit/Withdraw entitlements only refer to online banking functionality and do not grant an individual the ability to sign checks or make in-person withdrawals.

Click the icons under each column to turn on or off the capability for each account. A padlock icon indicates that function is not available for that account.

Click **Save** when finished.

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New

User Policy

Over

ACCOUNT

Num

****9809

CKG

****4074

SAV

****100001

SMALL BUS PART- LOC

xxx8789

External Checking

****1601

ESSENTIAL CHECKING

****8272

ESSENTIAL CHECKING



Policy Saved

Policy changes have been accepted.

Close

You will receive a confirmation that the user's policy has been saved. Click **Close**.

Click an account tile to view details and transaction history.

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Home

ACCOUNTS1

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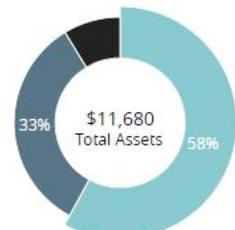
TEST

SMALL BUS PART- LOC 100001	Available Balance	\$24,034.02
	Current Balance	\$25,965.98

SAVINGS

SAV **4074	Available Balance	\$6,763.65
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ASSET SUMMARY



SAV	
****4074	57.91%
Available Balance	\$6,763.65
Current Balance	\$6,763.65
View Transactions	

- DepositPartner >
- Positive Pay >
- Business Gateway >

Return to the **Users** menu to update existing users.

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Account Preferences

Update Contact Info

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User Management

Search Users

Add User

User Email Address Last login

Anisa Dunn

a month ago



Carla Stirle

4 days ago



Cassey Schulz

12 days ago



Claire Pittsley

17 days ago



an hour ago



2 minutes ago



13 days ago



Click on the pencil icon to edit a user.

Katie Heim 2

Katie Moore

Kyle Kasbohm

Kyle Test

Sarah Montemurro

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User Details

Status

Active
[Edit Status](#)

PERSONAL DETAILS

First Name	Last Name	Email Address
New	User	NewUser@Email.com
Phone Country	Phone	
United States	(888)769-3796	

USER LOGINS

Login Name	Channel	Status	Last Login
NewUser	Internet	Password Change Required	

Click **Assign Rights** to edit user entitlements or **Delete** to delete a user.

Clicking **Assign Rights** will allow you to follow the same steps as entitling a new user.