

User Maintenance Guide

For Businesses



Bank of Marin

Business Users

Role templates have been created by Bank of Marin to reduce your setup requirements. However, Users can be managed manually. After selecting a User, you can make changes for each User's Transaction Type. Changes take effect the next time the User logs in.

This page includes the following tabs:

- | • Tab | Description |
|------------|--|
| • Overview | Displays a list of Transaction Types. Each enabled type must have at least one action. Transaction details include: <ul style="list-style-type: none">• Transaction Type• Per Transaction Approval Limit• Per Day Approval Limits (amount and count)• Per Month Approval Limits (amount and count)• Per Account Approval Limits (amount and count)• Draft Action• Approve Action• Cancel Action• Transaction View Capabilities |
| • Features | Displays a list of entitlements and third-party services enabled for the User. Examples include: <ul style="list-style-type: none">• Rights: Can add Users, manage templates, manage Recipients• Custom: Bill Pay administration, Bill Pay sub users, eStatement preferences |
| • Accounts | Displays a list of accounts and access rights. Access rights include: <ul style="list-style-type: none">• View: View balances and history for the account on the Home page, on the Account Details page, and in reports.• Deposit: Deposit funds into the account.• Withdraw: Withdraw funds from the account. |

Transaction Types

- You can manage each User's Transaction Type details by managing limits and other settings.
- Edit a User by changing the User's allowed features (Rights and Limits).

User Management Overview

Every User has an individual set of rights, including:

- Rights to create payments and external transfers of specific Transaction Types.
 - Limits on the transactions the User can approve.
 - Rights to access specific accounts.
 - Rights to features in online and mobile banking.
 - Transaction view capabilities.
- These rights control what each User can do in online and mobile banking. Administrators manage these rights by giving Users the permissions that they need to perform their jobs.
 - The rights, features, and accounts assigned to the User you create for your business are driven by your needs and factors such as the business structure, number of owners, and number of employees.

Business User Management

The Manage Users page lists all of the Business Account Users. You can view Users as cards in a grid or as a list.

Manage Users

Sort by ▾



Add User

The following information appears for each User:

- Name
- Email address
- The time since the User last logged in
- Account lock status

The Administrator would:

Click the edit icon  to view more User details. On the View User page, you can:

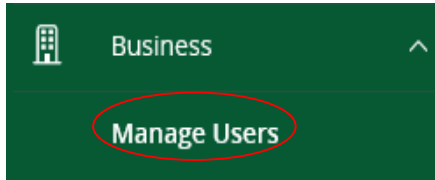
- See the phone number associated with the User
- Deactivate the User
- Assign rights
- Delete the User
- View the User's login name
- View the online banking channel last used by the User
- View the User's login status
- View the date of the User's last login

Adding a User and Configuring Rights

A User who has the Manage Users feature assigned (the Administrator) can create other Users on the Manage Users page.

To add a user,

- In the navigation menu, click or tap **Business > Manage Users**.



- Click or tap **Add User**. The New User page appears.

New User

First Name *	Last Name *	First Name should not exceed 25 characters.
<input type="text"/>	<input type="text"/>	Last Name should not exceed 50 characters.
Email Address *		User ID must be at least 10 characters long.
<input type="text"/>		User ID must be no more than 25 characters long.
Phone Country *	Phone *	Login ID contains invalid characters.
<input type="text" value="Select Country"/>	<input type="text"/>	Passwords do not match.
Login ID *		Password must be at least 8 characters long.
<input type="text"/>		Password can be no more than 35 characters long.
Password *	Confirm Password *	Password must contain a minimum of 1 numbers.
<input type="text"/>	<input type="text"/>	Password must contain a minimum of 1 lower case characters.
		Password must contain a minimum of 1 upper case characters.
		Password must contain a minimum of 1 special characters.

* - Indicates required field


Adding a User and Configuring Rights (continued)

- Do the following:
 - In the **First Name** and **Last Name** fields, enter names.
 - In the **E-Mail Address** field, enter a valid email address.
 - In the **Phone Country** drop-down list, select the country.
 - In the **Phone** field, enter a valid phone number.
 - In the **Login ID** field, enter a login name (min. 10 characters).
 - In the **Password** field, enter a default password, and re-enter it in the **Confirm Password** field.
 - Click or tap **Save**.
- Click or tap **Close**.

Editing User Rights

A User (Administrator) who has the Manage Users feature assigned can edit any User's rights. Changes to User rights take effect the next time the User logs in.

To edit User rights

- In the navigation menu, click or tap **Business > Manage Users**.
- Locate the User you want to edit by browsing or searching for the User. Click or tap the edit User icon. 
- Verify the login name of the User in the **Login Name** field, and click or tap **Assign Rights**.
- Configure the User rights and limits for each Transaction Type, the account features, and the account access.
- Click or tap **Save**.

Configuring Rights and Limits for Transaction Types

A User (Administrator) who has the Manage Users feature assigned can edit User rights and limits for Transaction Types

To view existing rights and limits for all Transaction Types

- On the View User page for a User, click or tap **Assign Rights**. The Overview tab of the User Policy page appears with a list of Transaction Types

To configure rights for Transaction Types on the User Policy page

- In the navigation menu, click or tap **Business > Manage Users**.
- Click or tap the User you want to edit and select **Assign Rights**.
- On the Overview tab of the User Policy page, click or tap the icons for **Draft**, **Approve**, **Cancel**, and **View** to assign rights to a Transaction Type.
- Click or tap **Save**.
- Click or tap **Close**.

tester test ⓘ

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								
Stop Payment		0	0	0	✓	✓	✓	ⓘ
Transfer - Internal	\$99,999,999,999.99	999,999,999 / \$99,999,999,999.99	999,999,999 / \$99,999,999,999.99	999,999,999 / \$99,999,999,999.99	✓	✓	✓	ⓘ

Configuring Feature Options

A User (Administrator) who has the Manage Users right assigned can edit User access to features. Features that are turned on are highlighted and contain a check box in the row.

To configure feature options

- On the View User page for a User, click or tap **Assign Rights**. The Overview tab of the User Rights page appears.
- Click or tap **Features**.

tester test
User Policy

Save ⓘ

Overview **Features** Accounts

FEATURES

RIGHTS

Manage Templates	Manage Users
Manage Recipients	Can view all recipients

CUSTOM FEATURES

Business Bill Pay Admin	Business Bill Pay Sub User
SDK: Estatement_Prefs ✓	

- Click or tap **Features** to assign to the User.
- Click or tap **Save**.
- On the success message, click or tap **Close**.

Configuring Account Access

A User (Administrator) who has the Manage Users right assigned can edit the access that other Users have to accounts.

To configure account access

- On the View User page for a User, click or tap **Assign Rights**.
- Click or tap **Accounts**.

tester test
User Policy

Save ⓘ

Overview Features **Accounts**

ACCOUNTS

Hide unassigned accounts


Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
xxx22203	Investment Account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
xxx99999	DEMAND DEPOSIT ACCOUNT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- For each account, click or tap the icon in each of the following columns to configure access:
 - **View**
 - **Deposit**
 - **Withdraw**
- Click or tap **Save**.
- On the success message, click or tap **OK**.

Deleting a User

When you delete a User, you do not delete any existing transactions that the User drafted or approved, including recurring transactions. Deletion is permanent, so use caution before deleting a User.

To delete a user

- In the navigation menu, click or tap **Business > Manage Users**.
- Locate the User that you want to delete. You can browse or search for the User. Click or tap the edit User icon. 
- Click or tap **Delete**.
- Click or tap **Yes** to verify the deletion.
- Click or tap **Close**.