

# User Administration

## Manage Users

Roll over Administration, under **Company Administrators**, select **Manage Users**.

## Edit Existing User

1. Click on the user ID of the user to edit.
2. Click the **Edit** link next to the area you wish to edit, or click **Delete User** to remove the user entirely.

## Create New User

1. Click **Create New User**.
2. Complete user information.

**Note: If user will receive text message alerts and/or out-of-band authentication texts, the phone number entered must be Mobile, Mobile2, or Other.**

3. Click **Continue**.  
(Recommended) Select **Copy User** to model new user after an existing one. Roles, services, and accounts may all be edited later, but copying an existing user saves time in the setup process.
4. Select the **User Role(s)**.
5. Click **Continue**.

Welcome Reports Transfers and Payments Account Services Administration

Profile Roles Services & Accounts Limits Verification

### New User - Roles

Select roles for this new user, and click "Continue." To save this new user as a draft to be completed at a later time, click the link "Save as Draft."

User: Mark Rogers (MROGERS) [Edit](#)

#### Copy Existing User (optional)

Do not copy user.  
 Copy user: [Select user](#)

#### User Roles (optional)

Allow this user to setup templates.  
(This entitles the user to template setup capabilities for only those services and accounts to which the user has been entitled.)

Allow this user to approve transactions.  
(This entitles the user to transmit capabilities for only those services to which the user has been entitled.)

Grant this user administration privileges.  
(This will allow the user to add, modify, copy and delete users, modify their roles, services and account access, rename accounts, and modify the number of approvers required for requests.)

[Continue](#) [Save as Draft](#)

How Do I... Terms FAQs

Continued...

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6. Add, Change, or Remove services for the user.
7. Click **Continue**.

Welcome Reports Transfers and Payments Account Services Administration

Profile Roles **Services & Accounts** Limits Verification

### New User – Services & Accounts

Select services and accounts for this new user and click "Continue." To save this new user as a draft to be completed at a later time, click the link "Save as Draft."

User: Mark Rogers (MROGERS) [Edit](#)

#### Services & Accounts (optional)

To enable a service and assign accounts, click the appropriate link. To disable all services and accounts, click "Clear all."

0 of 50 services enabled [Clear all](#)

Service	
ACH File Upload	<a href="#">Add</a>
ACH Positive Pay	<a href="#">Add</a>
ACH Reporting	<a href="#">Add</a>
Account Management	<a href="#">Add</a>
Bill Pay	<a href="#">Add</a>
CCD Collection	<a href="#">Add</a>
CCD Payment	<a href="#">Add</a>
CTX Collection	<a href="#">Add</a>
CTX Payment	<a href="#">Add</a>
Check Reorder	<a href="#">Add</a>
Child Support Payment	<a href="#">Add</a>
Deposit Account Reporting	<a href="#">Add</a>
Deposit Recon	<a href="#">Add</a>
Deposit Reporting	<a href="#">Add</a>
Escrow Account Reporting	<a href="#">Add</a>
Escrow Account Transfer	<a href="#">Add</a>
Federal Tax	<a href="#">Add</a>
File Download	<a href="#">Add</a>
Full Account Recon	<a href="#">Add</a>
IAT Collection	<a href="#">Add</a>

8. Set limits (if necessary).
9. Click **Continue**.
10. Review user information and make changes, if necessary.
11. Click **Submit**.