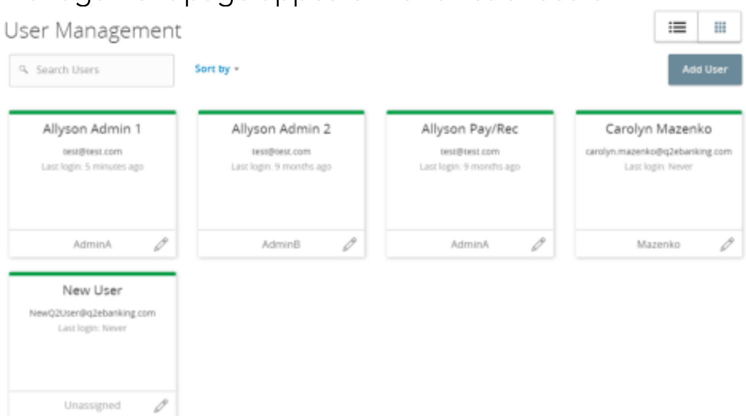
MANAGING AUTHORIZED USERS

Viewing existing users

The User Management page includes all users as cards in a grid or in a list.

To view existing users

1. In the navigation menu, click or tap **Manage Users > Add/Edit Users**. The User Management page appears with a list of users.



2. (Optional) Enter information in the search field to find more users.

Editing user rights

A user who has the Manage Users feature assigned can edit any user's rights. Changes to user rights take effect the next time that the user logs in.

To edit user rights

1. In the navigation menu, click or tap **Manage Users** > **Add/Edit Users**. The User Management page appears.
2. Locate the user you want to edit by browsing or searching for the user. Click or tap the edit user icon ( ). The View User page appears.
3. Verify the login name of the user in the **Login Name** field, and click or tap **Assign Rights**. The User Policy page appears.
4. Configure the user rights and limits for each Transaction Type, the account features, and the account access.
5. Click or tap **Save**.

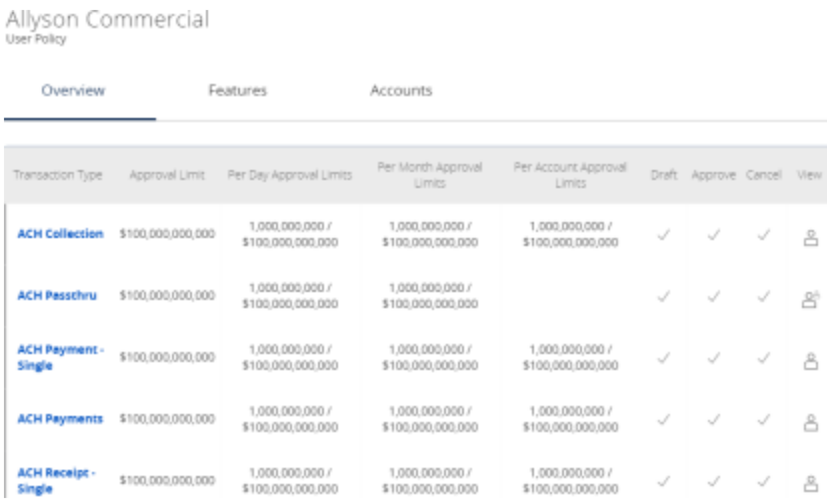
Configuring rights and limits for Transaction Types

A user who has the Manage Users feature assigned can edit user rights and limits for Transaction Types.

![FAIRWINDS Credit Union]

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.



Transaction Type	Approval Limit	Per Day Approval Limits	Per Month Approval Limits	Per Account Approval Limits	Draft	Approve	Cancel	View
ACH Collection	$100,000,000,000	1,000,000,000 / $100,000,000,000	1,000,000,000 / $100,000,000,000	1,000,000,000 / $100,000,000,000	✓	✓	✓	
ACH Passthru	$100,000,000,000	1,000,000,000 / $100,000,000,000	1,000,000,000 / $100,000,000,000		✓	✓	✓	
ACH Payment - Single	$100,000,000,000	1,000,000,000 / $100,000,000,000	1,000,000,000 / $100,000,000,000	1,000,000,000 / $100,000,000,000	✓	✓	✓	
ACH Payments	$100,000,000,000	1,000,000,000 / $100,000,000,000	1,000,000,000 / $100,000,000,000	1,000,000,000 / $100,000,000,000	✓	✓	✓	
ACH Receipt - Single	$100,000,000,000	1,000,000,000 / $100,000,000,000	1,000,000,000 / $100,000,000,000	1,000,000,000 / $100,000,000,000	✓	✓	✓	

To configure rights for Transaction Types on the User Policy page

1. In the navigation menu, click or tap **Manage Users** > **Add/Edit Users**. The User Management page appears.
2. Click or tap the User you want to edit and select **Assign Rights**.
3. 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.
4. Click or tap **Save**.
5. Click or tap **Close**.

Configuring feature options

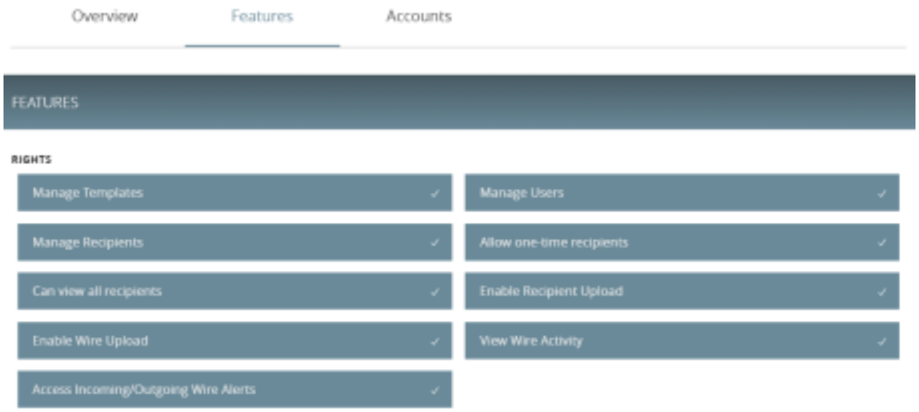
A user who has the Manage Users right assigned can edit user access to features. The features that appear depend on how we configure your account. Features that are turned on are highlighted and contain a check box in the row.

> Note: *FAIRWINDS* will manage subsidiaries on your behalf, the Manage Subsidiaries feature does not appear.

To configure feature options

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

2. Click or tap **Features**. The Features tab appears.



3. Click or tap features to assign to the user. These features may vary according to your configuration.

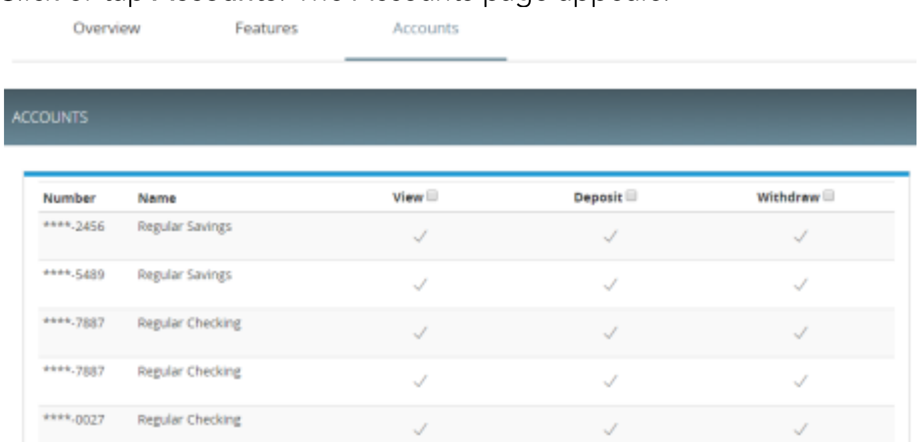
4. Click or tap **Save**.
5. On the success message, click or tap **Close**.

Configuring account access

A user who has the Manage Users right assigned can edit the access that other users have to accounts.

To configure account access

1. On the View User page for a user, click or tap **Assign Rights**. The User Policy page appears.
2. Click or tap **Accounts**. The Accounts page appears.



3. For each account, click or tap the icon in each of the following columns to configure access:
   - **View**
   - **Deposit**
   - **Withdraw**

4. Click or tap **Save**.
5. 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

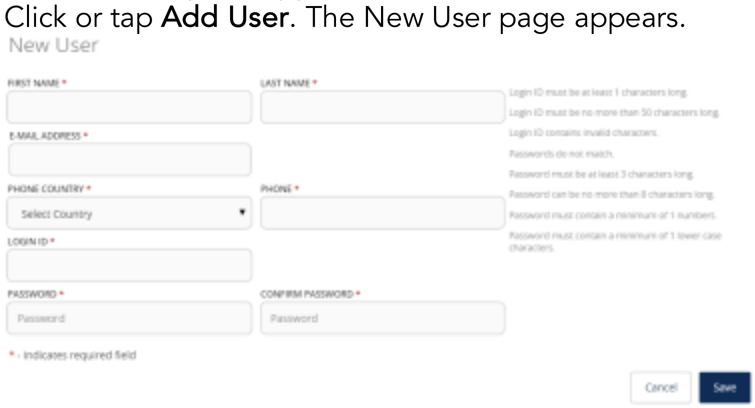
1. In the navigation menu, click or tap **Manage Users** >**Add/Edit Users**. The User Management page appears.
2. Locate the user that you want to delete. You can browse or search for the user. Click or tap the edit user icon (✎). The View User page appears.
3. Click or tap **Delete**.
4. Click or tap **Yes** to verify the deletion.
5. Click or tap **Close**.

Adding a user and configuring rights

A user who has the Manage Users feature assigned can create other users on the User Management page.

To add a user

1. In the navigation menu, click or tap **Manage Users** > **Add/Edit Users**. The User Management page appears.
2. Click or tap **Add User**. The New User page appears.

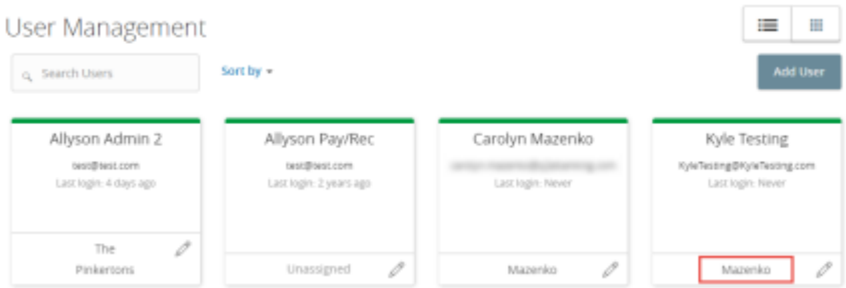


3. Do the following:
    1. In the **First Name** and **Last Name** fields, enter names.
    2. In the **E-Mail Address** field, enter a valid email address.
    3. In the **Phone Country** drop-down list, select the country.
    4. In the **Phone** field, enter a valid phone number.
    5. In the **Login ID** field, enter a login name.

    6. In the **User Role** drop-down list, select a role.
    7. In the **Password** field, enter a default password, and re-enter it in the **Confirm Password** field.
    8. Click or tap **Save**. The Save User page appears.
4. Click or tap **Close**. The User Management page appears.

To assign rights

1. In the navigation menu, click or tap **Manage Users** > **Add/Edit Roles**.
2. Locate the User Role to which you want to assign rights. Click or tap the edit icon (✎).
3. Click the User Role on the desired User.



4. Click or tap a **Transaction Type**.
5. Click or tap the **Rights** tab.
6. Do the following:
    1. Click or tap **Enable** to enable the Transaction Type.
    2. Click or tap the icons for **Draft**, **Approve**, **Cancel**, and **View Online Activity** to assign rights to the user.
7. (Optional) If the type is a financial transaction and the user can approve the type, click or tap the **Approval Limits** tab. Click or tap a limit, then enter the limit.
8. (Optional) Click or tap **Overview** and repeat steps 7-10 to assign additional Transaction Types to the user role.