

- 1. On the left hand menu item, under Administration select **User Management.**
- 2. Select Add User to initiate the process of creating a new user.

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	ជ	Accounts		User Management					2
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	≡	Activity Center		Search Users					Add User
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- 3. Enter New User Details and all fields are mandatory:
  - First Name
  - Last Name
  - Email Address
  - Phone Country
  - Phone
  - Login ID
  - Password
  - Confirm Password
- 4. Click the drop down menu for **User Role**. Choose from the list of user roles to assign to the individual user.
  - Note: Refer to User Role guide if needed
- 5. Click the Save button.

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	eStatements		Password *	Confirm Password *					
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	Company Settings								
	User Management		First Name should not exceed 25 characters.						
			Last Name should not exceed 50 characters.						
	User Roles		Login ID must be between 1 and 50 characters.						
-83-	Settings & Security	~	Login ID contains invalid characters.						
-0-			Passwords do not match.						
Ξ	Forms	$\sim$	Must be between 10 and 99 characters						
0	Locations		Must contain at least 1 number						
$\vee$			Password must contain a minimum of 1 lower case characters						
?	Help		Preparent must contain a minimum of 1 upper case						
-			characters.						
Ð	Log Off		Password must contain a minimum of 1 special						
			characters.						



## ADMIN GUIDE: CREATING A NEW USER

6. A confirmation pop up will display. Click the **Close** button.



- 7. To confirm the user was properly created, navigate to **User Management** and locate the individual user.
- 8. To activate the user, contact Treasury Support at 833.635.9291. The Credential ID is needed if the user has a virtual token.

Note: If a user's access is changed or deleted, the templates and/or future/recurring payments created by the user will no longer process. For more details, please contact Treasury Support at 833.635.9291 or treasury.support@ibtx.com.

F	FINANCIAL Welcome back.								
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	Mailbox								
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	Pay & Transfer	~	User 🔺	Email Address 🗠	Role	Status 🗠	Last login 🗠		
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