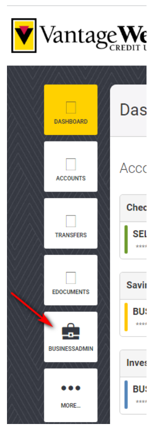
REGISTER USERS AND SET PERMISSIONS

Note: *Cash Management Administrators will establish users and set permissions for these users by taking the following steps.*

Business Admin

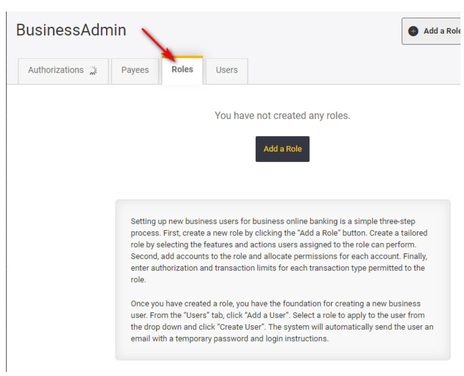
Once logged in navigate to the **Business Admin** tab.



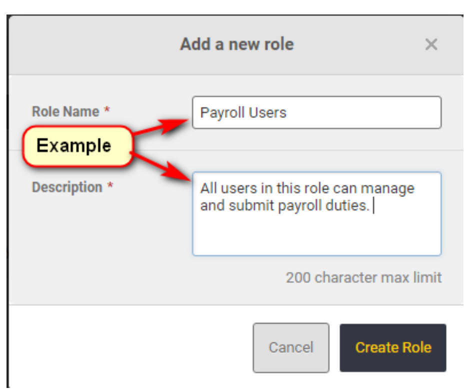
Roles

Navigate to **Roles** first to establish roles that will be used to assign to your users.

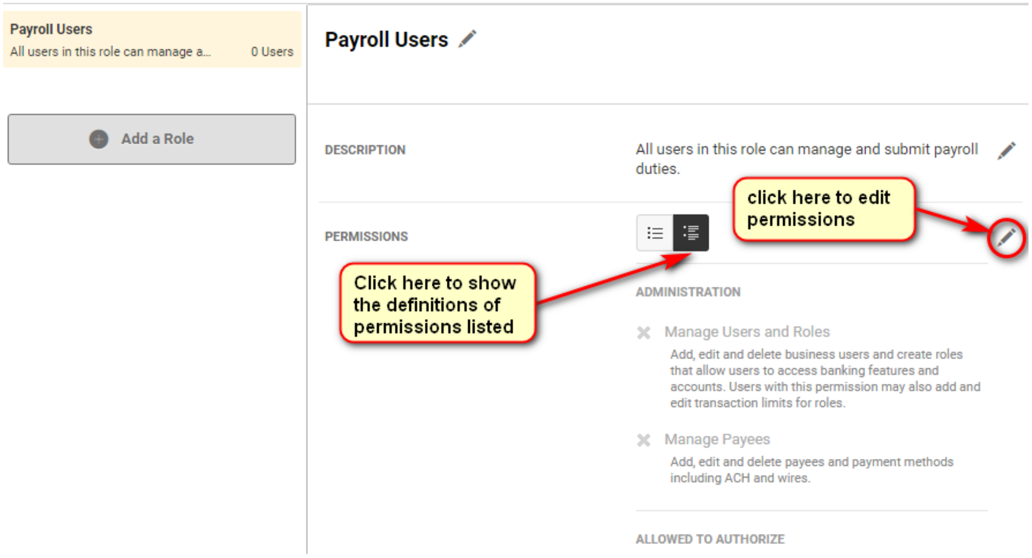
- Click **Add a Role**



- Name your role and list the description for this role. You will have the ability to assign multiple users to a role if you choose.



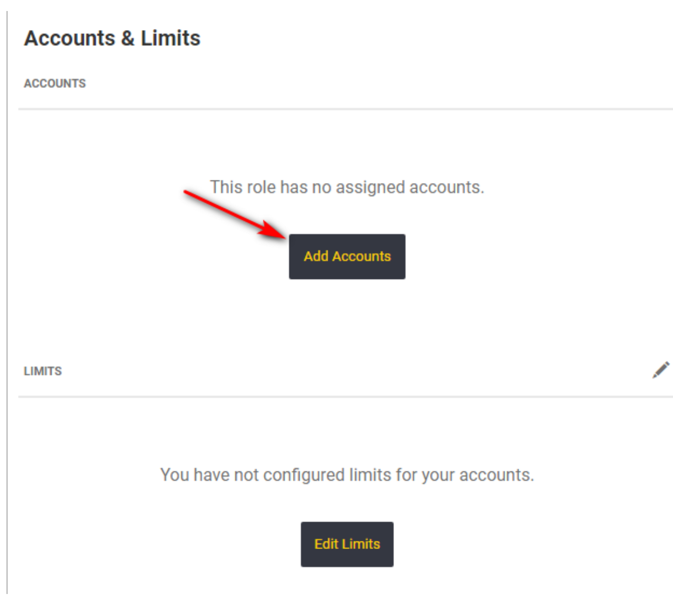
- Establish the **Permissions** for each role.
- **Please note that all users that are assigned to a specific role will have the same permissions. For users that need different permissions, assign each user a different role.**



- Once you have selected all of the requested permissions make sure to **Save Changes**.

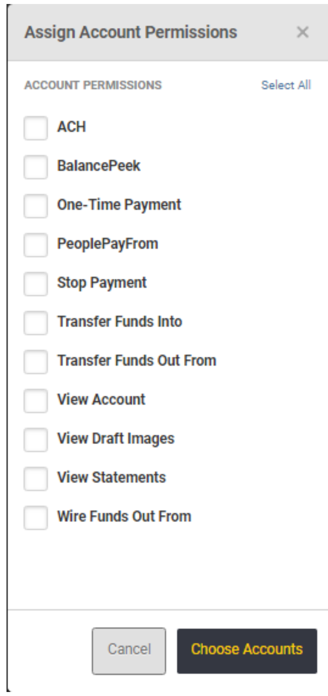
Accounts & Limits

- Assign accounts to this role.

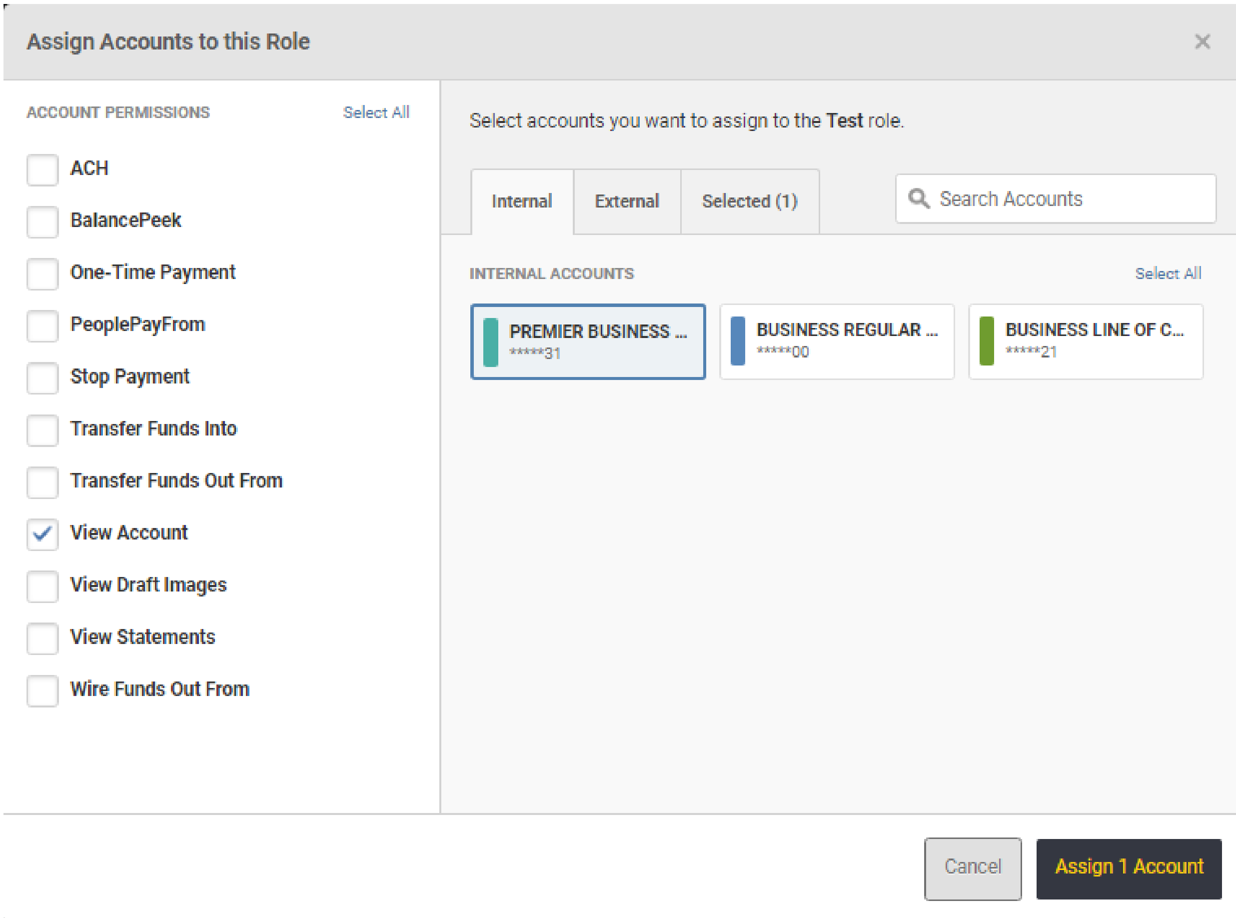


REGISTER USERS AND SET PERMISSIONS

- Select permissions. Click **Choose Accounts**.



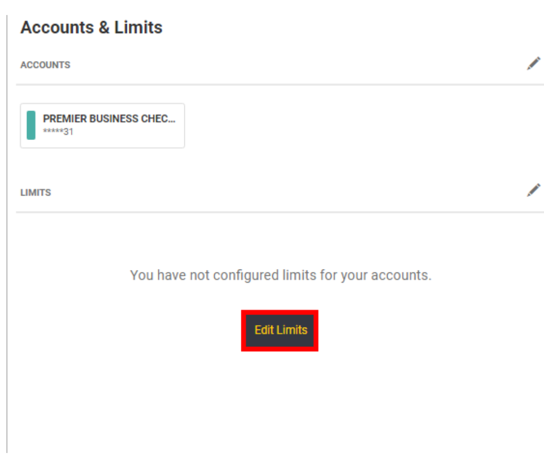
- Select account(s) for assignment. Click **Assign Account(s)**.



- Confirmation message will appear at top of web page.

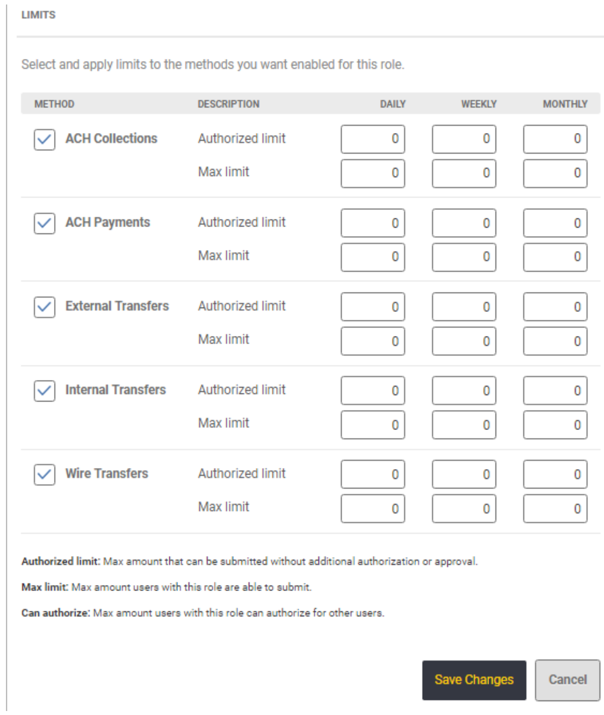
Limits

- Click **Edit Limits**.



- Select **Method**. Input desired daily, weekly, and monthly, limits. Click **Save Changes**.

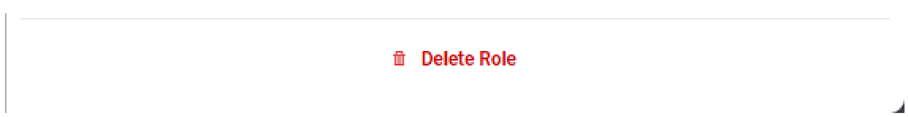
Note: The role must have permissions selected in order for limits to take effect.



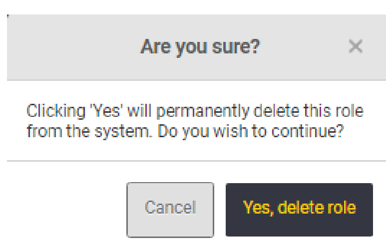
- Confirmation message will appear at top of web page.

Delete Role

- Click **Delete Role**.



- Confirm request to delete role.

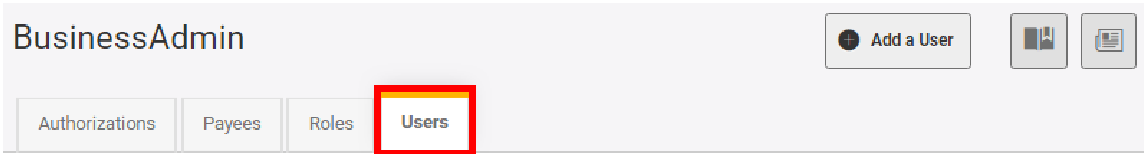


- Confirmation message will appear at the top of the web page.

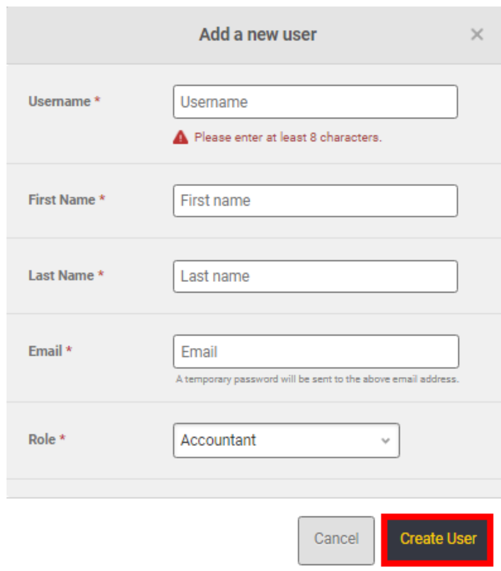
REGISTER USERS AND SET PERMISSIONS

Users

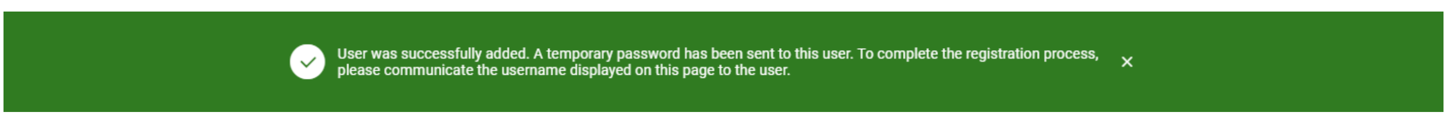
- Navigate to “Users” tab in Business Admin. Select **Add a User**.



- Enter required information for User. Click **Create User**.

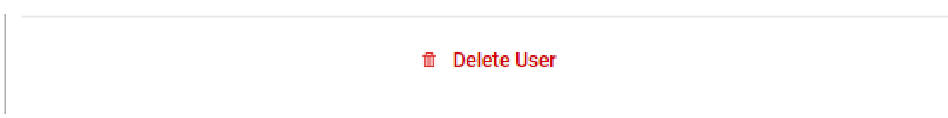


- Confirmation message will appear at the top of the web page.
  Note: A temporary password will be emailed to the newly created user. Please provide the username to the user to allow access.



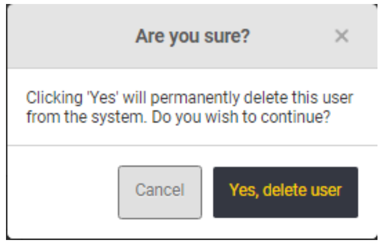
Delete User

- Click **Delete User**.



- Confirm request to delete user.

REGISTER USERS AND SET PERMISSIONS



- Confirmation message will appear at the top of the web page.