Create/Edit Role Permissions – Basic

Please see the instructions for Adding a Role before completing this process.

Creating Role Permissions allows you to control what your users are capable of doing within your account. See the table at the end of this document for a full list of permission descriptions.

Add a Role

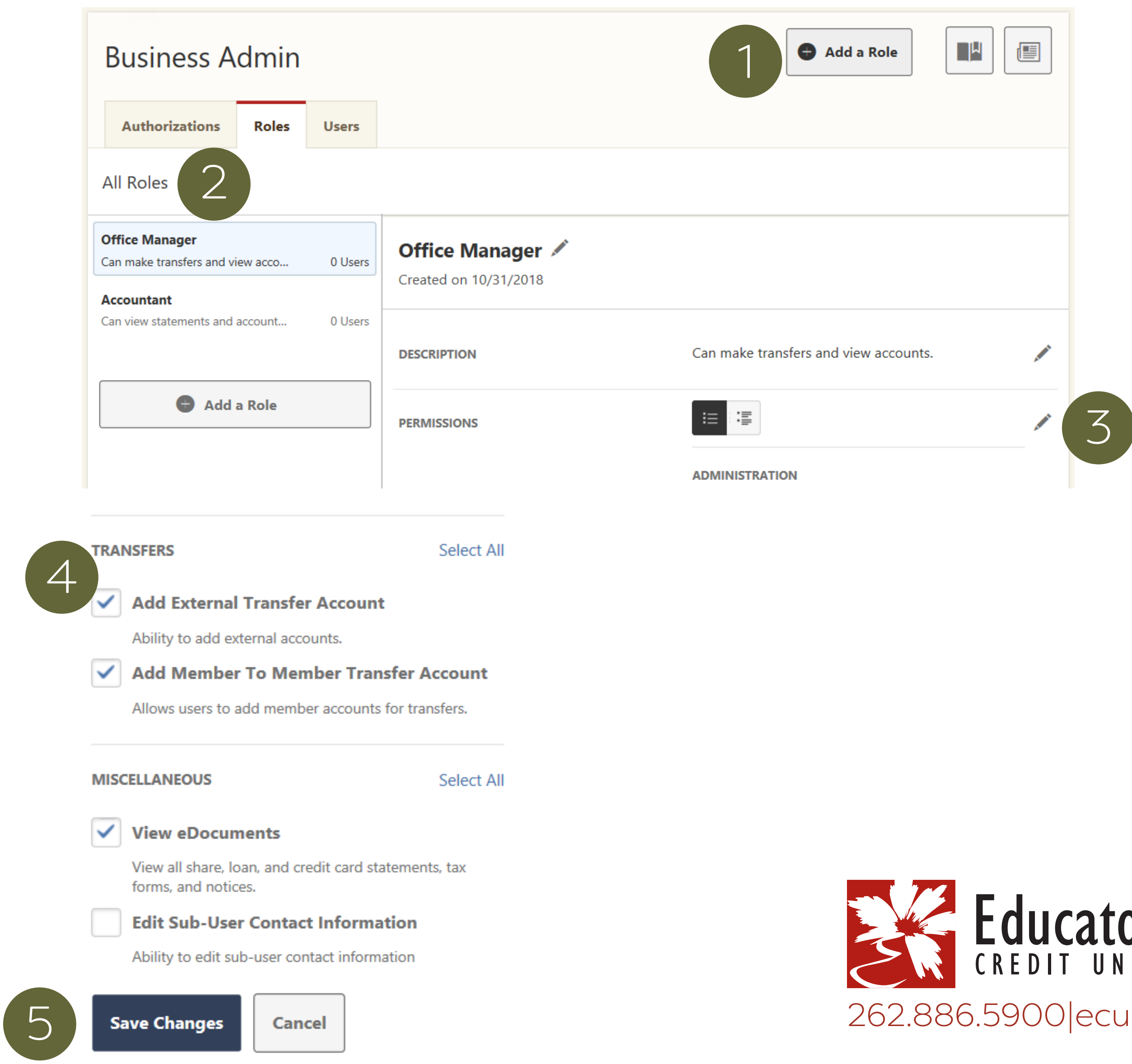
1) Complete the Instructions to “Add a Role.”

2) Click the role you would like to change to create/edit permissions.

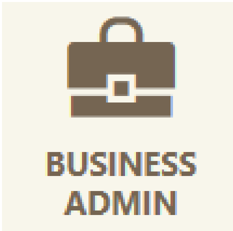
3) Select the pencil icon next to Permissions.

4) Check the box next to each permission you wish to assign (Click the icon for a description of each option)

5) Click “Save Changes” to apply permissions.



Create/Edit Role Permissions – Basic – Continued



Accounts & Limits

6) Click "Add Accounts" in the Accounts & Limits section.

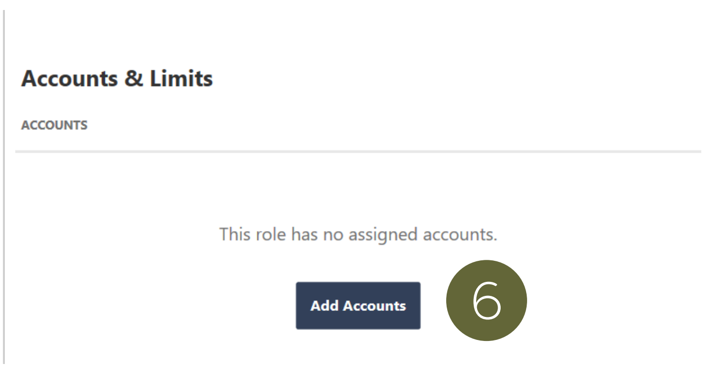
7) Choose account level permissions by checking the box near the permission.

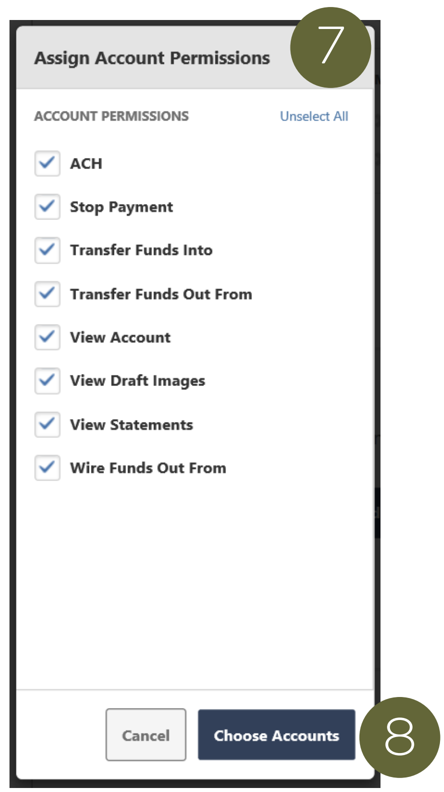
8) Click "Choose Accounts."

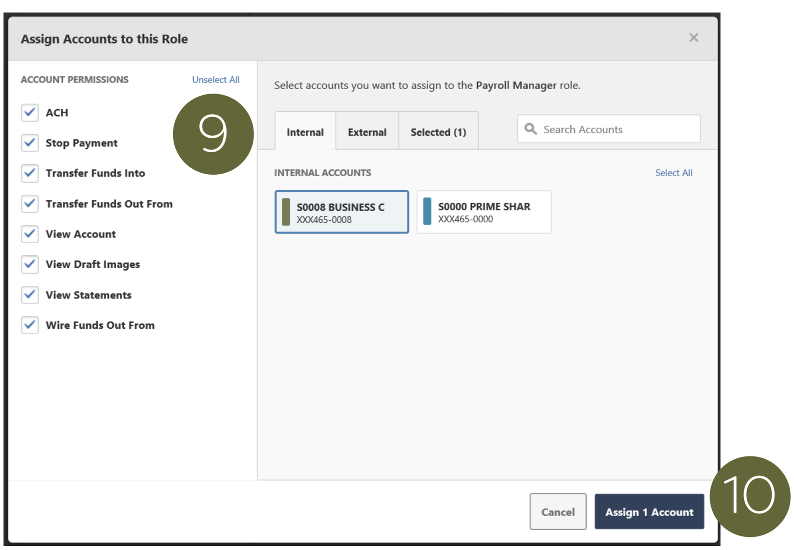
9) Click the Accounts you want to apply the permissions to.

10) Click "Assign Accounts" to complete the process.

Note: To add, adjust or remove accounts, select the pencil icon next to Accounts and Limits within the role. If you open a new share after set up, don't forget to adjust this section.







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Create/Edit Role Permissions – Basic – Continued

BUSINESS ADMIN

Limits

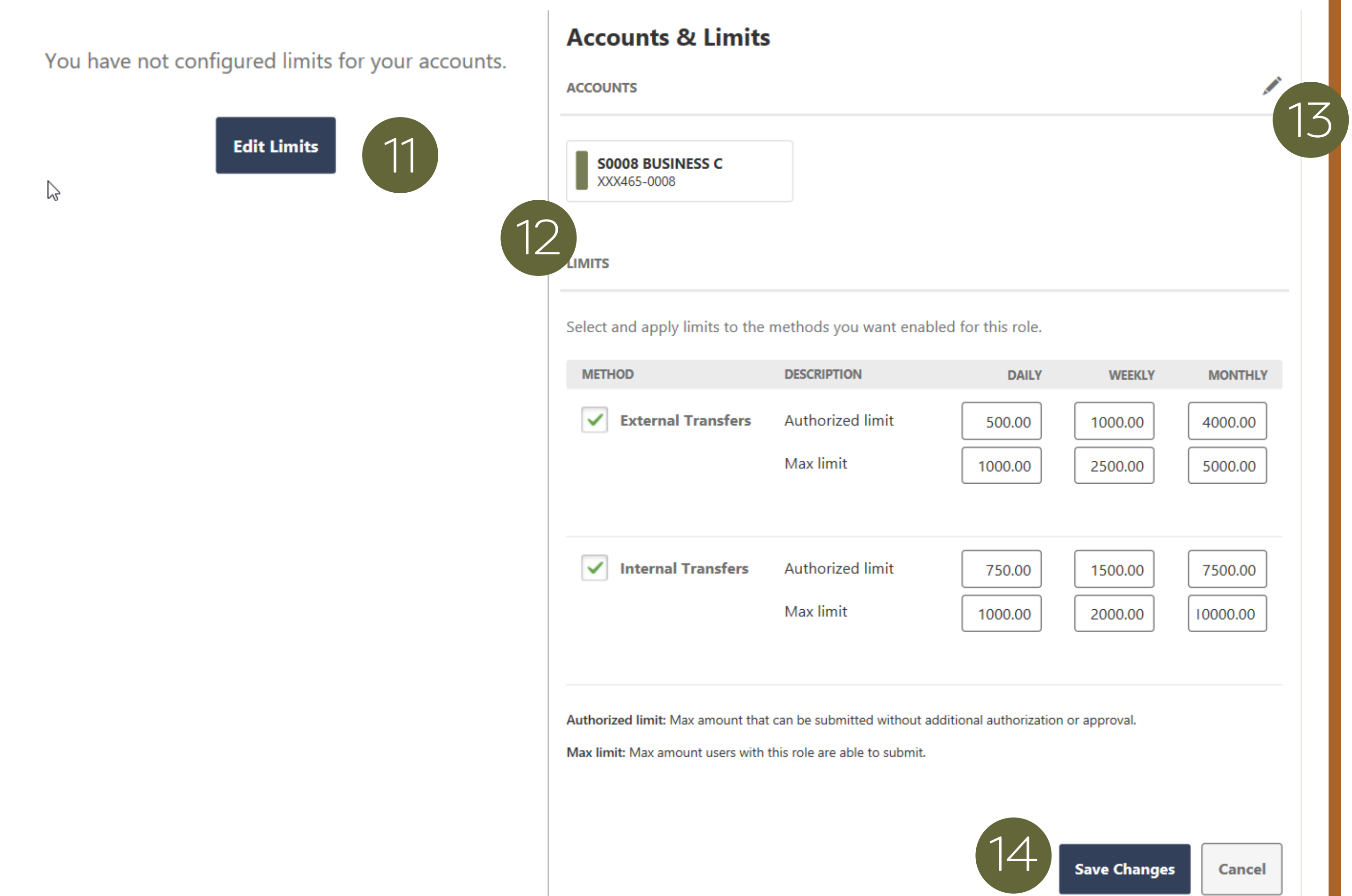
11) Click "Edit Limits."

12) Click to place a check mark next to the method of transfer you would like to authorize.

13) Enter "Daily," "Weekly," and "Monthly" authorized and maximum limits.

14) Click "Save Changes" to complete the process.

Note: Authorized limits are limits that your user will be able to perform independently on your behalf without an approval. Maximum limits are the amounts that your user can schedule, but you will need to approve the transfer within 24 hours. Limits for external and internal transfers can be different. Daily, Weekly and Monthly limits must be set progressively higher.



Permission	Description
Allowed to Authorize	
Transfers	Authorize internal and external account transfers for release to your financial institution.
Bill Pay	
Allowed to Pay Bills	Permits users to access bill pay services.
Transfers	
Add External Transfer Account	Ability to add external accounts.
Add Member to Member Transfers	Allows users to add member accounts for transfers.
Miscellaneous	
View eDocuments	View all share, loan, and credit card statements, tax forms, and notices.
Edit Sub-User Contact Information	Ability to edit sub-user contact information.