

Add New User/View User Permissions

- From the Administration Menu Select the Company Admin Option
- Select the Create a New User Link
- Accept the default of Create New User on the following screen by selecting the Next button

Users [Create a New User](#)

| <u>Username</u> | <u>Last Name</u> | <u>First Name</u> | <u>Administrator</u> | <u>Locked</u> | |
|-----------------|------------------|-------------------|----------------------|---------------|----------------------|
| testuser2 | Carlson | Robert | No | No | View |
| tommyj | User | tommy | Yes | No | View |

Select View to review an existing user permissions

Add New User

- Fill in all required information on the Create User screen, The Security Question & Answer are currently not utilized

Create User

Salutation

(Mr.,Mrs.,etc.)

First Name **

Middle Name

Last Name **

Suffix

(Jr.,Sr.,etc.)

Address Line 1 **

Address Line 2

Address Line 3

City **

State **

Postal Code **

Country *

Tax ID **

Date of Birth **



Online Banking Guide for Commercial Customers

Add New User/View User Permissions

Rhinebeck Bank Sign Off

Accounts ▾ Transfers ▾ Positive Payment ▾ Administration ▾ Customer Service ▾

Manage User PRINT

[Company Admin](#)

Username
tommyk

Address
Test 1
2 Jefferson Plaza
Poughkeepsie, NY 12601

[Modify](#)
[Change Password](#)
[Lock User](#)
 Reset Failed Logins
 Clear Password Reset Failures
 Reset PassMark
 SSO User Info

Accounts

| Account Number | Account Name | Account Type | Account Reporting | Information Reporting | Account Transfer | Dynamic Transfers | External Transfer | ACH | Wire Transfer | Bill Pay | Positive Pay | Stop Pay | Alerts | Services |
|----------------|---------------|--------------|------------------------|------------------------|------------------|-------------------|-------------------|-----|---------------|----------|--------------|----------|--------|----------|
| 1292 | Checking-1292 | Checking | Access | Limits | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

All options available for selection will be hyperlinks:

Important Note: Access & Limits must be established for each account listed.

Access – review all security settings for the individual user. This is where you will establish access to Account Transfers, ACH , Wires etc.

Limits– review all limits set for the individual user, This is where you will establish limits for Account Transfers, ACH File Limits, Wire Transfer Limits



Add New User/View User Permissions

The Manage User Access screen will have several tabs to go through. Check all functions as needed for each user. There are several more levels of control available. Please review carefully.

Account Transfer

[Account Reporting](#)
[Information Reporting](#)
[Account Transfer](#)
[Dynamic Transfers](#)
[External Transfer](#)
[ACH](#)
[Wire Transfer](#)
[Bill Pay](#)
[Positive Pay](#)
[Stop Pay](#)
[Alerts](#)
[Services](#)

| Account Transfer | Recurring Transfer | Transfer Template |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Check All Uncheck All | Check All Uncheck All | Check All Uncheck All |
| <input checked="" type="checkbox"/> Approve Transfer <input checked="" type="checkbox"/> Cancel Transfer <input checked="" type="checkbox"/> Create Transfer From <input checked="" type="checkbox"/> Create Transfer To <input checked="" type="checkbox"/> Modify Transfer <input checked="" type="checkbox"/> No Transfer Dual Control <input checked="" type="checkbox"/> Release Transfer <input checked="" type="checkbox"/> View Transfer | <input checked="" type="checkbox"/> Approve Recurring Transfer <input checked="" type="checkbox"/> Cancel Recurring Transfer <input checked="" type="checkbox"/> Create Recurring Transfer From <input checked="" type="checkbox"/> Create Recurring Transfer To <input checked="" type="checkbox"/> Modify Recurring Transfer <input checked="" type="checkbox"/> No Recurring Transfer Dual Control <input checked="" type="checkbox"/> Release Recurring Transfer <input checked="" type="checkbox"/> View Recurring Transfer | <input checked="" type="checkbox"/> Approve Transfer Template <input checked="" type="checkbox"/> Cancel Transfer Template <input checked="" type="checkbox"/> Create Transfer Template From <input checked="" type="checkbox"/> Create Transfer Template To <input checked="" type="checkbox"/> Modify Transfer Template <input checked="" type="checkbox"/> No Transfer Template Dual Control <input checked="" type="checkbox"/> Release Transfer Template <input checked="" type="checkbox"/> View Transfer Template |

Add New User/View User Permissions

The Manage User Limits screen will have several tabs to go through. Apply user limits for each function.

Account Transfer

[Account Transfer](#)
[External Transfer](#)
[Recurring Transfers](#)
[ACH Batch](#)
[Recurring ACH](#)
[Wire Transfer](#)
[Recurring Wire Transfer](#)

| Transaction Limits | Min | Max | Daily Limits | Max | Weekly Limits | Max |
|--------------------|-----------------------------------|----------------------|---------------|----------------------|---------------|----------------------|
| Transfer From | <input type="text" value="0.01"/> | <input type="text"/> | Transfer From | <input type="text"/> | Transfer From | <input type="text"/> |
| Approve | <input type="text" value="0.01"/> | <input type="text"/> | Approve | <input type="text"/> | Approve | <input type="text"/> |
| Modify | <input type="text" value="0.01"/> | <input type="text"/> | Modify | <input type="text"/> | Modify | <input type="text"/> |
| Release | <input type="text" value="0.01"/> | <input type="text"/> | Release | <input type="text"/> | Release | <input type="text"/> |

| Monthly Limits | Max | Rolling Limits | Max | Rolling Days |
|----------------|----------------------|----------------|----------------------|----------------------|
| Transfer From | <input type="text"/> | Transfer From | <input type="text"/> | <input type="text"/> |
| Approve | <input type="text"/> | Approve | <input type="text"/> | <input type="text"/> |
| Modify | <input type="text"/> | Modify | <input type="text"/> | <input type="text"/> |
| Release | <input type="text"/> | Release | <input type="text"/> | <input type="text"/> |