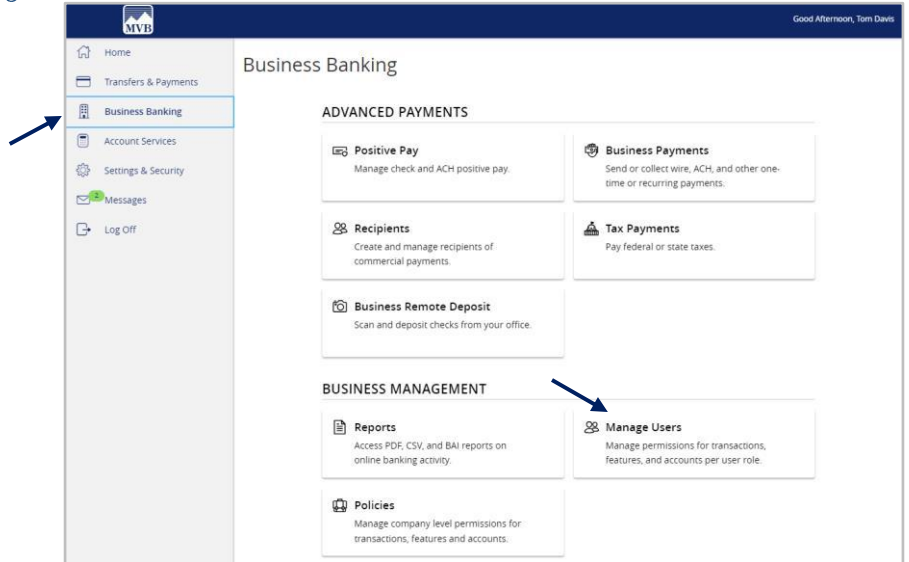




NOTE: User Roles are created to control feature entitlements and dollar limits for one or more company users.

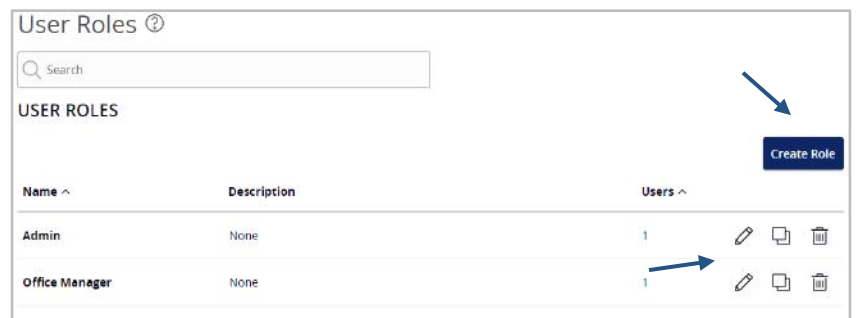
1. Select the 'Business Banking' menu, then select 'Manage Users'.



2. Click on 'Create Role' to create a new user role.

NOTE: Three actions can be performed on an existing User Role.

- a) Select the pencil icon to edit the user role.
- b) Select the double paper icon to copy the user role.
- c) Select the trash bin to delete the user role.



Questions? Please contact Client Support at 1-844-682-2265 or ClientSupport@MVBBanking.com.



3. Select a transaction type that you would like to set parameters around by clicking on the transaction name.
4. Now select 'Allowed Actions'.

The screenshot shows the 'User Roles > Admin' interface. The 'Transactions' tab is selected. On the left, a list of transaction types is shown: ACH Batch, ACH Collection, Domestic Wire, EFTPS, and Funds Transfer. The 'ACH BATCH' transaction type is selected, and its details are shown on the right. The 'Allowed Actions' tab is active, and the 'Approval Limits' table is visible.

	Maximum Amount	Maximum Count
Per Transaction	\$ 5.00	
Daily Per Account	\$ 5.00	99
Daily	\$ 5.00	99
Monthly	\$ 50.00	999

Allowed Actions

NOTE: One or multiple levels may be set up to establish general or specific user limitations.

5. To specify the allowed operation(s) for the selected transaction type, click the vertical dot icon and select 'Edit'.

The screenshot shows the 'User Roles > Admin' interface. The 'Transactions' tab is selected. On the left, a list of transaction types is shown: ACH Batch, ACH Collection, Domestic Wire, EFTPS, and Funds Transfer. The 'ACH BATCH' transaction type is selected, and its details are shown on the right. The 'Allowed Actions' tab is active, and the 'POLICY TESTER' section is visible. A dropdown menu is open, showing options: Show Details, Edit, and Delete.

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Operations

6. 'Draft' allows a user to initiate a transaction.

'Draft Restricted' allows a user to only access an assigned ACH or wire template. It does not allow a user to edit exiting templates or add new templates. One-time payments and recipient maintenance within existing templates are also not allowed.

'Approve' allows a user to authorize a transaction.

'Cancel' allows a user to cancel a drafted or authorized transaction.

Edit Allowed Action

Allows **ACH Batch** transaction for **any amount**

Operations

Draft
 Draft Restricted
 Approve
 Cancel

Amount

7. Select the 'Any allowable amount' option or 'Specific Amount' to enter the amount for the allowed action.

Amount

Any allowable amount

Specific Amount

Subsidiaries

8. Select the 'Any allowed subsidiaries' option or choose 'Select specific subsidiaries' to view the subsidiary or subsidiaries allowed for this transaction type. This step applies only to organizations with more than one Tax ID number.

Subsidiaries

Any allowed subsidiaries (1) **Select specific subsidiaries**

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Accounts

9. Select the 'Any allowed accounts' option or choose 'Select specific accounts' to specify the account(s) allowed for this transaction type.

Accounts

Any allowed account (2) **Select specific account(s)**

Draft Hours

10. The 'Draft Hours' option allows you to restrict hours and days of the week when transactions can be drafted.

Draft Hours

Any

+ Add Draft Hours

11. Select either PPD or CCD

12. Select 'Submit'.

Draft Hours

Any

+ Add Draft Hours

SEC Codes

Any

PPD CCD

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Rights

13. On the Rights tab, select the appropriate right for the user role's ability to view transactions in the 'Activity Center'.

All: View transactions initiated by any user within the company

Role: View transactions initiated by users with the same role

Account: View online activity of accounts the user has access to

Own: View only your own transactions

None: Cannot view transactions

Approval Limits

14. Select the 'Approval Limits' tab to view and modify the dollar and count limits assigned by Boston Private.

15. Repeat the previous steps for each transaction type.

	Maximum Amount	Maximum Count
Per Transaction	\$ 50,000.00	
Daily Per Account	\$ 50,000.00	1000
Daily	\$ 50,000.00	1000
Monthly	\$ 50,000.00	1000

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Features

16. Select the 'Features' tab to view and modify the non-transactional features. Select features you wish to enable or disable.

User Roles > Admin Delete Save

User Role Policy ⓘ

Transactions **Features** Accounts

FEATURES ⓘ

RIGHTS

- Access Incoming/Outgoing Wire Alerts
- Access to all payment templates
- Allow one-time recipients
- Can view all recipients
- Enable Centrix Postive Pay
- Manage Recipients
- Manage Users
- Recipient upload from batch
- View Wire Activity
- Wire upload from batch (requires Multi-Wire)

CUSTOM FEATURES

- Address Management
- Card Management

Accounts

17. Select the 'Accounts' tab to view and modify the account entitlements by selecting the checkmark or circle with a slash under 'View', 'Deposit' or 'Withdraw'.

18. Save the User Role by selecting the 'Save' button.

User Roles > Admin Delete Save

User Role Policy ⓘ

Transactions Features **Accounts**

ACCOUNTS ⓘ

Number	Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>	Labels
4837	FOUNDATION CHECKING	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
0356	COMMERCIAL LOC 360	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
4495	STATEMENT SAVINGS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Delete Save

Questions? Please contact Client Support at 1-844-682-2265 or ClientSupport@MVBBanking.com.