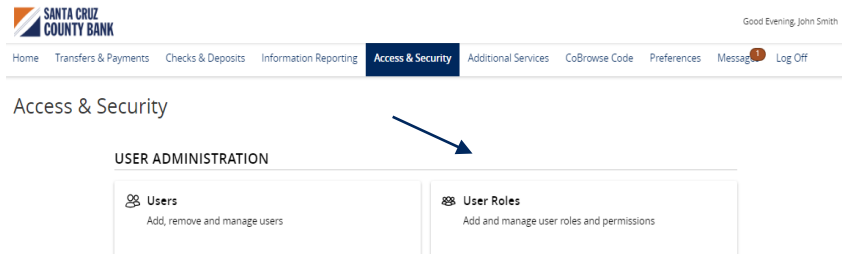


NOTE: User Roles are created to control feature entitlements and dollar limits for one or more company users.

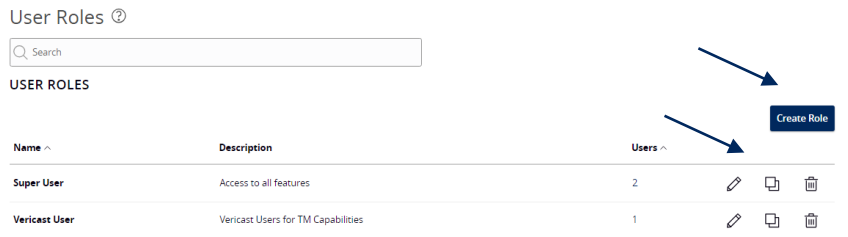
1. Select the 'Access & Security' menu, then select 'Users Roles'.



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.



User Roles Guide

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 > Sample' configuration page. It has tabs for 'Transactions', 'Features', and 'Accounts'. Under 'Transactions', there is a 'Transaction Filter' dropdown and a 'Filter' section with 'All', 'Enabled', and 'Disabled' options. A list of transaction types is shown on the left, with 'ACH Batch' selected. An arrow points from the 'ACH Batch' item in the list to the 'ACH BATCH' configuration card on the right. This card has an 'Enabled' toggle and a 'Rights Allowed Actions' section. Below this is an 'Approval Limits' table.

	Maximum Amount	Maximum Count
Per Transaction	\$ 999,999,999.99	
Daily Per Account	\$ 999,999,999.99	999999999
Daily	\$ 999,999,999.99	999999999
Monthly	\$ 999,999,999.99	999999999

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'.

This screenshot shows the 'Allowed Actions' configuration for the 'ACH BATCH' transaction type. It includes a search bar, a filter dropdown set to 'All', and a search input field. A blue 'Add Allowed Action' button is visible. Below, a list of allowed actions is shown. One action is highlighted: 'Allows ACH Batch transaction for any amount'. An arrow points from this action to a vertical ellipsis menu that contains 'Show Details', 'Edit', and 'Delete' options.

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 existing 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.

Operations

Draft 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**

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 (0) **Select specific account(s)**

Draft Hours

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

Rights

- 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

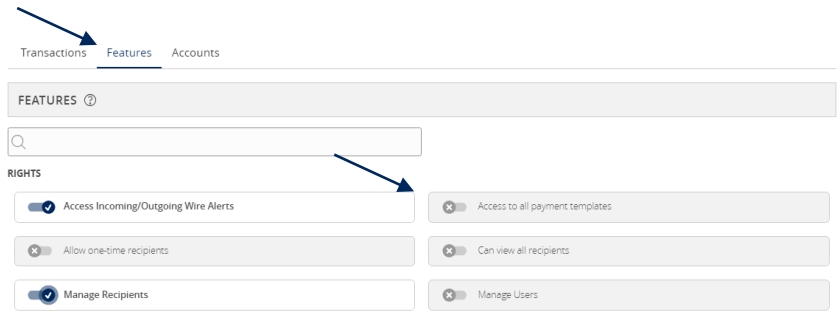
Approval Limits

- Select the 'Approval Limits' tab to view and modify the dollar and count limits assigned by Boston Private.
- Repeat the previous steps for each transaction type.

	Maximum Amount	Maximum Count
Per Transaction	\$ 999,999,999,999.99	
Daily Per Account	\$ 999,999,999,999.99	999999999
Daily	\$ 999,999,999,999.99	999999999
Monthly	\$ 999,999,999,999.99	999999999

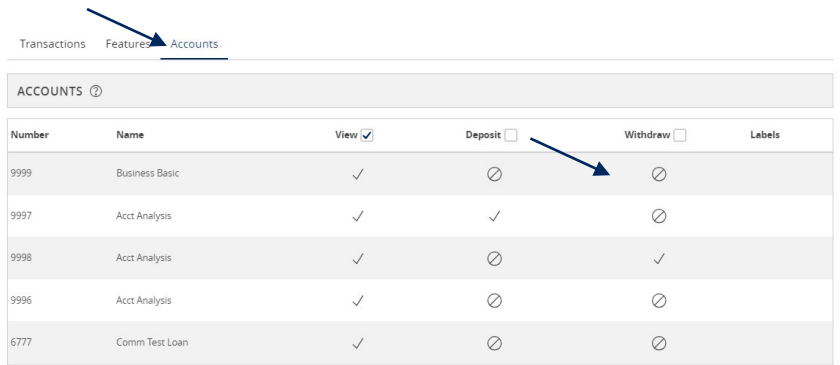
Features

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



Accounts

16. 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'.



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