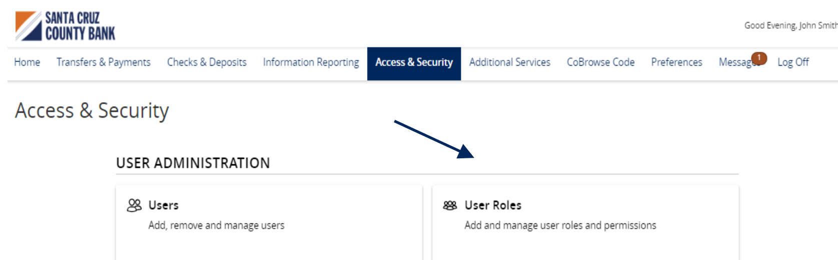
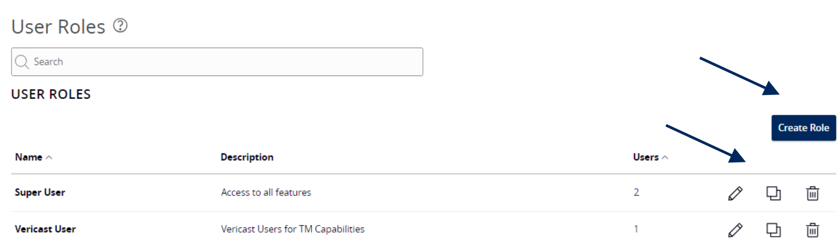
User Roles Guide

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.

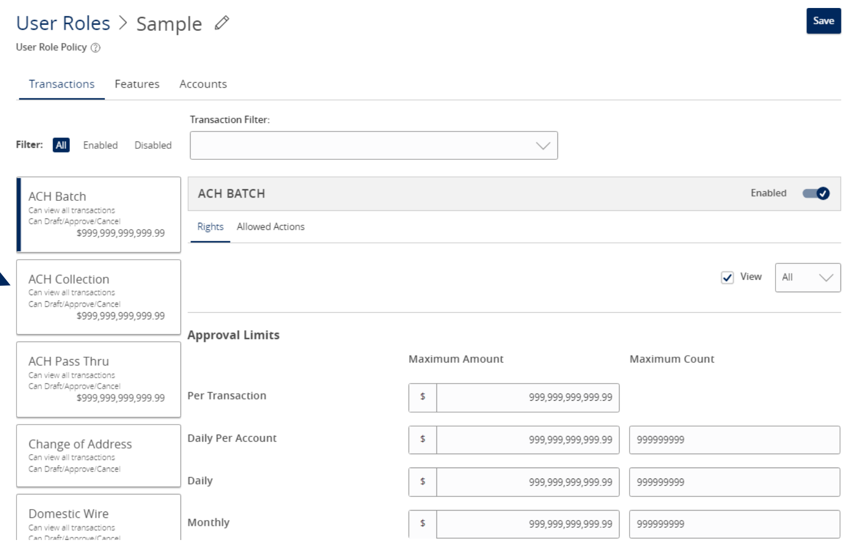
a. Select the pencil icon to edit the user role.

b. Select the double paper icon to copy the user role.

c. Select the trash bin to delete the user role.

3. Select a transaction type that you would like to set parameters around by clicking on the transaction name.

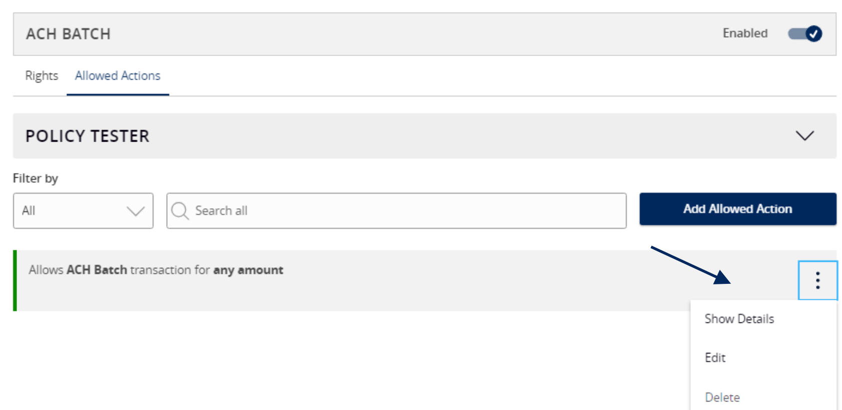
4. Now select 'Allowed Actions'.



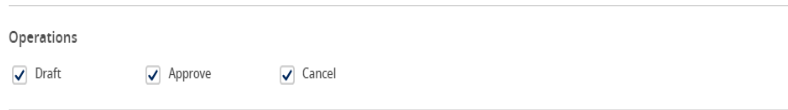
Allowed Actions

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'.



Operations



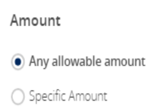
6. **'Draft'** allows a user to initiate a transaction.

   '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.

Amount



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

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.

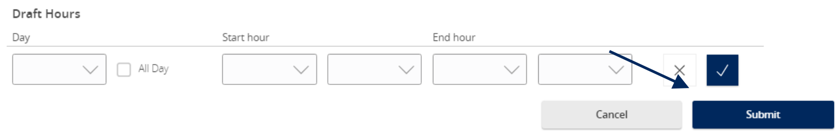
Accounts

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

Draft Hours

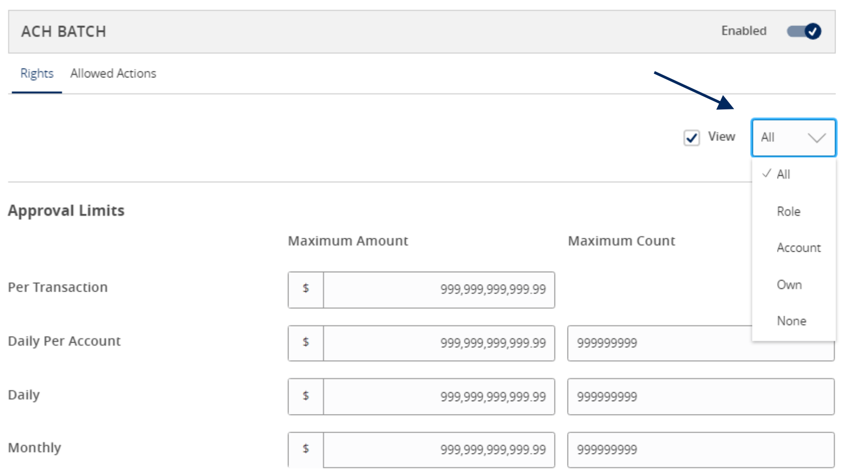
10. The ‘Draft Hours’ option allows you to restrict hours and days of the week when transactions can be drafted.

11. Select ‘Submit’.



Rights

12. 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

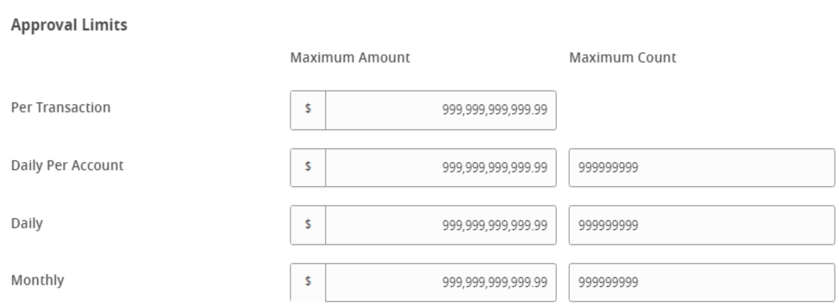
Own: View only your own transactions

None: Cannot view transactions

Approval Limits

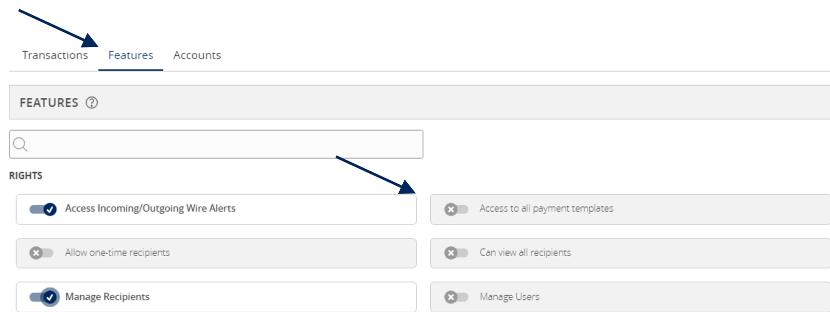
13. Select the ‘Approval Limits’ tab to view and modify the dollar and count limits assigned by Boston Private.

14. Repeat the previous steps for each transaction type.



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.