

# Multi-User Admin Guide

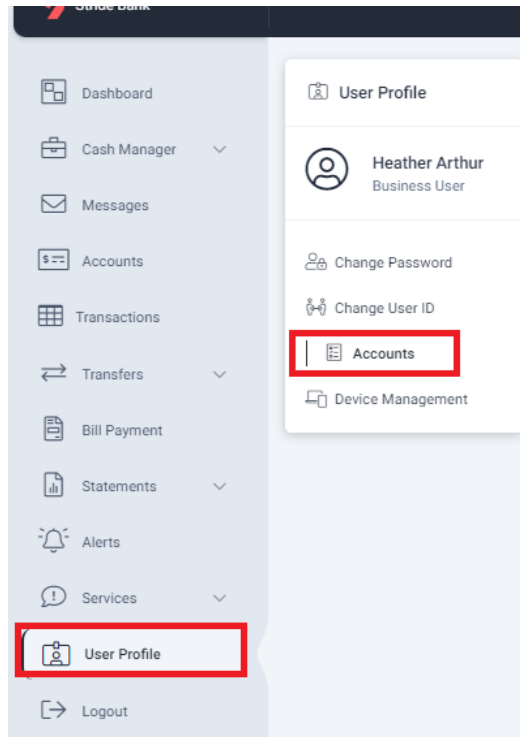
## Duties as Administrator:

- ✓ You will add/edit/remove users
  - You will set user permissions
  - You will set user limits, up to the company limits (limits for services such as Wires or ACH)
- ✓ You can change the account pseudo names to appear in online banking
- ✓ You can enroll the accounts in eStatements to receive your monthly statements quicker
  - You will be able to download to save or print off
  - You will retain a history of monthly statements going back 18 months
  - You do not need to enroll all accounts, you can pick and choose which accounts

*(Note: Transaction history downloaded from the account is only available 180 days from the current date.)*

## Updating Account Pseudo Names:

- ✓ Click on User Profile then Accounts



- ✓ Edit Account Name to update how it will appear in online banking then click Submit

**Manage Accounts**

Customize your account list by using this menu to sort, rename or hide/show accounts to your preference.

Select Account Type

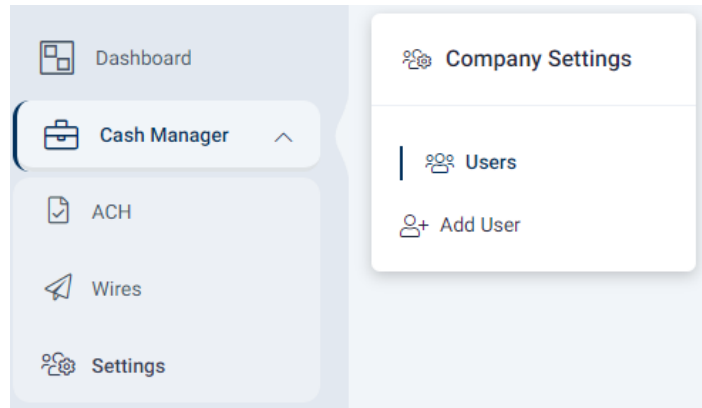
All

Order	Account Name	Last 4	Account Type	Status	Hide
≡	Frank N Stein	1867	Checking	Active	<input type="checkbox"/>
≡	Franks Towing	0684	Checking	Active	<input type="checkbox"/>

**Submit** **Cancel**

## Creating a User:

- ✓ Click on Cash Manager then Settings
- ✓ Choose Add User



- ✓ Enter the required information
  - Administration Role
    - Organization Company User: No for regular user
    - Organization Company Admin: Yes allows them to create other users, change account pseudo names and enroll in eStatements

### Role

A dropdown menu for selecting a user role. The selected option is 'Organization Company User'. Other visible options are 'Organization Company Admin' and another 'Organization Company User' option at the bottom.

- Profile Information
  - First and Last Name, Temporary Password, User Name
  - Description – Identifying information for the user

#### Profile Information

Basic Information about the user that helps you to identify the user once activated. The last 4 of the SSN is used when it is necessary to reset that user's password. It should be unique to that user if all possible.

First Name	Last Name	Temporary Password
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="text"/>
User Name	Description	
<input type="text" value="Username"/>	<input type="text" value="Description"/>	

- Profile Contact Info:
  - Email Address
  - Phone Numbers (Phone Type: Both, Phone Call, Text)

**Profile Contact Information**

This information will be utilized during the login process for security purposes. A two factor code will be presented via the contact methods available. It is required that at least 1 of these fields be completed.

Email Address

Phone #1

Phone Type #1

Phone #2

Phone Type #2

### Assign Menus to the User:

- ☒ Messages
- ☒ Transactions
- ☒ Transfers
  - ☒ Make Transfer
  - ☒ Scheduled Transfer
- ☒ Statements
- ☒ Services
  - ☒ Stop Payments
    - ☒ New Stop Payment
    - ☒ Current Stop Payments
- ☒ User Profile
  - ☒ Change Password
  - ☒ Change Username
  - ☒ Accounts
  - ☒ Device Management



Add Restrictions to the User (as needed):

- 24/7 Access

1

Profile

2

Menus

3

Restrictions

Configure Day(s)

Time of Day

Time Zone

All

24 Hrs

Central

- Restricted Access (per day basis)

☒ Monday

☐ All Day Access

Hour

Minute

Hour

Minute

Time Zone

8 AM

00

5 PM

15

Central

☐ Tuesday

☐ Wednesday

☐ Thursday

☒ Friday

☐ All Day Access

Hour

Minute

Hour

Minute

Time Zone

8 AM

00

6 PM

15

Central

☐ Saturday

☐ Sunday

Out of Band Authentication is for Cash Management users and will not pertain to your user. You can click submit to complete this step.

Out of Band Authorization

ACH Initiate

UniFI

Text

Voice

Wire Authorization

UniFI

Text

Voice

Cancel

Previous

Submit



## Assign Accounts:

**User Settings**  
test

**User Accounts**

**Cash Management Account Settings** Account Setup Complete ☐

Please review and/or edit this user's Account Access.

Name	Type	Account Options
Business - Share Account	Checking	<a href="#">Edit</a>
Commercial Analysis Checking	Checking	

- Click the three dots to the right of the account in order to activate/deactivate permissions within the account.

### Edit Account Settings

#### ACCOUNT FEATURES

Select All/None

<input type="checkbox"/> Account	<input type="checkbox"/> Transaction	<input type="checkbox"/> Stop Payment
<input type="checkbox"/> Documents	<input type="checkbox"/> Alerts	<input type="checkbox"/> Text Banking
<input type="checkbox"/> Transfer From	<input type="checkbox"/> Transfer To	<input type="checkbox"/> Bill Pay

- When all accounts that you wish to enable have been updated, click the Account Setup Complete option as validation that this step has been completed for this user.

#### User Accounts

##### Cash Management Account Settings

Please review and/or edit this user's Account Access.



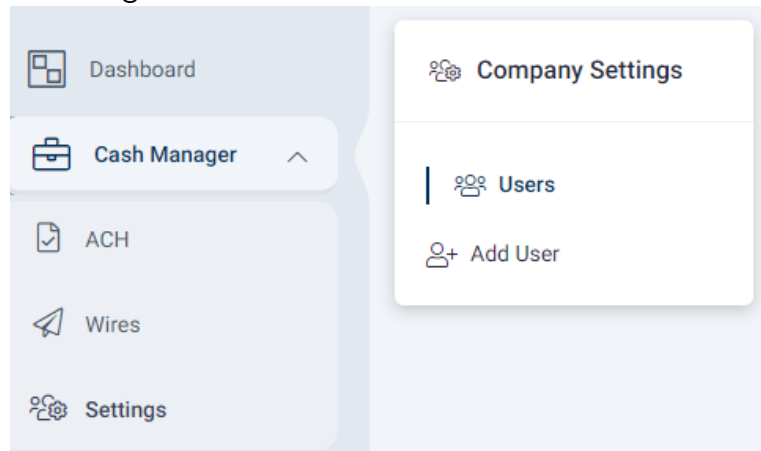
Account Setup Complete



Companies – No updates are needed in this regard.

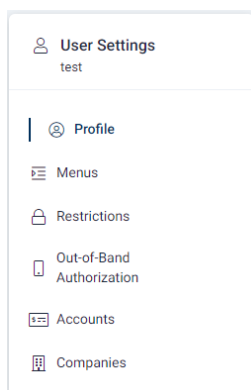
## Edit User Permissions:

- ✓ Go to Cash Manager, Users, CM User List



- ✓ Choose your User
- ✓ Click on Select Option (three dots) and then click Edit

Stride Test	rrheatest	Organization Company User	<input type="checkbox"/>	User Options	⋮
test	testtest1234	Organization Company User	<input type="checkbox"/>	Edit	⋮
				Delete	
				Reset Password	



- ✓ Under Profile
  - Can update Role, Name, Username, Contact Info, etc.
  - If a user is locked out, you can unlock them from the previous screen.

## ⓧ User Profile

### User Profile Settings

Please review and/or edit this user's Profile.

#### Role

Organization Company User

#### Profile Information

Basic information about the user that helps you to identify the user once activated. The last 4 of the SSN is used when it is necessary to reset that user's password. It should be unique to that user if all possible.

##### First Name

Test

##### Last Name

Test

##### User Name

testtest1234

##### Description

test

#### Profile Contact Information

This information will be utilized during the login process for security purposes. A two factor code will be presented via the contact methods available. It is required that at least 1 of these fields be completed.

##### Email Address

gmail@gmail.com

##### Phone #1

8667495900

##### Phone Type #1

Both

##### Phone #2

##### Phone Type #2

Text

< Back

Cancel

Submit

## ✓ Under Menus

- Add/Remove menu access
- Add/Remove standard permissions
  - Click submit after making any changes
  - ☒ Messages
  - ☒ Transactions
  - ☒ Transfers
    - ☒ Make Transfer
    - ☒ Scheduled Transfer
  - ☒ Statements
  - ☒ Services
    - ☒ Stop Payments
      - ☒ New Stop Payment
      - ☒ Current Stop Payments
  - ☒ User Profile
    - ☒ Change Password
    - ☒ Change Username
    - ☒ Accounts
    - ☒ Device Management





- ✓ Under Restrictions
  - Update when the user can access the system if not 24/7

1 Profile 2 Menus 3 Restrictions

Configure Day(s) Time of Day Time Zone

All 24 Hrs Central

Out of Band Authorization

ACH Initiate

UniFi Text Voice

Wire Authorization

UniFi Text Voice

Cancel Previous Submit

- ✓ Assign Accounts

User Settings test

User Accounts

Cash Management Account Settings Account Setup Complete

Please review and/or edit this user's Account Access.

Name	Type
Business - Share Account	Checking
Commercial Analysis Checking	Checking

Account Options

Edit

- Click the three dots to the right of the account in order to activate/deactivate permissions within the account.

- ✓ Under Account Settings
  - Update any specific account permissions for each account
    - Click submit after making changes

 [Edit Account Settings](#)

#### ACCOUNT FEATURES

Select All/None



Account



Transaction



Stop Payment



Documents



Alerts



Text Banking



Transfer From



Transfer To



Bill Pay

- When all accounts that you wish to enable have been updated, click the Account Setup Complete option as validation that this step has been completed for this user.

#### User Accounts

##### Cash Management Account Settings

Please review and/or edit this user's Account Access.



Account Setup Complete

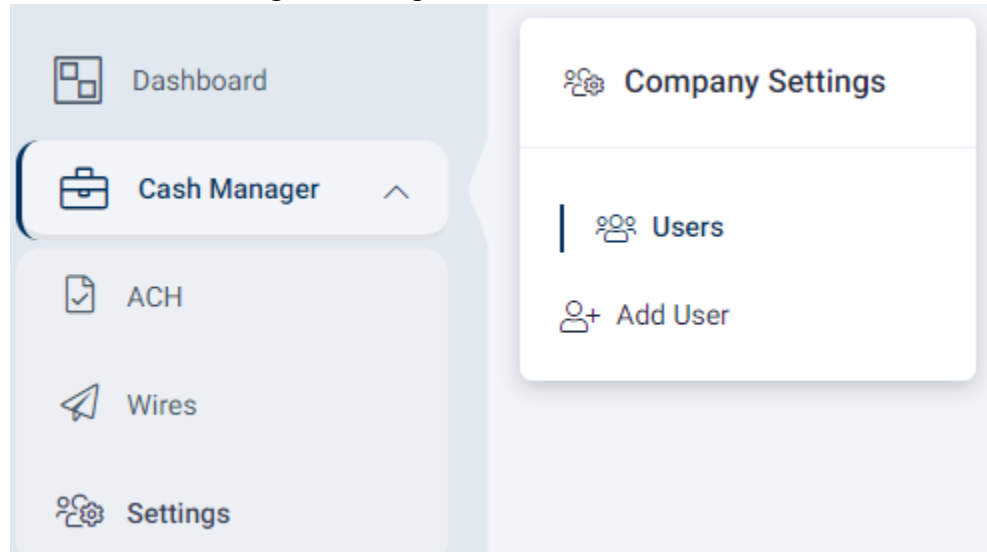


Companies – No updates are needed in this regard.









## Disable a User:

- ✓ Go to Cash Manager, Settings, Users

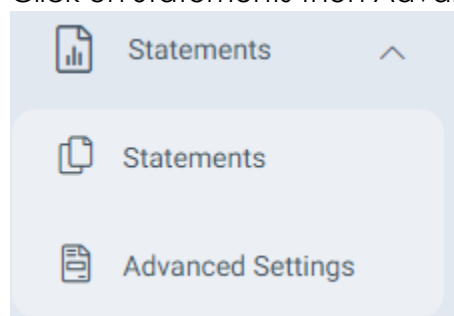


- ✓ Find the user and click the “Is Disabled” button as shown above

Name	User ID	Role	Is Disabled	Is Locked	
Stride Test	rrheatest	Organization Company User			
test	testtest1234	Organization Company User			

## Enrollment in eStatements:

- ✓ Click on Statements then Advanced Settings



- ✓ Click on Details to enroll your eligible accounts

You may choose to receive your statements and notices for your account(s) delivered via email and made available online through this site. To enroll your account(s) please follow the steps outlined below:

1. Account(s) and Document Enrollment  
All available documents for all active accounts: [Details](#) **Click Details to Enroll**
2. Please review the following email address. If not correct, please update it in the space shown.
3. Please read the disclosure below. You must scroll to the bottom of the disclosure before agreeing to the terms listed.

**CONSENT TO ACCEPT ELECTRONIC DELIVERY OF E-STATEMENTS AND E-DISCLOSURES**  
Stride Bank, N.A. Customer Care Center 580-233-3535  
P.O. Box 3448 · Enid OK 73702-3448  
Effective February 19, 2019

**Definitions**  
In this Agreement, the word "e-Statement" refers to your periodic Statement of Account. The word "e-Disclosure" refers to any other disclosures that we would normally provide to you in a written form that you retain. The words "you" and "your" refer to you, the customer of Stride Bank, N.A. The words "Bank", "we," "us," and "our" mean Stride Bank, N.A. The name "Internet Banking" refers to the Internet Banking product of the Bank.

**Consent to Receive Periodic Statements and Disclosures Electronically:**  
By clicking the "I Agree" button below, you agree to accept your e-Statements and e-Disclosures electronically. Your e-Statement includes transaction activity for all of your accounts with the Bank, which includes savings, checking, time deposits, loans, and others. (It does not include trust, insurance or investment accounts that you may have with the Bank.) It is your duty to review your statement every month, as you must report errors to us within 60 days of the error appearing on your periodic statement. You further agree that we will discontinue mailing a paper statement to you and may communicate with you electronically, as necessary. You also agree to receive other disclosures online when we elect to make them available in electronic format. These include, but are not limited to, the Bank's Privacy Notice, your periodic notice of billing error rights, your periodic notice of how to report errors that involve your electronic funds

- You can check mark the box next to each account you wish to enroll
  - By clicking the plus sign next to the account shows the documents you can receive in eStatements
  - If an account is ineligible, it will be grayed out so it is not an option to choose (such as loans)

You may choose to receive your statements and notices for your account(s) delivered via email and made available online through this site. To enroll your account(s) please follow the steps outlined below:

1. Account(s) and Document Enrollment  
All available documents for all active accounts: [Details](#)
2. ☒ Enroll All Available Accounts and Document Types Shown  
**Enroll Accounts**  
+ ☒ CommunCk 0001
3. **Save Settings**

- Click Save Settings when completed

- ✓ Click Statements and Notices to view monthly account statements
  - Choose the account to view

**STATEMENTS**



**STATEMENTS/NOTICES** SIGN UP/CHANGES EMAIL SETTINGS ADDITIONAL RECIPIENTS DISCLOSURES



**Account(s)** Addie **Document Type** All **Date Range** Most Recent **FILTER**

- Choose to Download or View

View Statement/Notices For: Test Chking 0001

Date	Description		
03/04/2022	Enhanced Statements March 2022	 <a href="#">View</a>	 <a href="#">Download</a>
02/04/2022	Enhanced Statements February 2022	<a href="#">View</a>	<a href="#">Download</a>
01/04/2022	Enhanced Statements January 2022	<a href="#">View</a>	<a href="#">Download</a>

- ✓ If you have any questions, you can reach out to us at [treasurymgmtsupport@stridebank.com](mailto:treasurymgmtsupport@stridebank.com) or 866.749.5900