



Parkside Financial

BANK & TRUST

Business Digital Banking User Guide

Learn how to use Digital Banking with this handy guide. For questions contact us at:

St. Louis Office 314.290.8600 / **Denver Office** 720.844.3400



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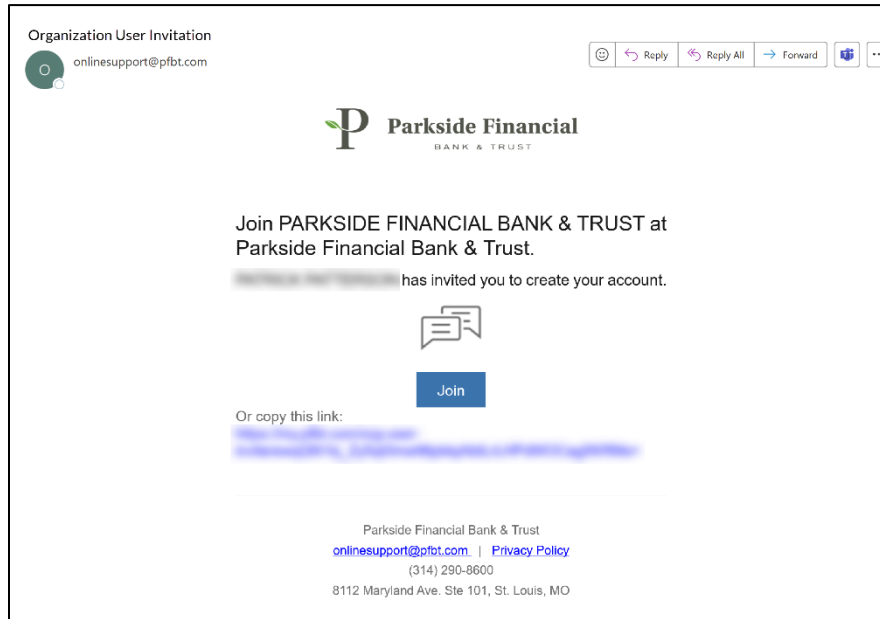
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First Time Login

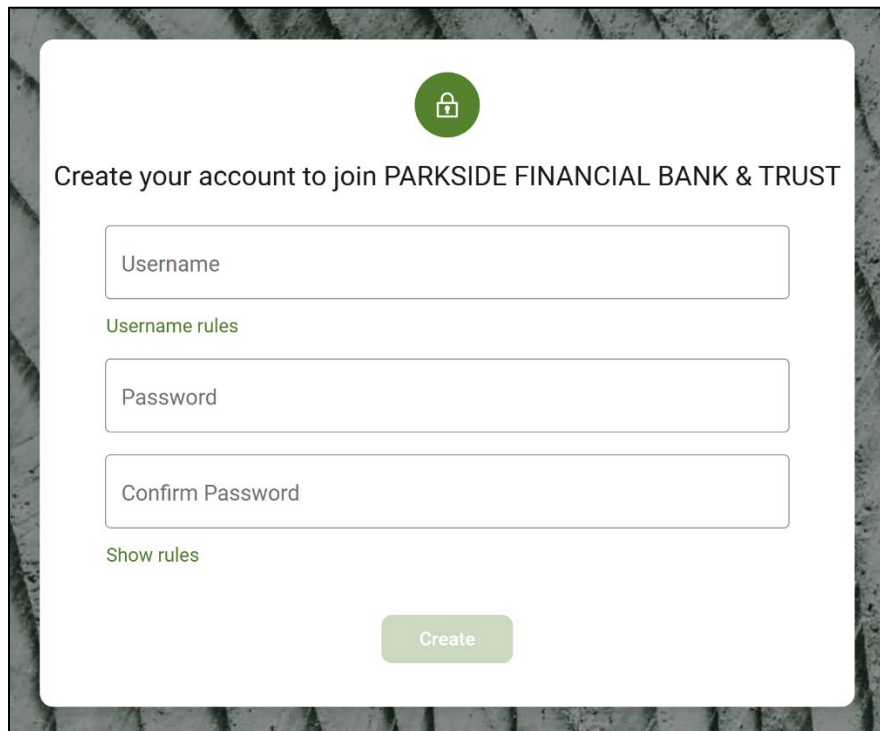
Step 1

Open your enrollment email and click **Join**.



Step 2

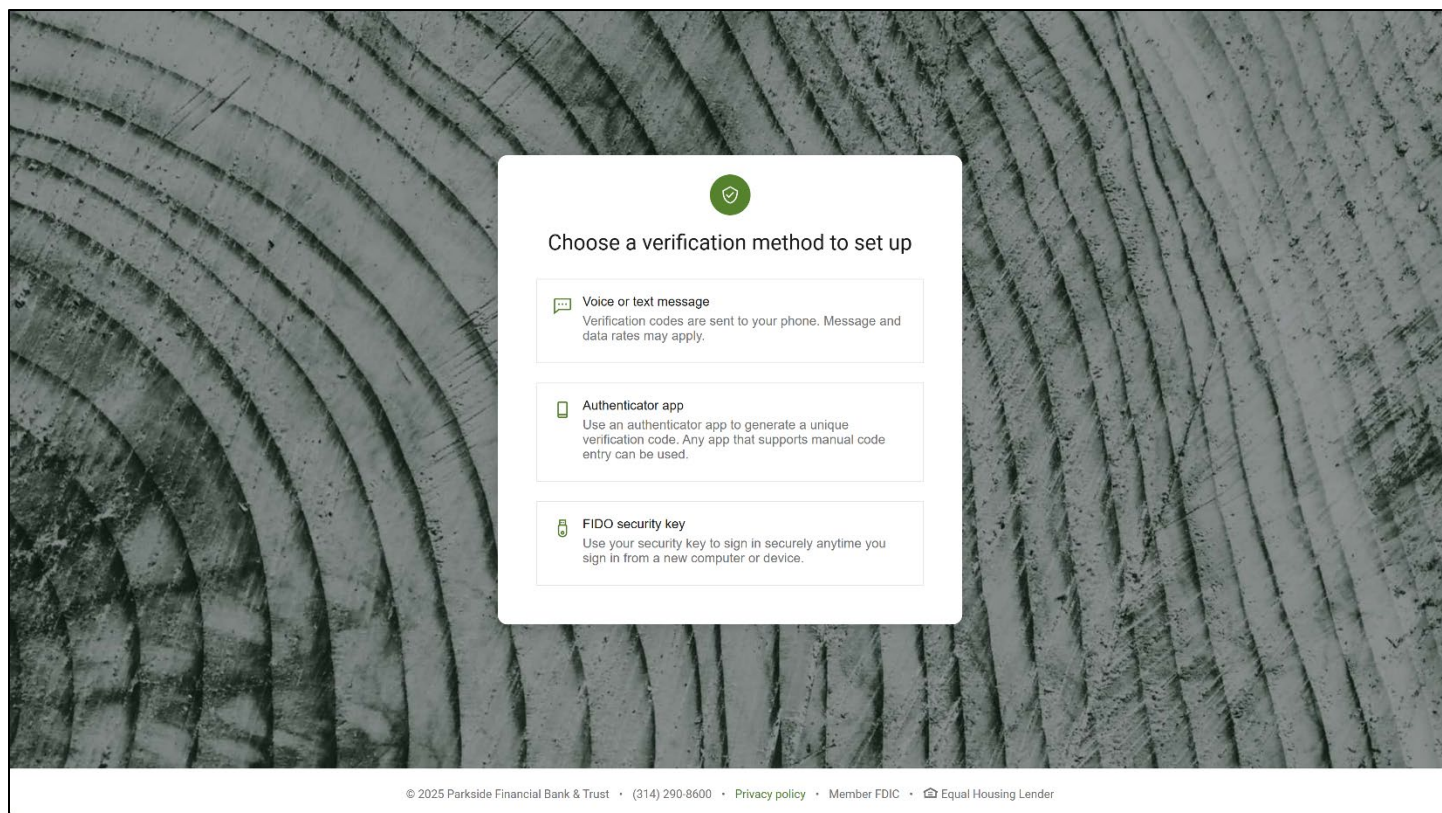
Create your **username** and **password**. Click **Create** and sign In.

A screenshot of a web form for creating an account. The form is titled "Create your account to join PARKSIDE FINANCIAL BANK & TRUST" and features a green lock icon. It contains three input fields: "Username", "Password", and "Confirm Password". Below the "Username" field is a link for "Username rules". Below the "Confirm Password" field is a link for "Show rules". A green "Create" button is located at the bottom of the form.

Step 3

Review the information regarding registering for two-factor authentication and click Get started. Choose how to receive your two factor authentication codes:

- **Voice or text message:** Enter your phone number and choose to receive your code via text or phone call. Enter the code you receive.
- **Authenticator app:** Open your authenticator app and either scan the QR code or enter the code that appears manually. Enter the code that generates on your app.
- **FIDO security key:** Insert or tap your security fob to your device or scan the QR Code.

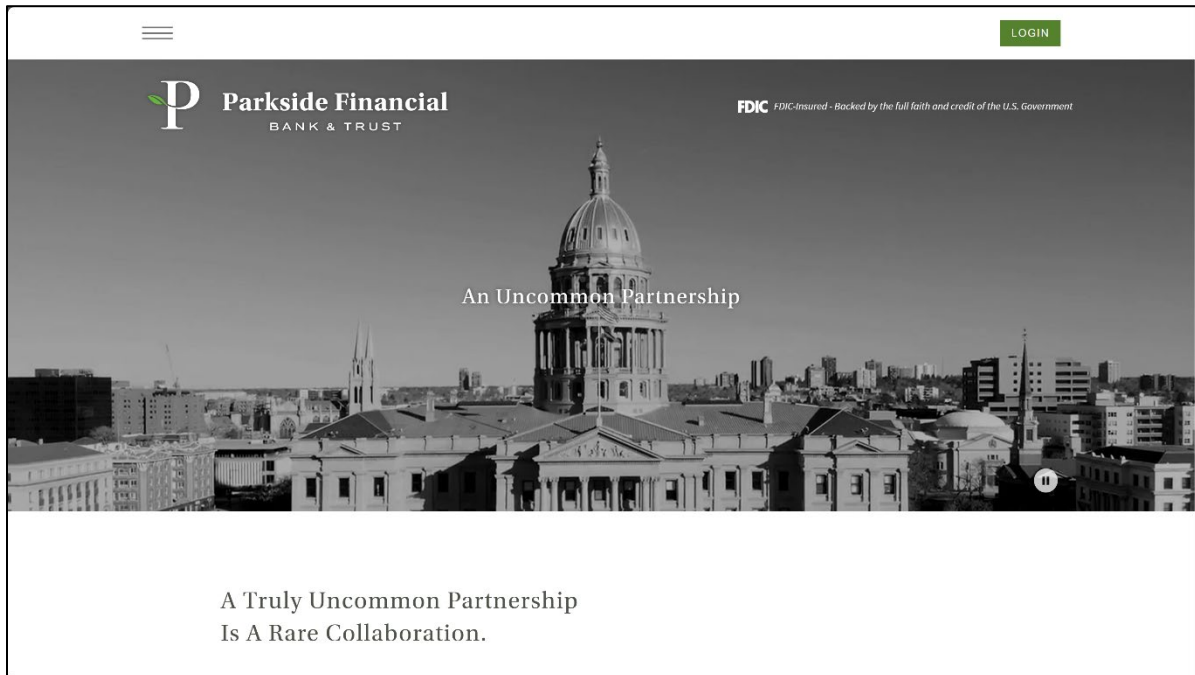


Step 4

Click **Done** and accept the **Terms and Conditions**.

Account Recovery

Use these steps to reset your password and/or retrieve your username.



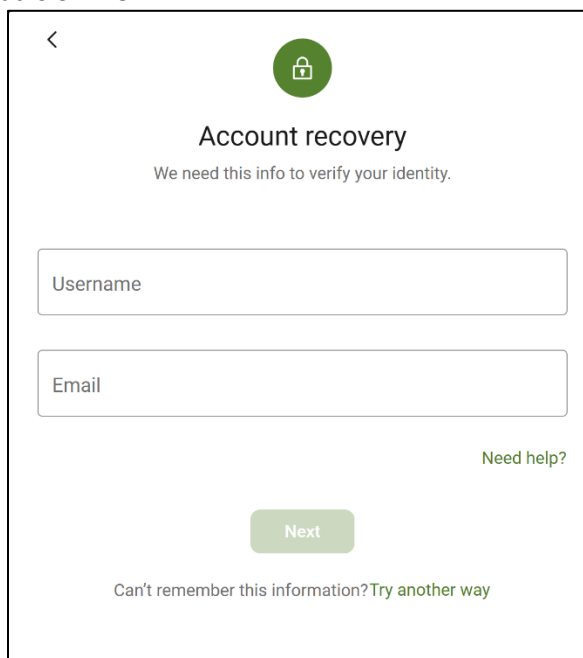
Step 1

Navigate to our website and click **Login**. Select **Forgot**.

Step 2

Enter your username and email address.

IMPORTANT: Email must match what is on file.



<



Account recovery

We need this info to verify your identity.

Username

Email

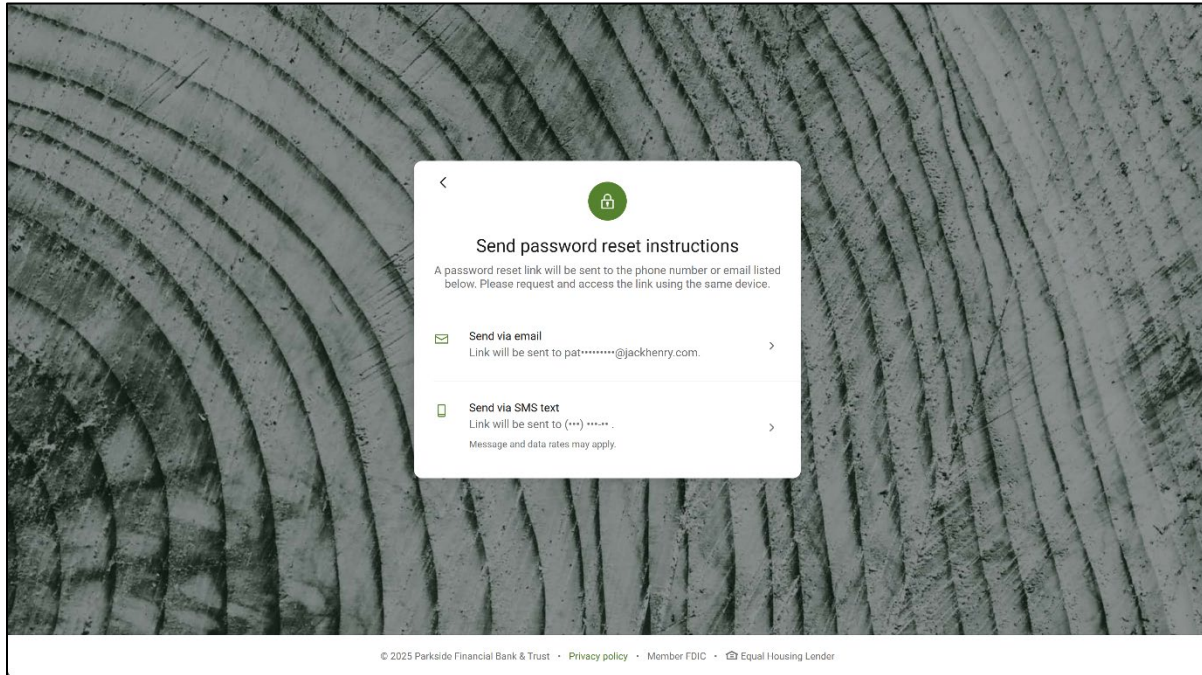
[Need help?](#)

[Next](#)

[Can't remember this information? Try another way](#)

Step 3

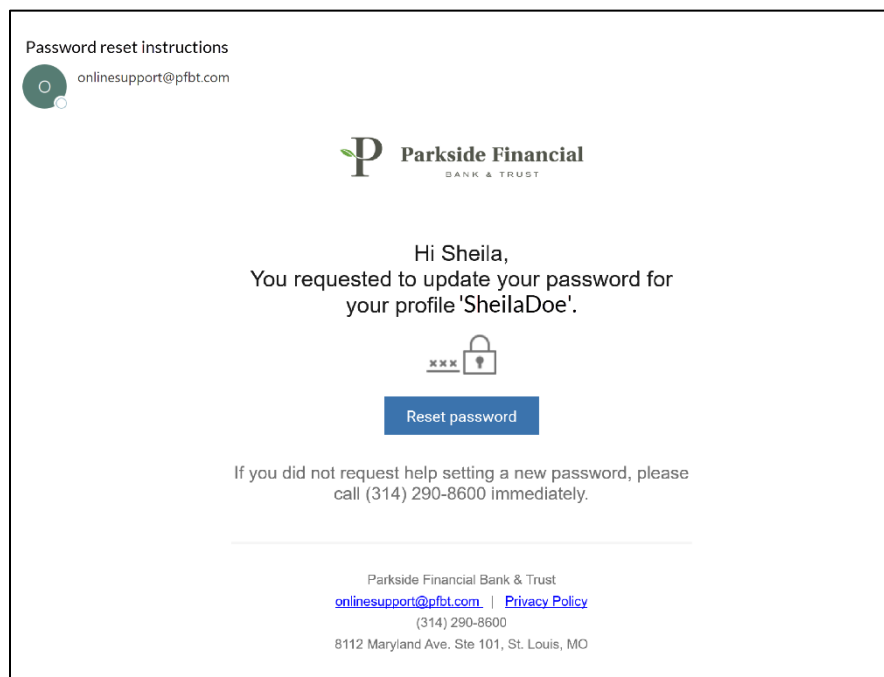
Choose to receive your instructions via email or text.



Step 4

Email: Open your email. Your username will appear in the email body. Click **Reset Password** if applicable.

Text: Open your text and click the link.



Step 5

Enter the code you receive and create a new password.



Reset password

Login for SheilaDoe

[Show rules](#)

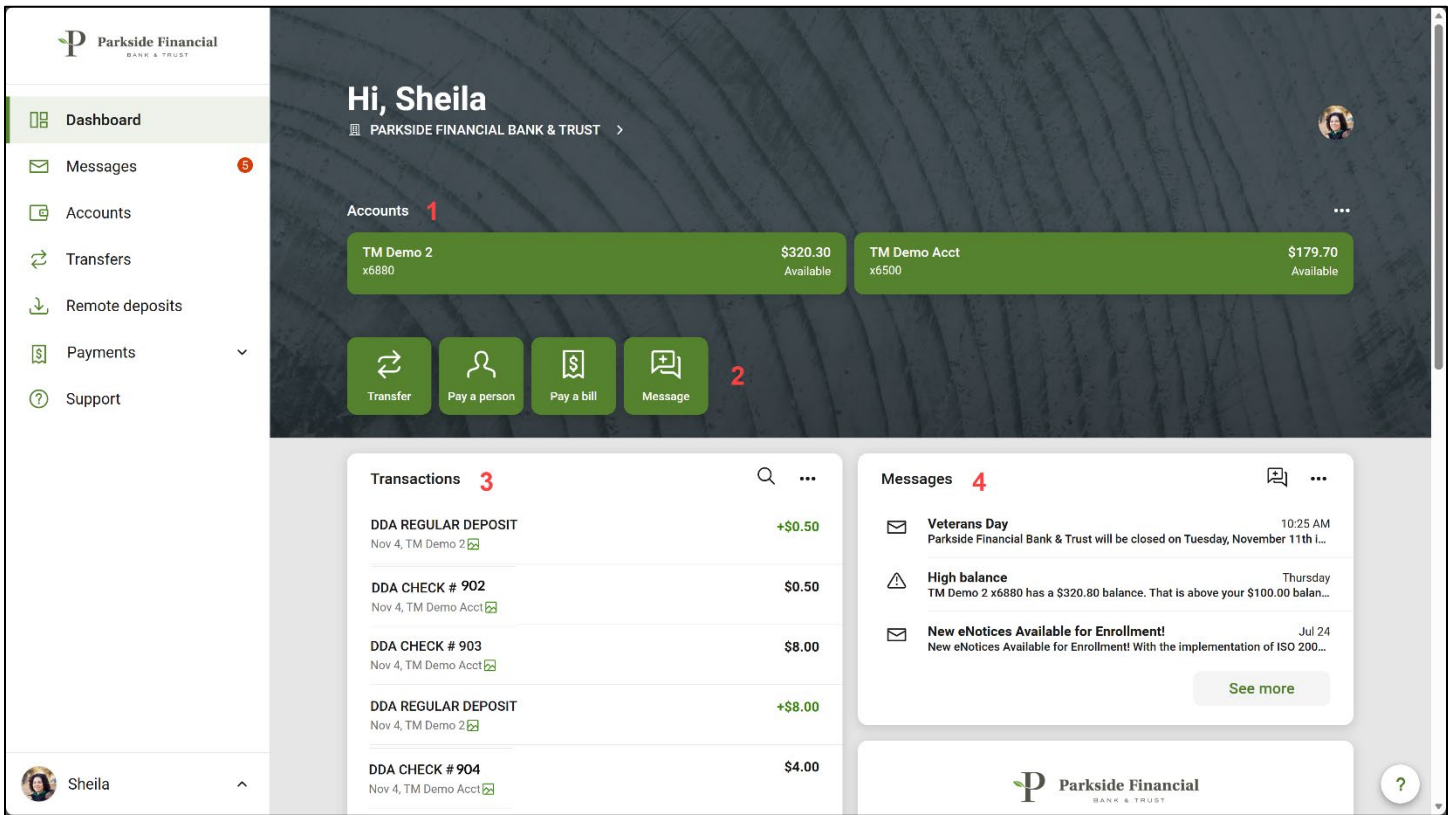
Update

Dashboard

This is your landing page where you can access your accounts, review recent activity, and move money.

Default Layout

1. **Accounts** - Displays accounts including balance, status, and last four digits of account number.
2. **Quick Action Buttons** - Click a button to jump to that feature of online banking
3. **Transactions** - Displays recent activity on all accounts
4. **Messages** - Displays conversations between you and support representatives as well as alerts and bank messages.
5. **Transfers** - Displays scheduled transfers and a quick link to Make a Transfer.
6. **Remote Deposits** - Make remote check deposits with your mobile device and track them online.



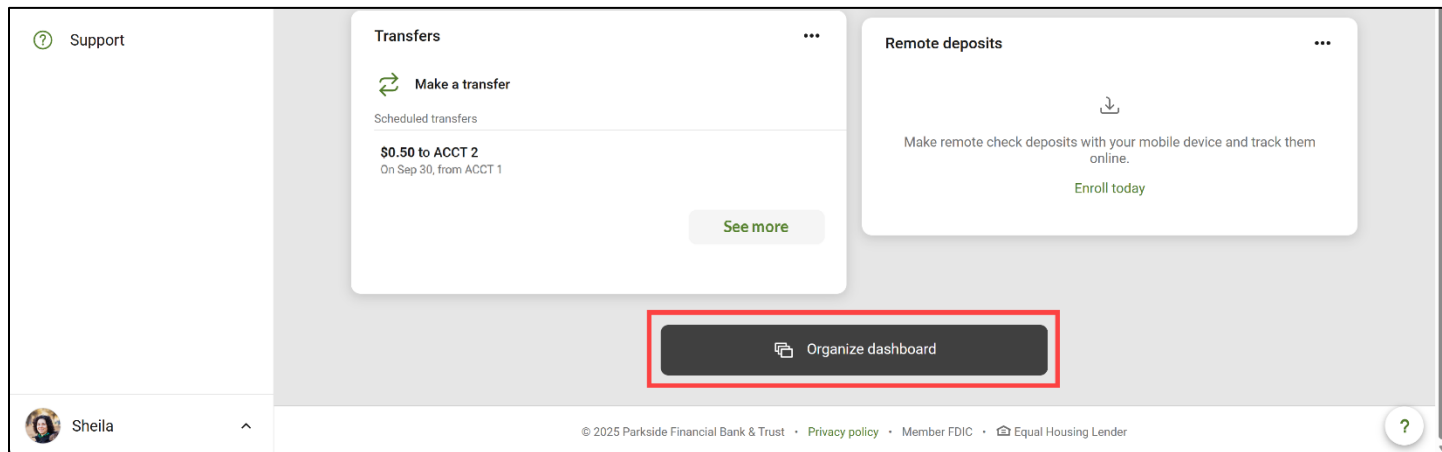
The screenshot shows the digital banking dashboard for a user named Sheila. The interface includes a left-hand navigation menu with options: Dashboard, Messages (5), Accounts, Transfers, Remote deposits, Payments, and Support. The main content area displays a greeting 'Hi, Sheila' and the bank's name 'PARKSIDE FINANCIAL BANK & TRUST'. Below this, there are two account cards: 'TM Demo 2 x6880' with a balance of \$320.30 and 'TM Demo Acct x6500' with a balance of \$179.70. A row of quick action buttons is visible: Transfer, Pay a person, Pay a bill, and Message (2). The dashboard is divided into two main sections: Transactions (3) and Messages (4). The Transactions section lists several items: DDA REGULAR DEPOSIT (+\$0.50), DDA CHECK # 902 (\$0.50), DDA CHECK # 903 (\$8.00), DDA REGULAR DEPOSIT (+\$8.00), and DDA CHECK # 904 (\$4.00). The Messages section contains three alerts: Veterans Day closure, High balance warning, and New eNotices availability. The bottom of the dashboard shows the user's profile 'Sheila' and the Parkside Financial logo.

Organize Dashboard

Use this feature to **add**, **remove**, or **reorder** the cards on the dashboard.

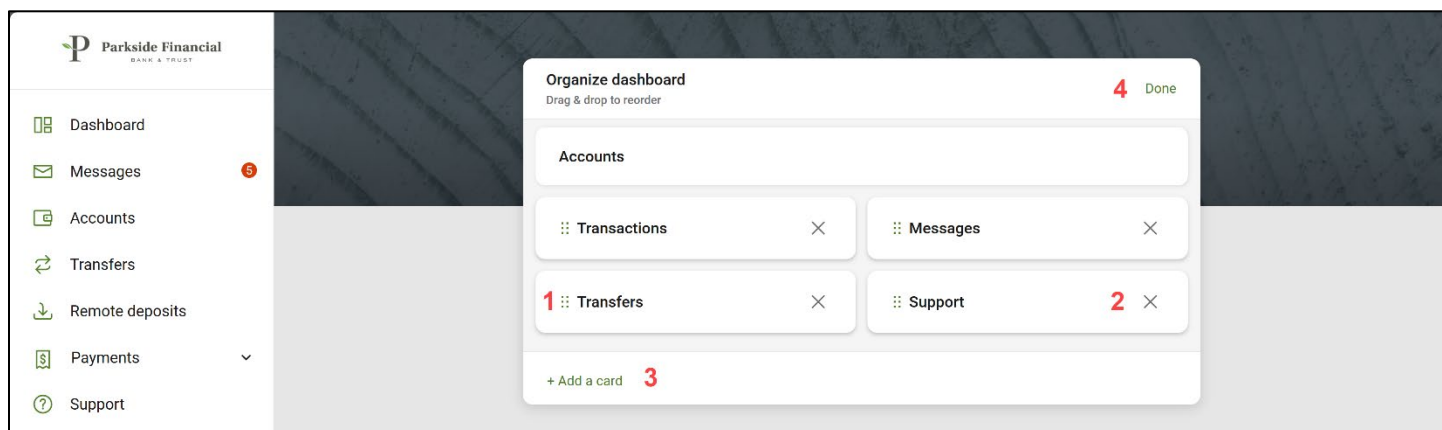
Step 1

Click **Organize Dashboard**.



Step 2

1. Click and hold the **6 dot icon** to drag and drop the cards to the order you prefer.
2. Click the **X** to remove a card from the dashboard.
3. Click **+ Add a card** to browse available cards that may be added to the Dashboard. Select any you'd like to appear and click **<** when finished.
4. Click **Done** once the layout suits your needs.

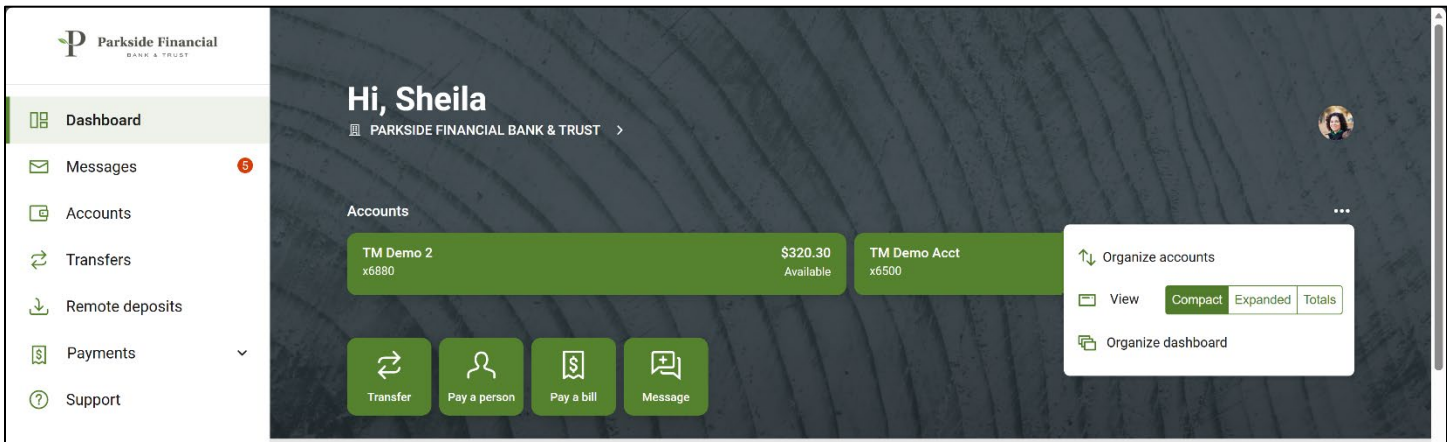


Organize Accounts

Use this feature to change the order of your accounts on the dashboard or update how the account information is displayed.

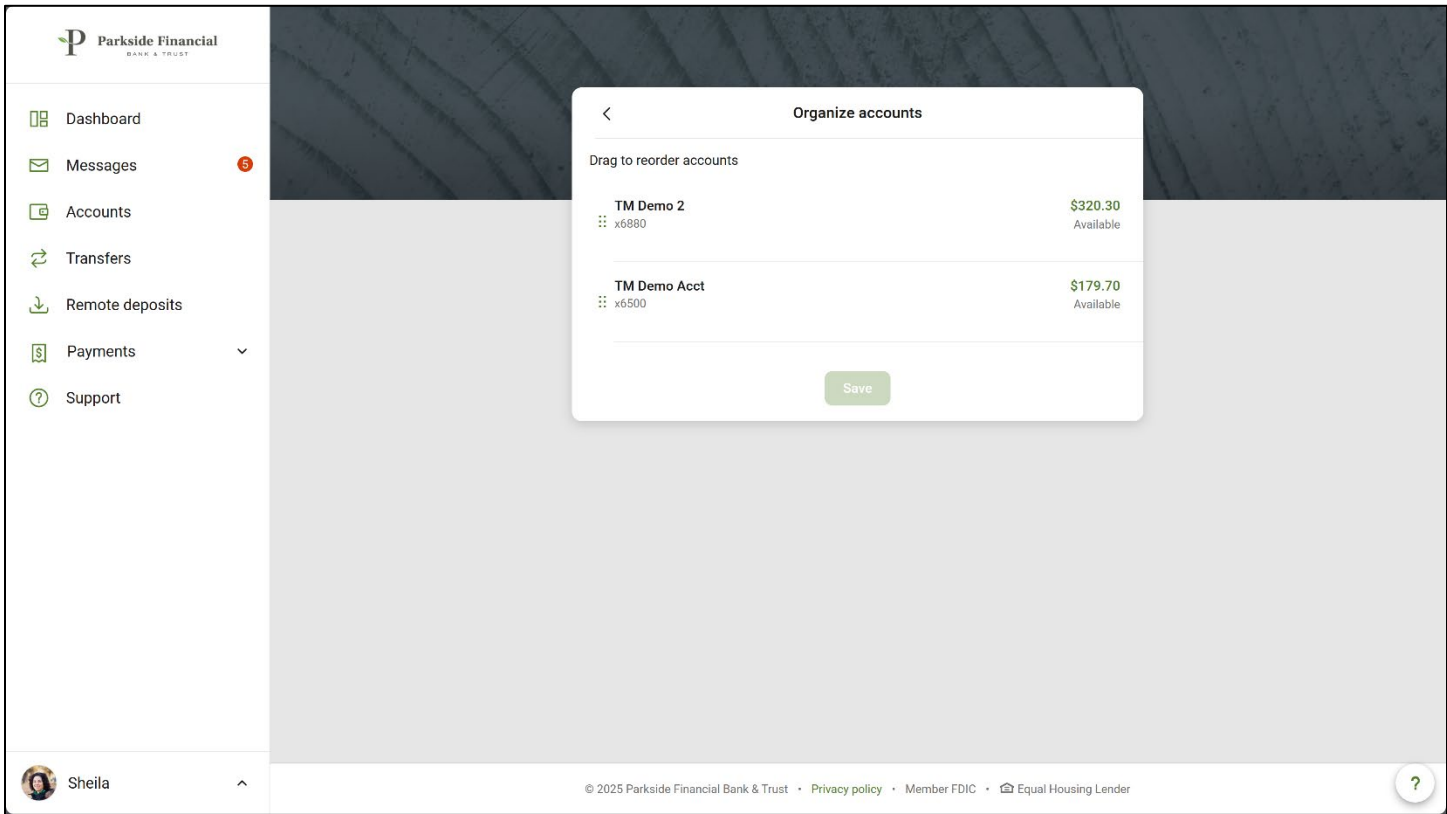
Step 1

Click the **ellipsis icon** next to the **Accounts** section, then select **Organize accounts**.



Step 2

Click and hold the **6 dot icon** to drag and drop an account to the order you prefer, then click **Save**.

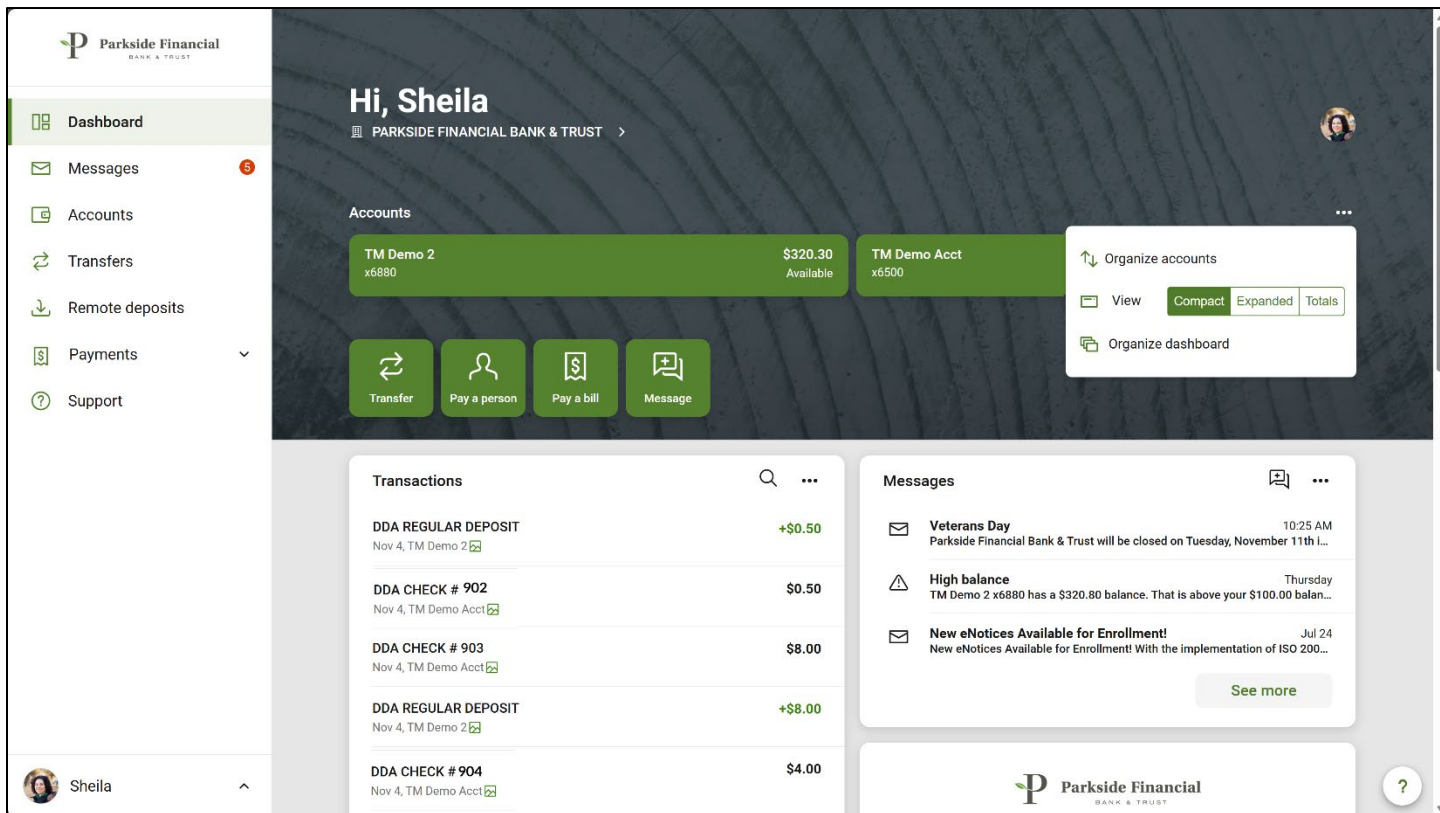


Account View

Use this feature to change what account information is displayed on the dashboard.

Click the ellipsis icon next to the **Accounts** section choose from one the **View** options:

- **Compact:** Displays accounts in a single row. Only three accounts will appear at a time.
- **Expanded:** Displays accounts in two rows. Up to six accounts will appear at a time.
- **Totals:** Groups accounts together based on type such as Cash, Borrowed, Credit Balance, and Investments. Displays the total balance for all accounts in each group.



The screenshot displays the Parkside Financial digital banking interface. On the left is a navigation menu with options: Dashboard, Messages (5), Accounts, Transfers, Remote deposits, Payments, and Support. The main content area is titled 'Hi, Sheila' and shows the 'Accounts' section with two accounts: 'TM Demo 2 x6880' with a balance of \$320.30 and 'TM Demo Acct x6500'. Below the accounts are buttons for Transfer, Pay a person, Pay a bill, and Message. A dropdown menu is open next to the 'Accounts' section, showing options to 'Organize accounts' (with 'View' set to 'Compact'), 'Organize dashboard', and 'Totals'. The 'Transactions' section lists five transactions: DDA REGULAR DEPOSIT (+\$0.50), DDA CHECK # 902 (\$0.50), DDA CHECK # 903 (\$8.00), DDA REGULAR DEPOSIT (+\$8.00), and DDA CHECK # 904 (\$4.00). The 'Messages' section contains three messages: 'Veterans Day' (10:25 AM), 'High balance' (Thursday), and 'New eNotices Available for Enrollment!' (Jul 24). The bottom of the dashboard shows the user's profile 'Sheila' and the Parkside Financial logo.

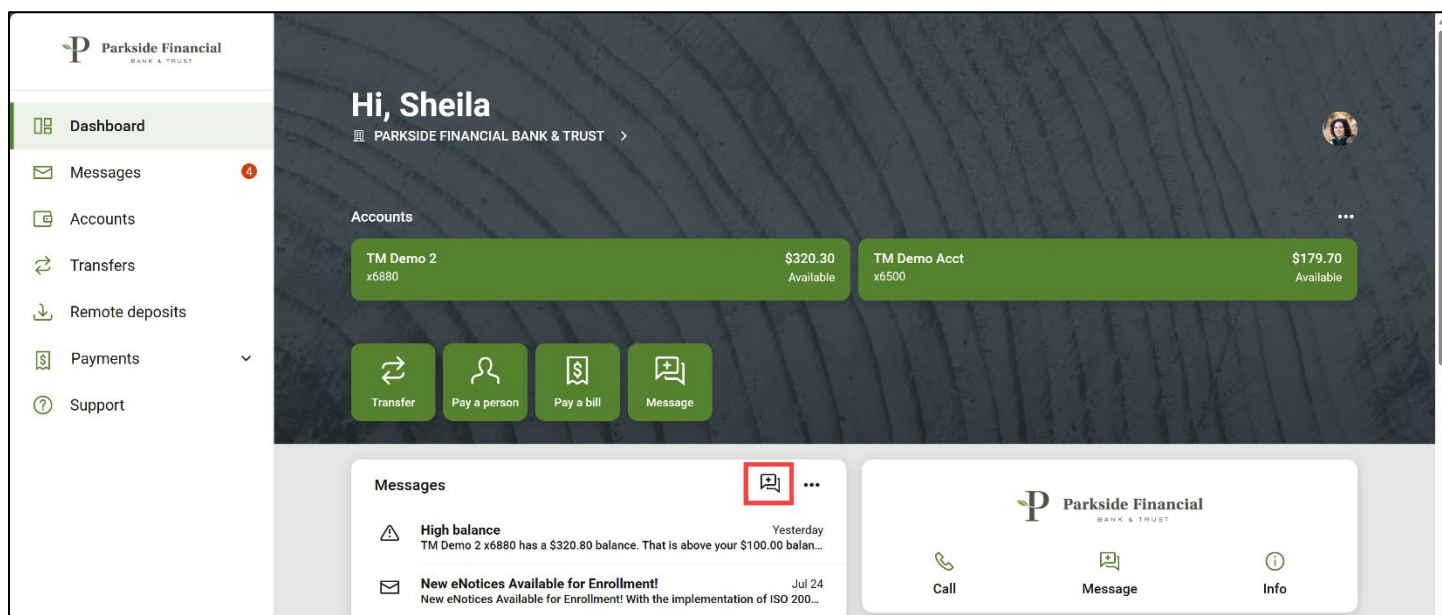
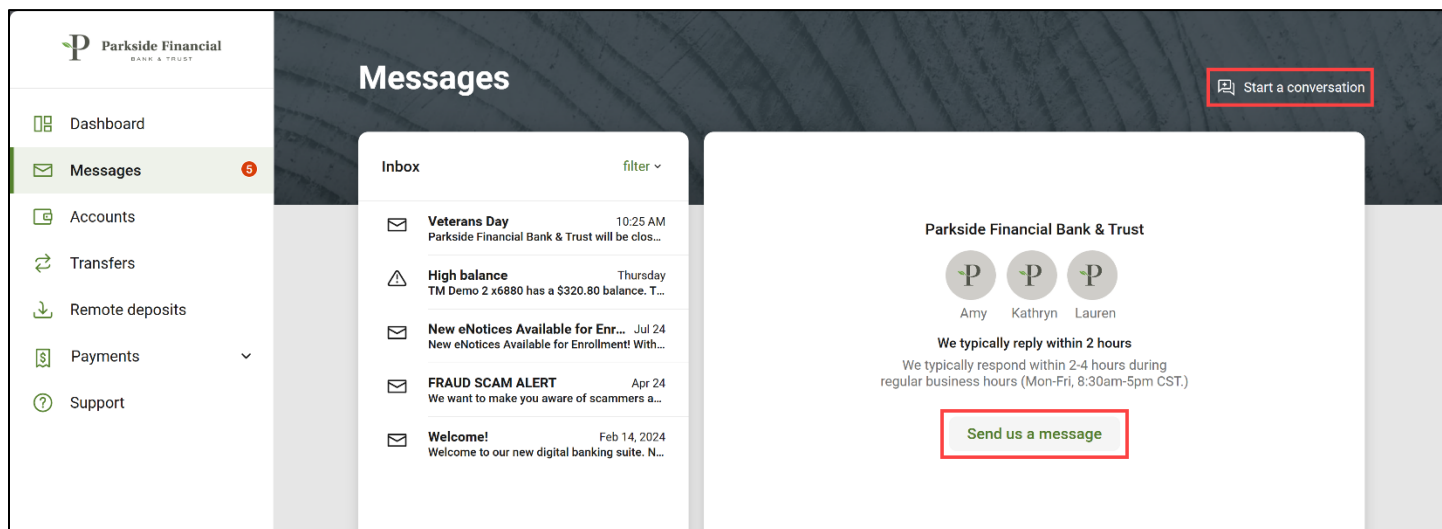
Messages

Use this module to start a conversation with the institution, review alerts, and access informational messages from the institution.

Start a Conversation

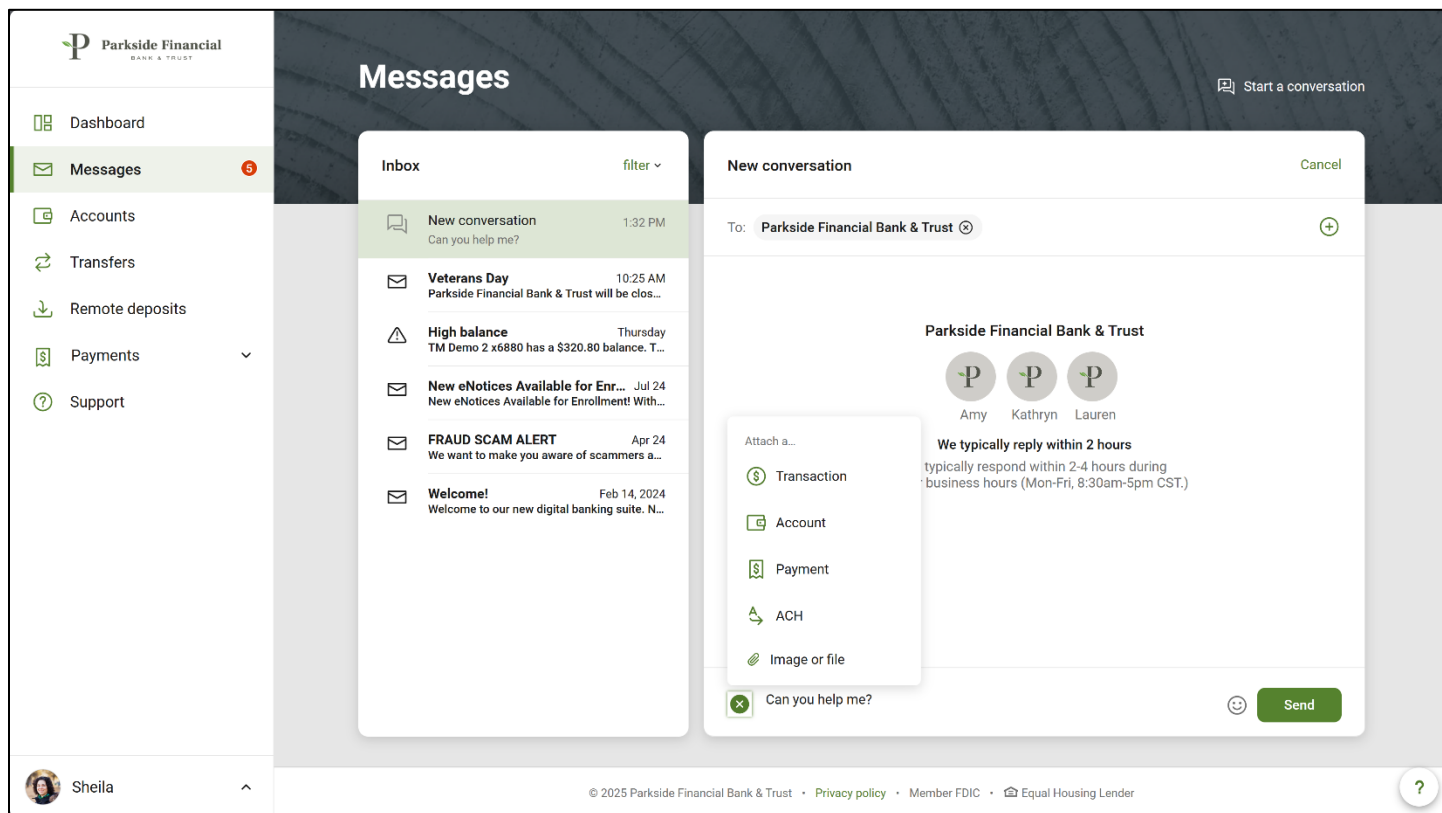
Step 1

Select **Messages** from the navigation pane or navigate to the **Messages** card on the **Dashboard**. Click **Start a conversation**, **Send us a message**, or select the **New conversation** icon.



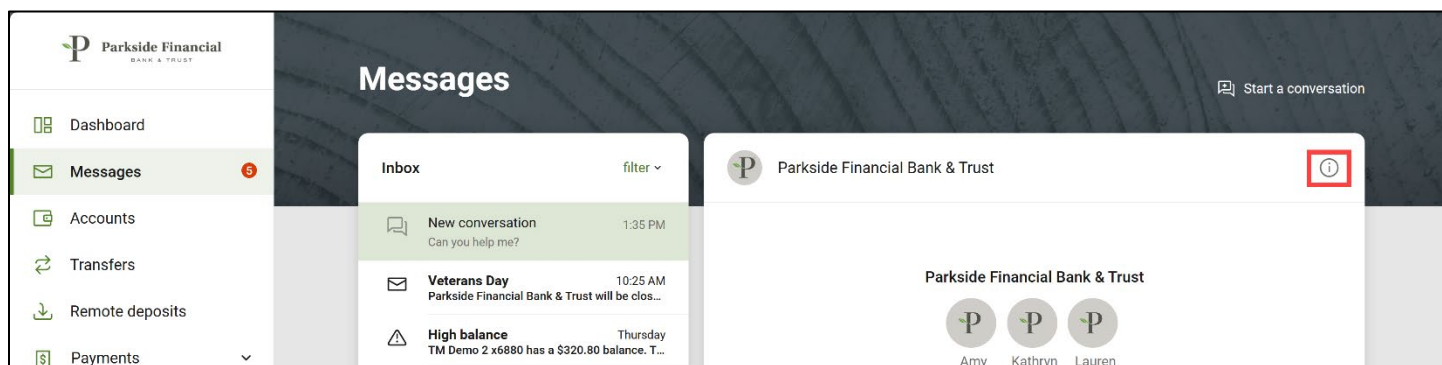
Step 2

Type your message in the field. Click the **+** to add transaction, account, or payment details to your message. You can also attach images or other files. Click **Send** when done.



Close/Delete a Message

Select the icon and click **Close conversation**. Closing a conversation deletes it.



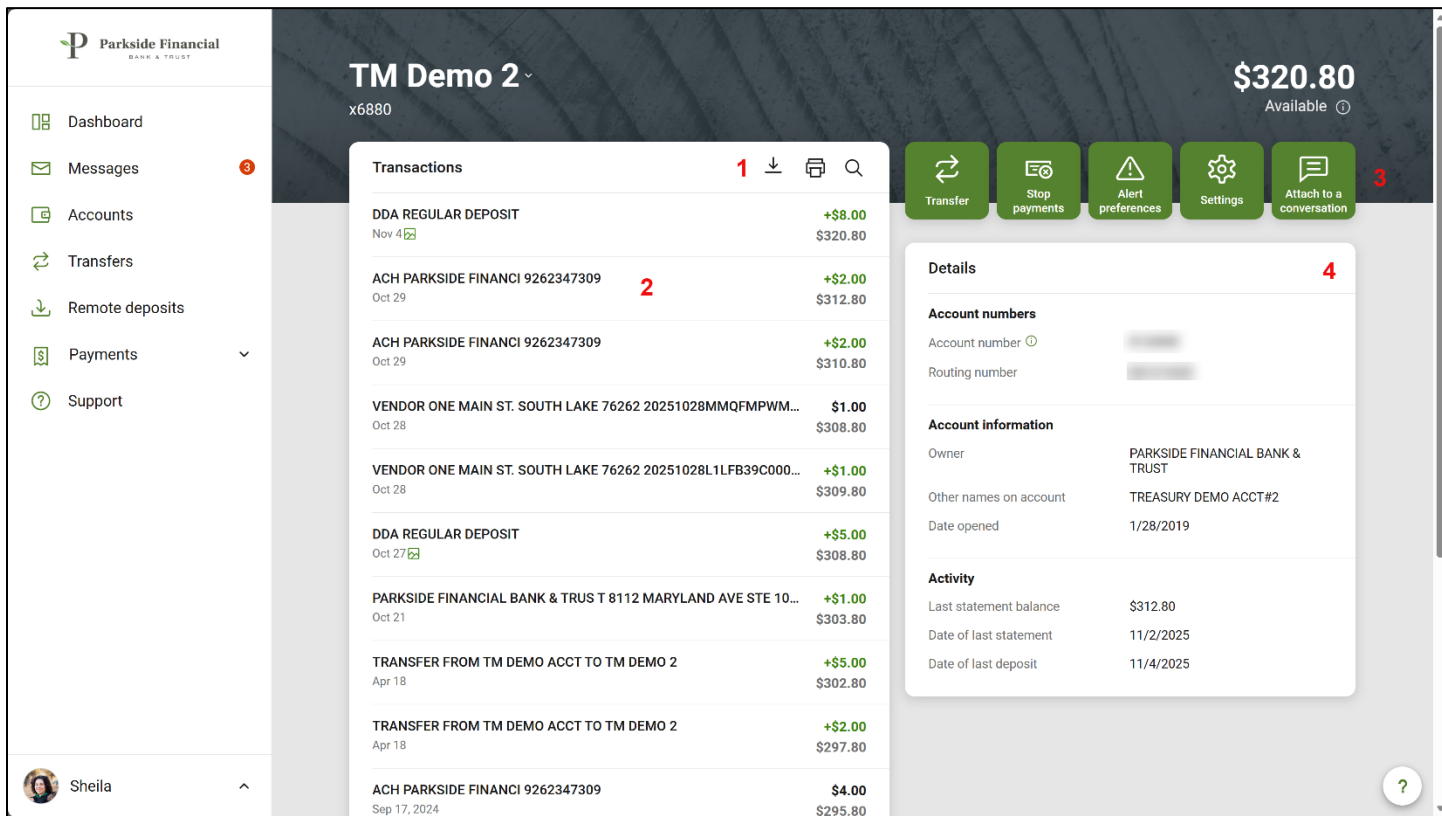
Accounts

Select **Accounts** to see a listing of all the accounts tied to your online banking ID.

Account Information

Select an account from the **Accounts** page or from the **Dashboard**.

1. Download into CSV, TXT, OFX, QBO or QFX format, print, or search transaction activity.
2. Review recent account activity.
3. Quickly access other features for this account.
4. Review account details such as account and routing numbers, account owners, and important dates.



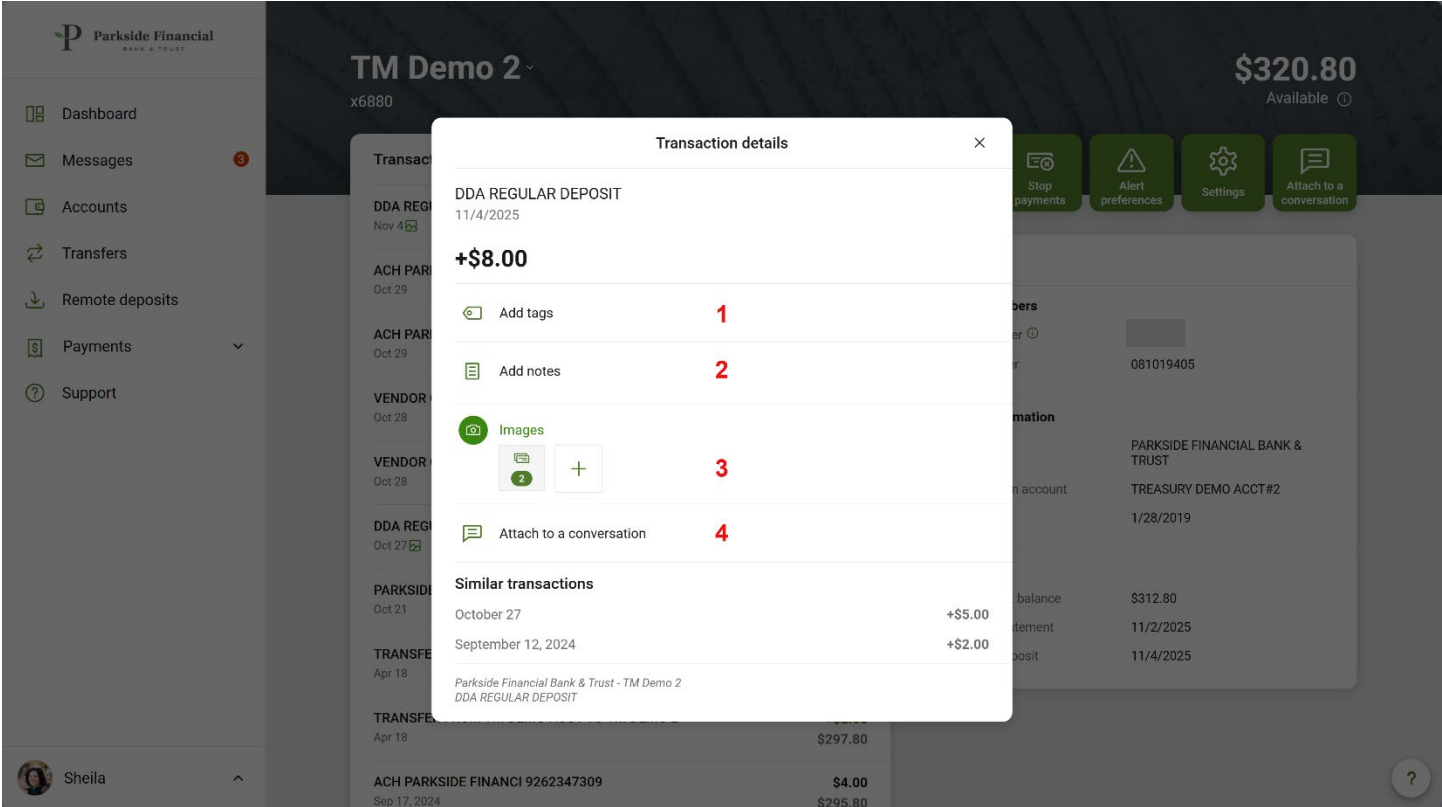
The screenshot displays the Parkside Financial digital banking interface. On the left is a navigation menu with options: Dashboard, Messages (with a red notification badge), Accounts, Transfers, Remote deposits, Payments, and Support. The main content area shows the account 'TM Demo 2' with a balance of \$320.80. Below the account name is a 'Transactions' table with a red notification badge (1) and icons for download, print, and search. The table lists several transactions, including DDA Regular Deposits, ACH transfers from Parkside Financial, and transfers from another TM Demo account. A red notification badge (2) is next to the ACH transfers. To the right of the transactions is a 'Details' panel (4) showing account numbers, account information (owner, other names, date opened), and activity (last statement balance, date of last statement, date of last deposit). A red notification badge (3) is next to the 'Details' panel. At the bottom left, the user's name 'Sheila' is displayed. A help icon (?) is at the bottom right.

Transaction Description	Amount	Date	Balance
DDA REGULAR DEPOSIT	+\$8.00	Nov 4	\$320.80
ACH PARKSIDE FINANCI 9262347309	+\$2.00	Oct 29	\$312.80
ACH PARKSIDE FINANCI 9262347309	+\$2.00	Oct 29	\$310.80
VENDOR ONE MAIN ST. SOUTH LAKE 76262 20251028MMQFMPWM...	\$1.00	Oct 28	\$308.80
VENDOR ONE MAIN ST. SOUTH LAKE 76262 20251028L1LFB39C000...	+\$1.00	Oct 28	\$309.80
DDA REGULAR DEPOSIT	+\$5.00	Oct 27	\$308.80
PARKSIDE FINANCIAL BANK & TRUS T 8112 MARYLAND AVE STE 10...	+\$1.00	Oct 21	\$303.80
TRANSFER FROM TM DEMO ACCT TO TM DEMO 2	+\$5.00	Apr 18	\$302.80
TRANSFER FROM TM DEMO ACCT TO TM DEMO 2	+\$2.00	Apr 18	\$297.80
ACH PARKSIDE FINANCI 9262347309	\$4.00	Sep 17, 2024	\$295.80

Transaction Details

Select a transaction to view additional information.

- 1. Add a **tag** to categorize the transaction.
- 2. Add **notes** to accompany the transaction description.
- 3. Review check **images** or add an image such as an invoice or receipt.
- 4. Attach the transaction details to a conversation with the institution.



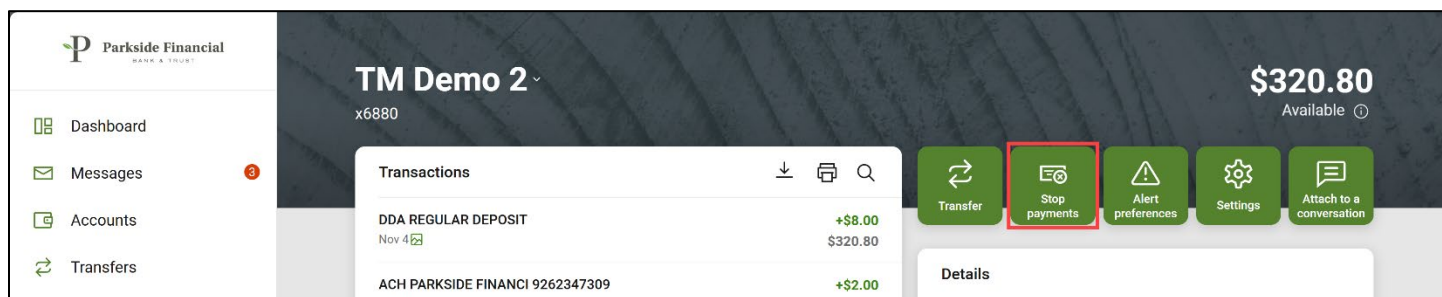
Stop Payments

You have the option to place a Stop Payment on either a single check or a range of checks via Online Banking. The Stop Payment Service Fee is displayed before finalizing the request. The stop remains active for six months, after which the payment(s) may proceed as normal. If you need assistance, wish to cancel a Stop Payment before the six-month period ends, or need to stop an ACH or recurring debit card transaction, please reach out to the bank by phone or through a Secure Message.

Place Stop Payment on a Single Check

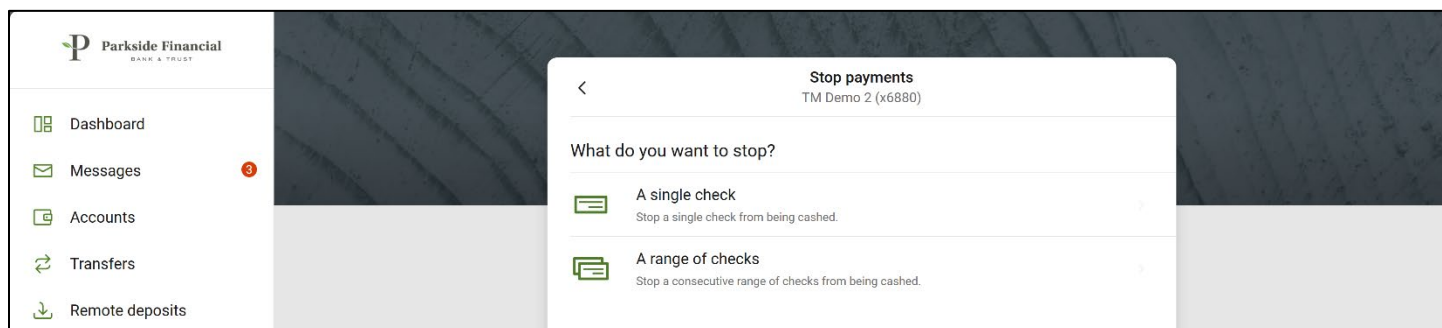
Step 1

Select **Stop payments** and select **+ Stop a payment**.



Step 2

Choose **A single check**.



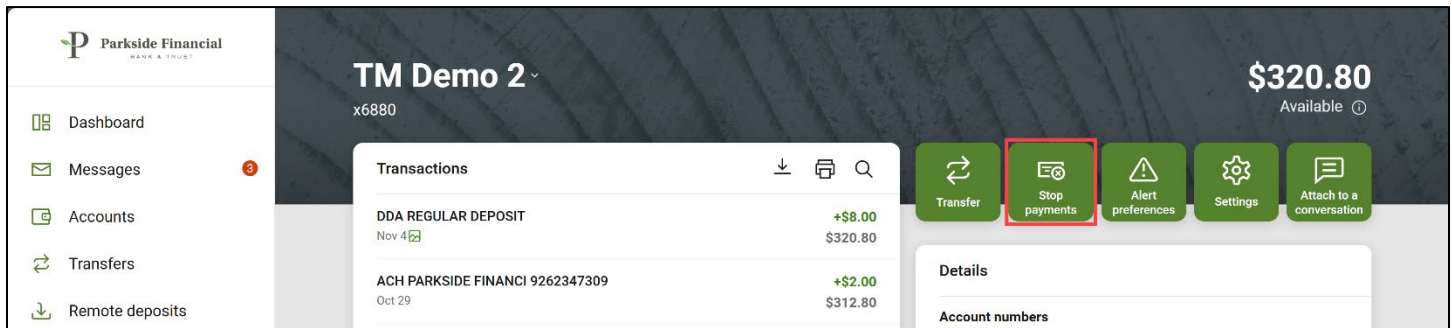
Step 3

Complete the details.

Place a Stop Payment on a Range of Checks

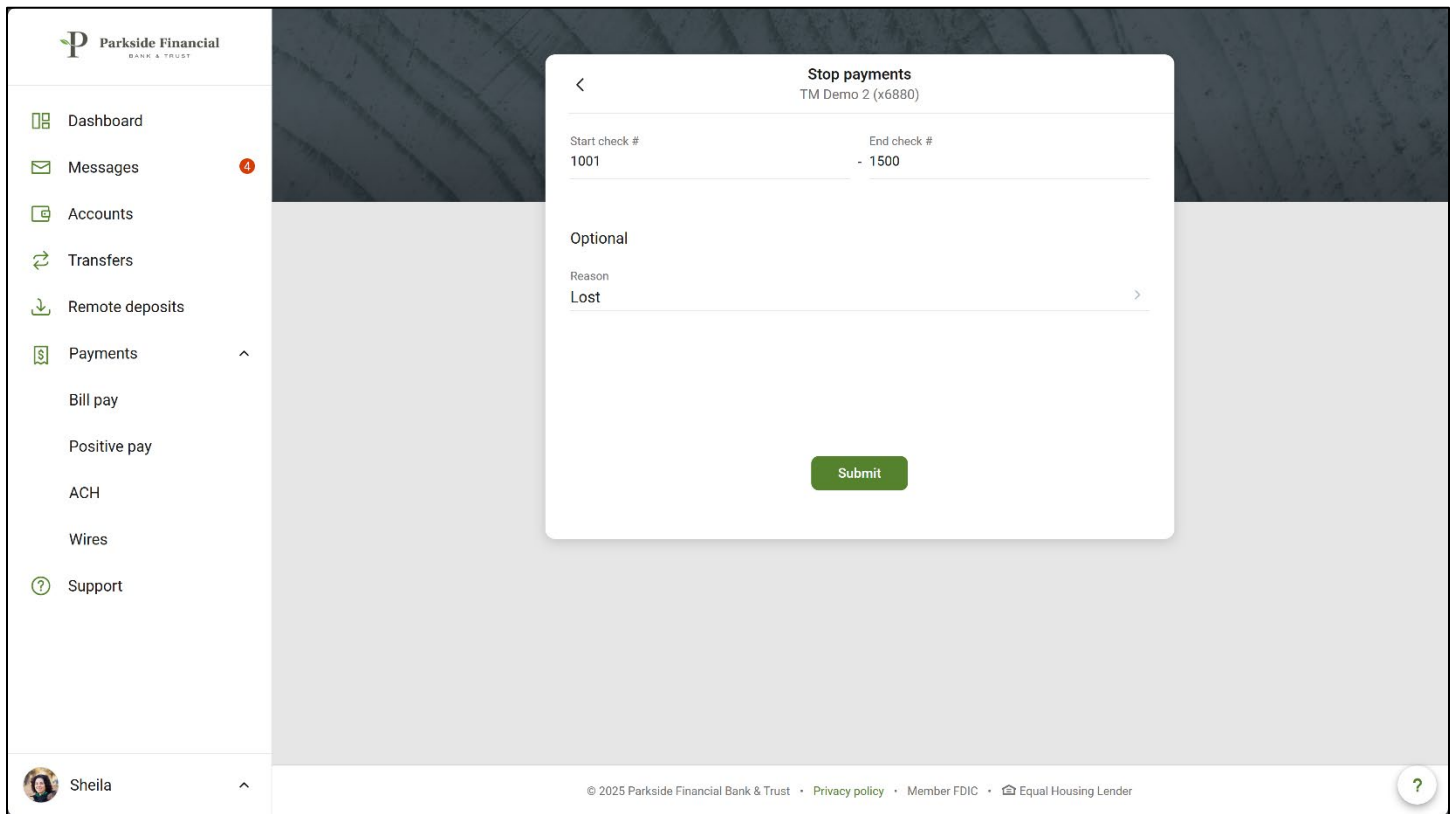
Step 1

Select **Stop payments** and select **+ Stop a payment**.



Step 2

Choose a **range of checks** and complete the details.



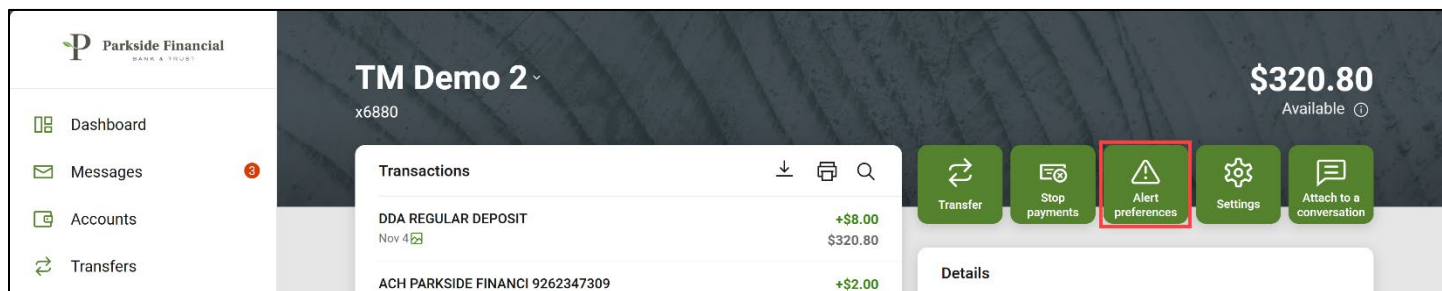
Alerts

Set up alerts to be notified about your balance or certain transactions.

Set up Balance and Transaction Alerts

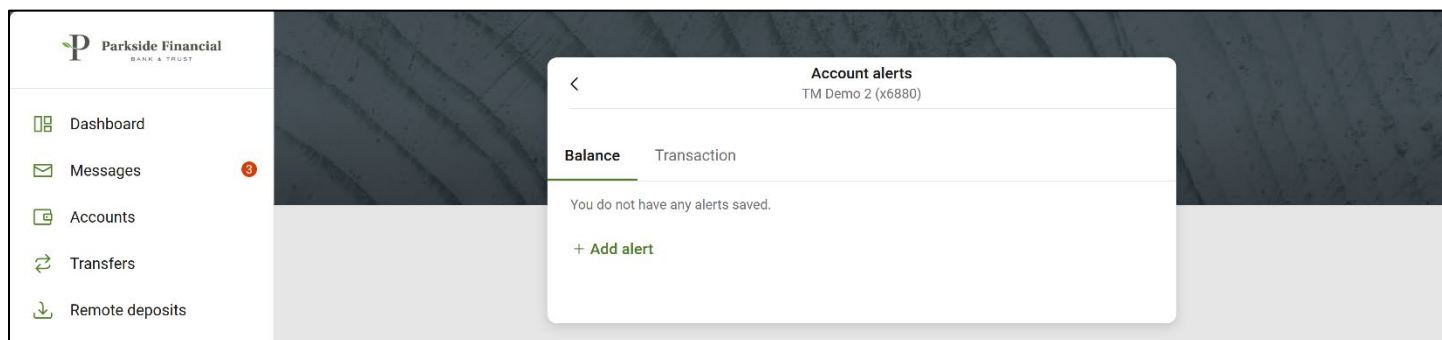
Step 1

Click **Alert Preferences** and select **Balances, transactions, and deposits**.



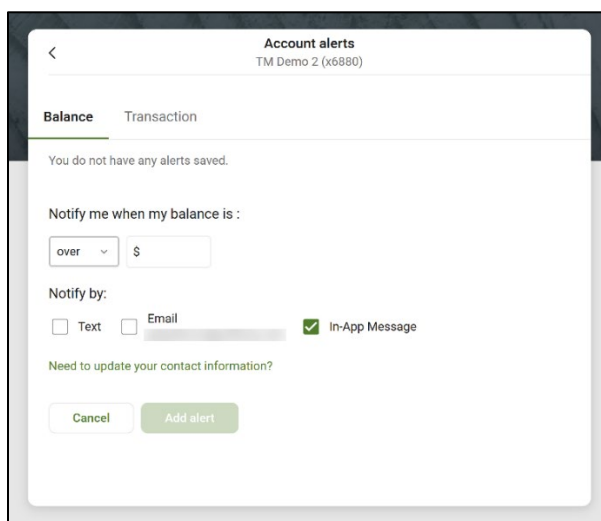
Step 2

Choose **Balance** or **Transaction** and click **+ Add alert**.



Step 3

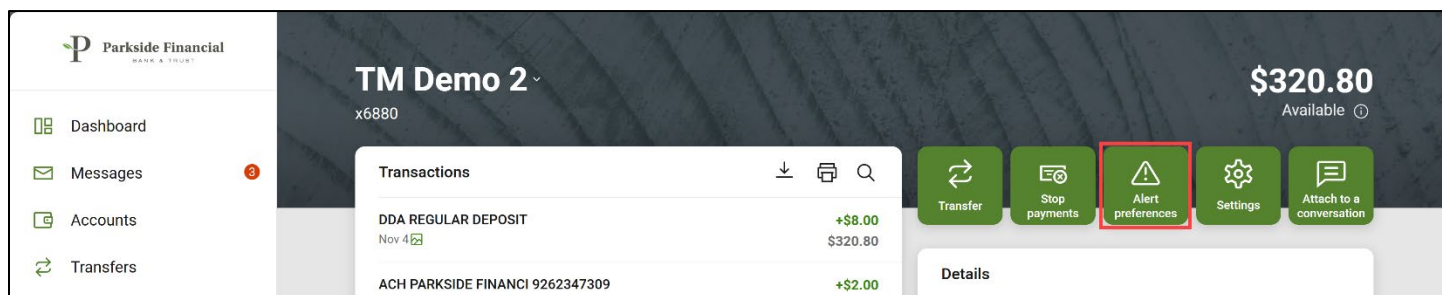
Complete the details and select how you'd like to receive the alert. Click **Add alert**.



Edit or Delete a Balance and Transaction Alert

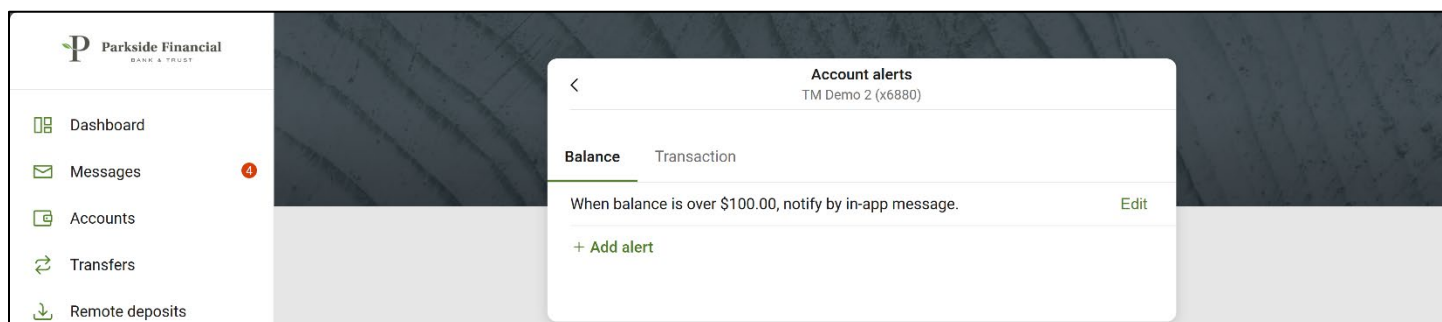
Step 1

From within the account, click **Alert Preferences** and select **Balances, transactions, and deposits**.



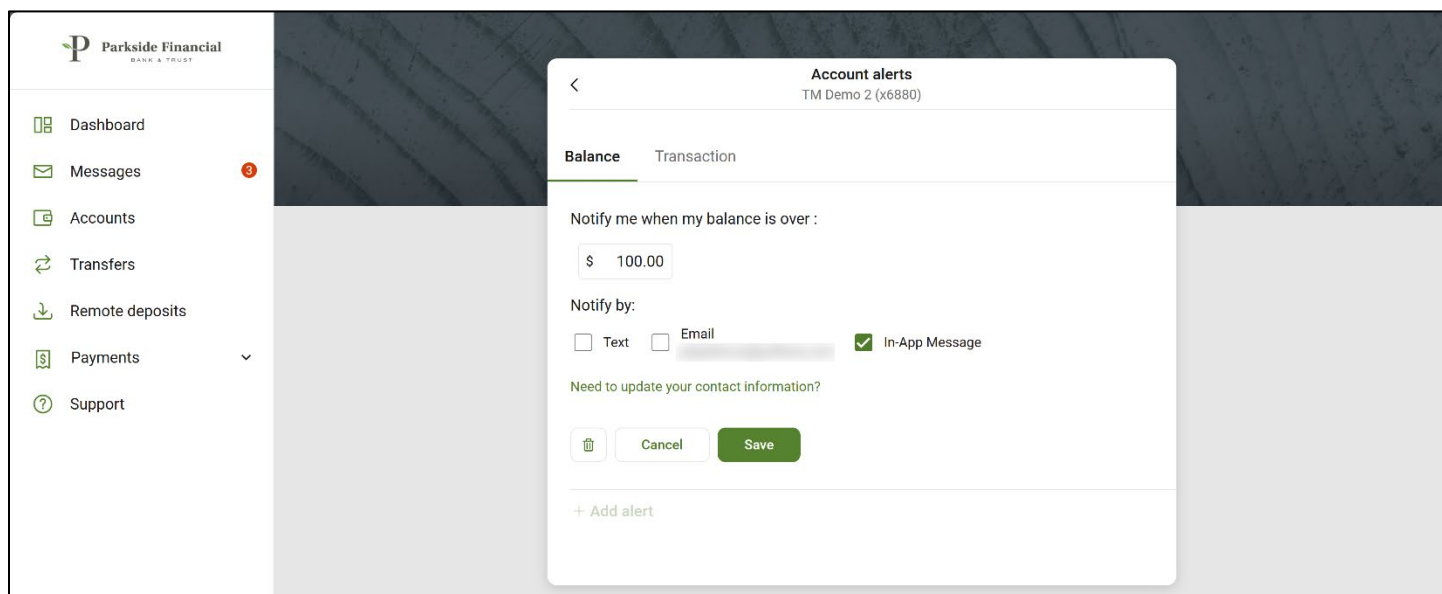
Step 2

Toggle between **Balance** and **Transaction** to find the alert to modify or delete. Select **Edit**.



Step 3

Modify the details or click the **trash can** icon to delete.

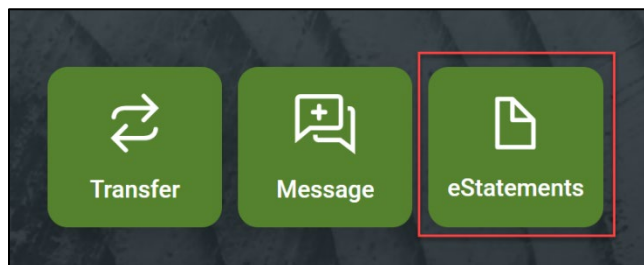


eStatements

Enroll for eStatements

Step 1

Select **eStatements** from the Dashboard.



Step 2

Complete the enrollment steps.

Click **Details** under Account(s) and Document Enrollment to choose the accounts and documents to enroll.

Confirm or modify your email address.

Read the disclosure and click **I Agree**.

You may choose to receive your statements 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. 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.

This agreement is made between you and Parkside Financial Bank & Trust and provides your request and consent to receive statements and notices that we make available for your deposit and loan account(s) by electronic delivery. These electronic statements and notices are called "eDocs".

By enrolling for eDocs, you are electing to receive your statement or notice by email and warrant that you are able to view and open the sample eDocs document indicating that your systems meet the requirements for utilizing eDoc delivery.

Click [here](#) to see a sample document.

Step 3

To change your enrollment or enroll a new account, click **Sign Up/Changes**. Check or uncheck the box to enroll or unenroll all documents for an account. Click the arrow on the lefthand side to pick and choose individual documents.

Documents

eStatements/Notices
Sign Up/Changes
Email Settings
Additional Recipients
Disclosures

Instructions: Below is a list of accounts and document types that are available for enrollment in electronic delivery. You may place a check next to any document you wish to enroll or place a check next to any account(s) in which you wish to enroll all documents. If you uncheck any document or account, you will be unenrolled in electronic delivery for those applicable documents and/or accounts. No selections will be saved until you select the "Save Settings" button.

☒ Enroll All Available Accounts and Document Types Shown

Enroll Accounts

> ☒ TM Demo Acct

> ☒ TM Demo 2

Save Settings Refresh

Step 4

To change the email address that is notified when new documents are available, click **Email Settings**. Enter the new email address and click **Save Settings**.

Documents

eStatements/Notices
Sign Up/Changes
Email Settings
Additional Recipients
Disclosures

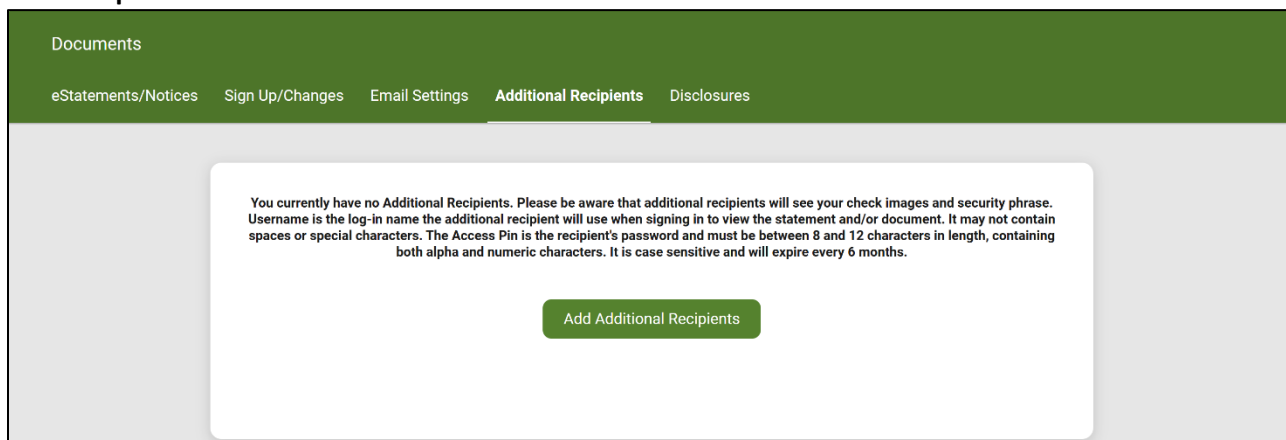
All documents will be sent to the following email address:

jdoe@testemail.com

Save Settings

Step 5

To enroll another person to receive your statements and notices, select the **Additional Recipients** tab and click **Add Additional Recipients**.



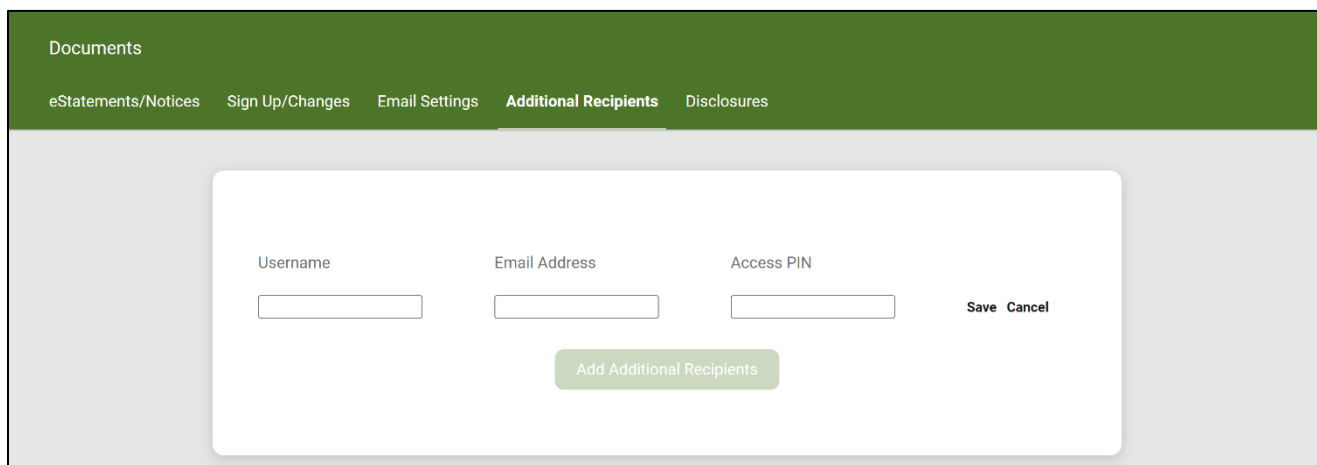
Documents

eStatements/Notices Sign Up/Changes Email Settings **Additional Recipients** Disclosures

You currently have no Additional Recipients. Please be aware that additional recipients will see your check images and security phrase. Username is the log-in name the additional recipient will use when signing in to view the statement and/or document. It may not contain spaces or special characters. The Access Pin is the recipient's password and must be between 8 and 12 characters in length, containing both alpha and numeric characters. It is case sensitive and will expire every 6 months.

Add Additional Recipients

Create a username, enter their email address, and set up a password for the recipient. Click **Save**.



Documents

eStatements/Notices Sign Up/Changes Email Settings **Additional Recipients** Disclosures

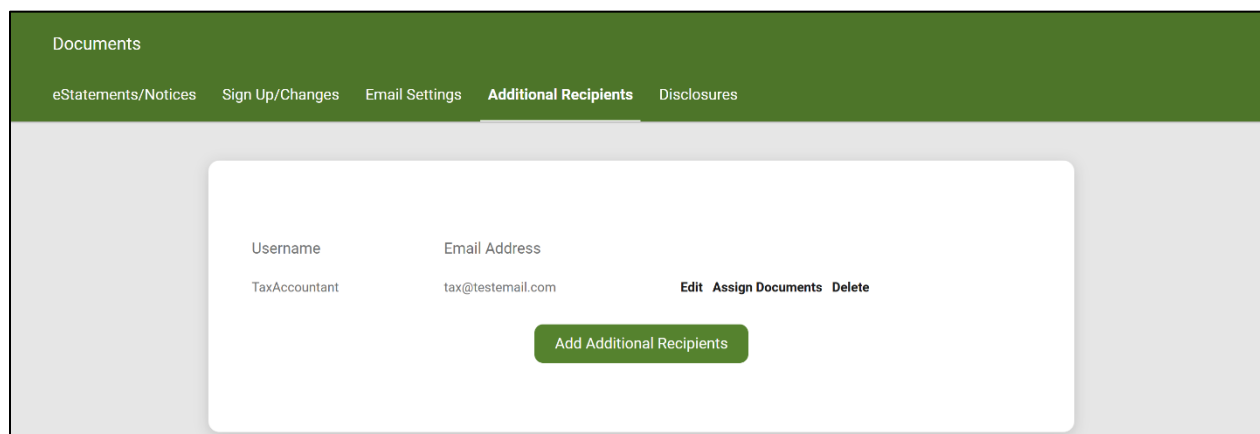
Username Email Address Access PIN

Save Cancel

Add Additional Recipients

Click **Assign Documents** and choose which documents should be emailed to the recipient. The recipient will receive an email with an attachment when a new document is generated. They will open the pdf attachment and enter their username and password in order to view it.

Please note: The recipient does not have access to log into your online banking account.



Documents

eStatements/Notices Sign Up/Changes Email Settings **Additional Recipients** Disclosures

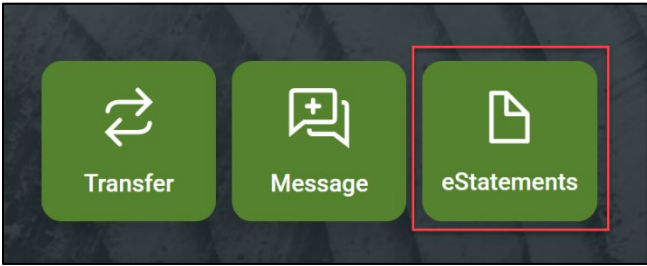
Username	Email Address	
TaxAccountant	tax@testemail.com	Edit Assign Documents Delete

Add Additional Recipients

View eStatements

Step 1

Select **eStatements** from the Dashboard.



Step 2

Select the **eStatements/Notices** tab, enter the filter criteria, and click **Filter**.

Documents

eStatements/Notices

Sign Up/Changes

Email Settings

Additional Recipients

Disclosures

Account(s)

All

Document Type

All

Date Range

Most Recent

Filter

Download

☐	Account	Date	Type	Description	Download
☐	TM Demo 2	06/30/2025	Statement	Statements June 2025	Download
☐	TM Demo 2	09/16/2024	Notice	ACH Customer Notice September 2024	Download
☐	TM Demo Acct	10/31/2025	Statement	Statements October 2025	Download
☐	TM Demo Acct	10/29/2025	Notice	ACH Customer Notice October 2025	Download
☐	TM Demo Acct	10/16/2025	Statement	Account Analysis Statement – Reviewed Accounts October 2025	Download

Select the document to view or click the download icon to save it to your computer.

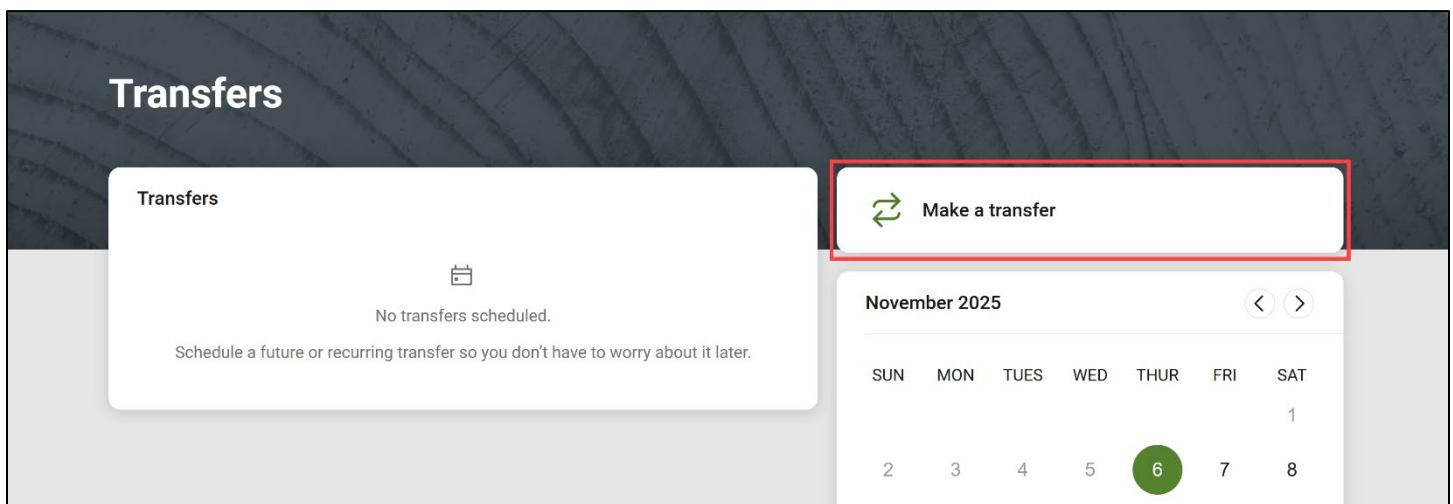
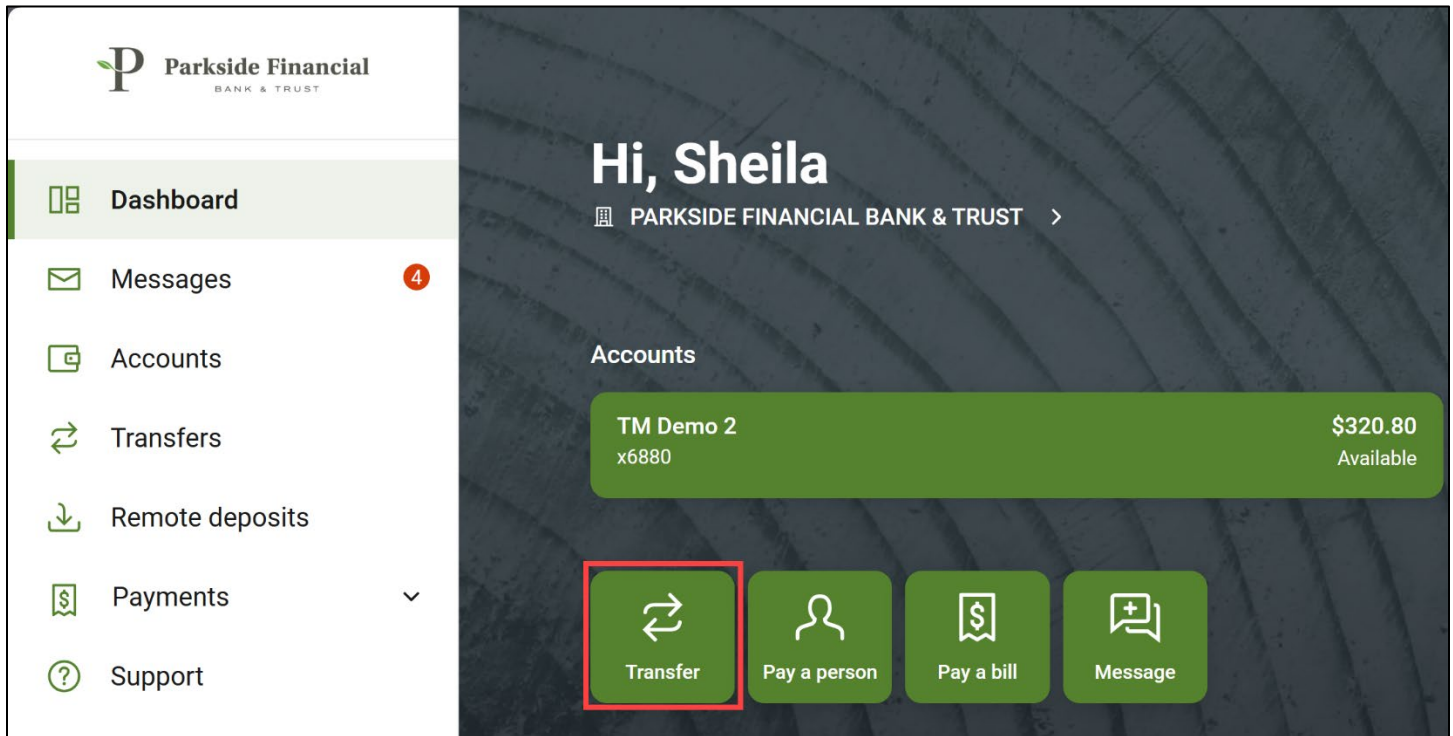
Transfers

Move money between internal accounts.

Submit a Transfer

Step 1

Click **Transfer** or **Make a Transfer** from the **Dashboard** or the **Transfers** page.



Step 2

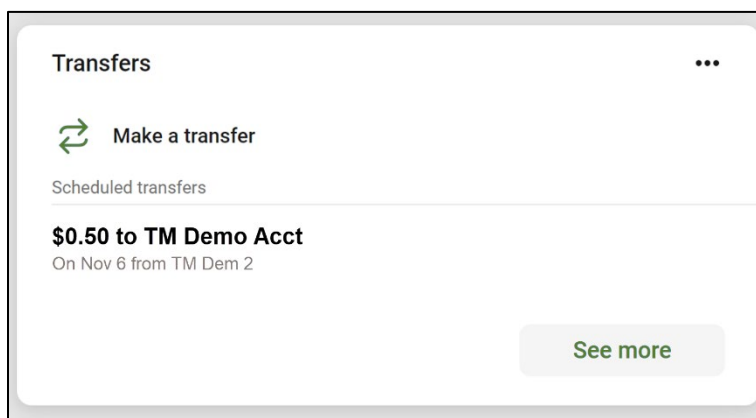
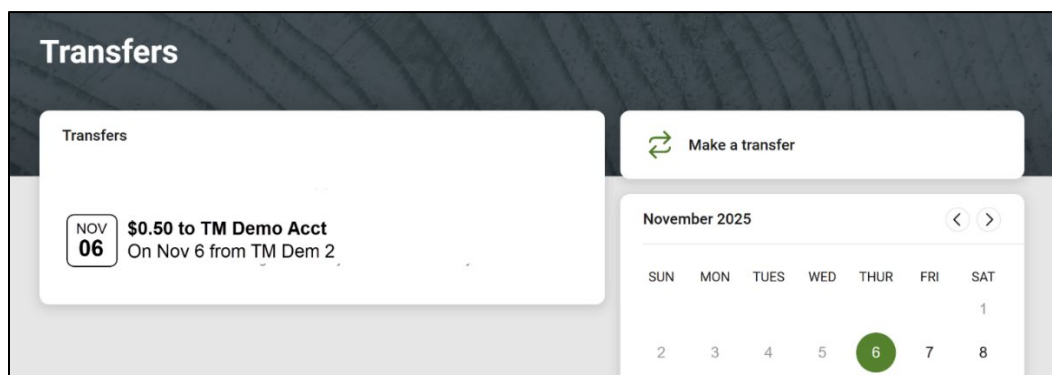
Select your **From** and **To** accounts and enter the amount to transfer.

Click **More options** to set up a recurring frequency, select a future date, or add a memo if applicable. Click **Submit**.

Edit or Delete a Transfer

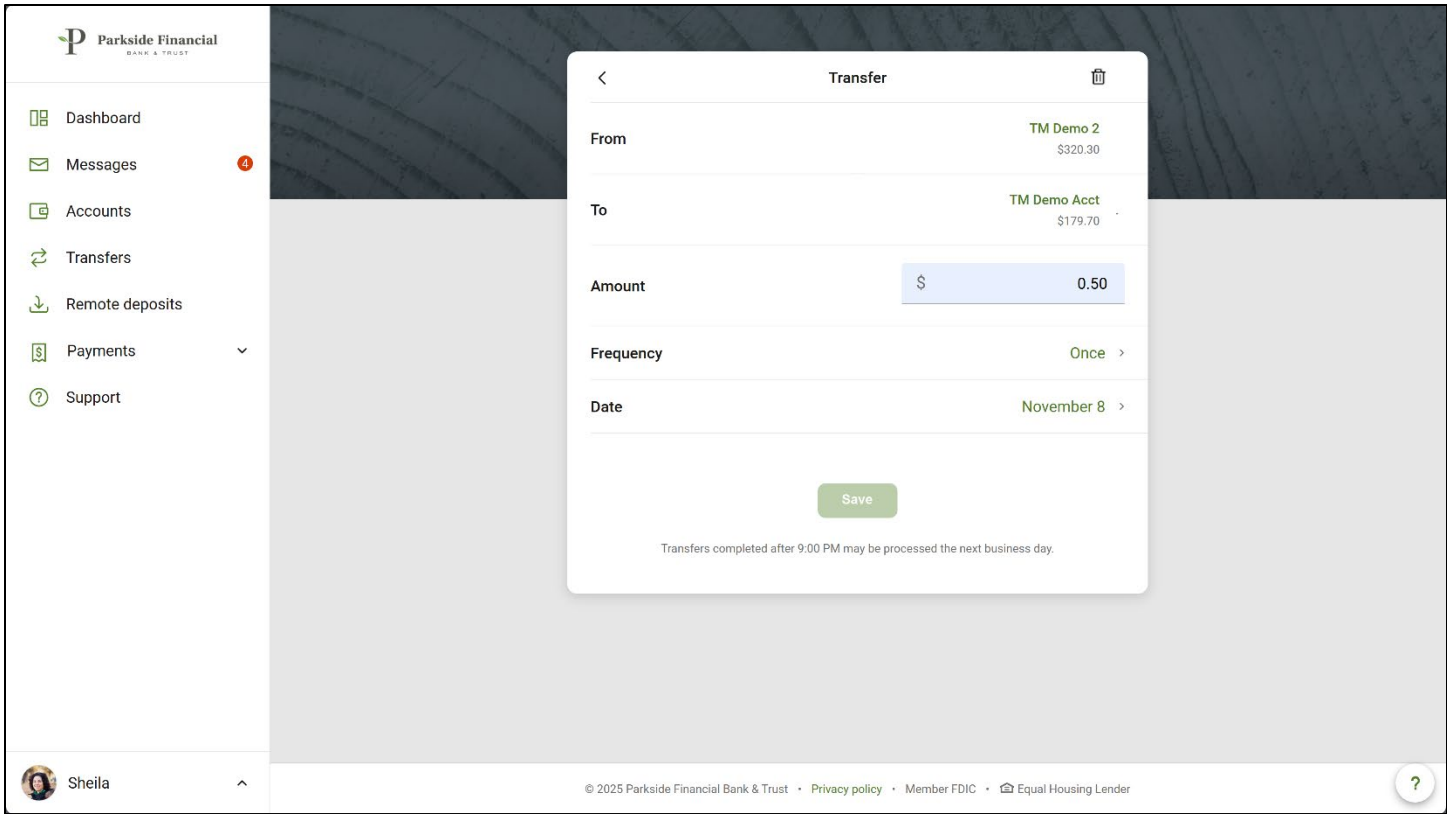
Step 1

Navigate to the **Transfers** card on the **Dashboard** or the **Transfers** page to find the transfer to edit or delete.



Step 2

Select the transfer and modify details or select the **trash can** icon to delete.



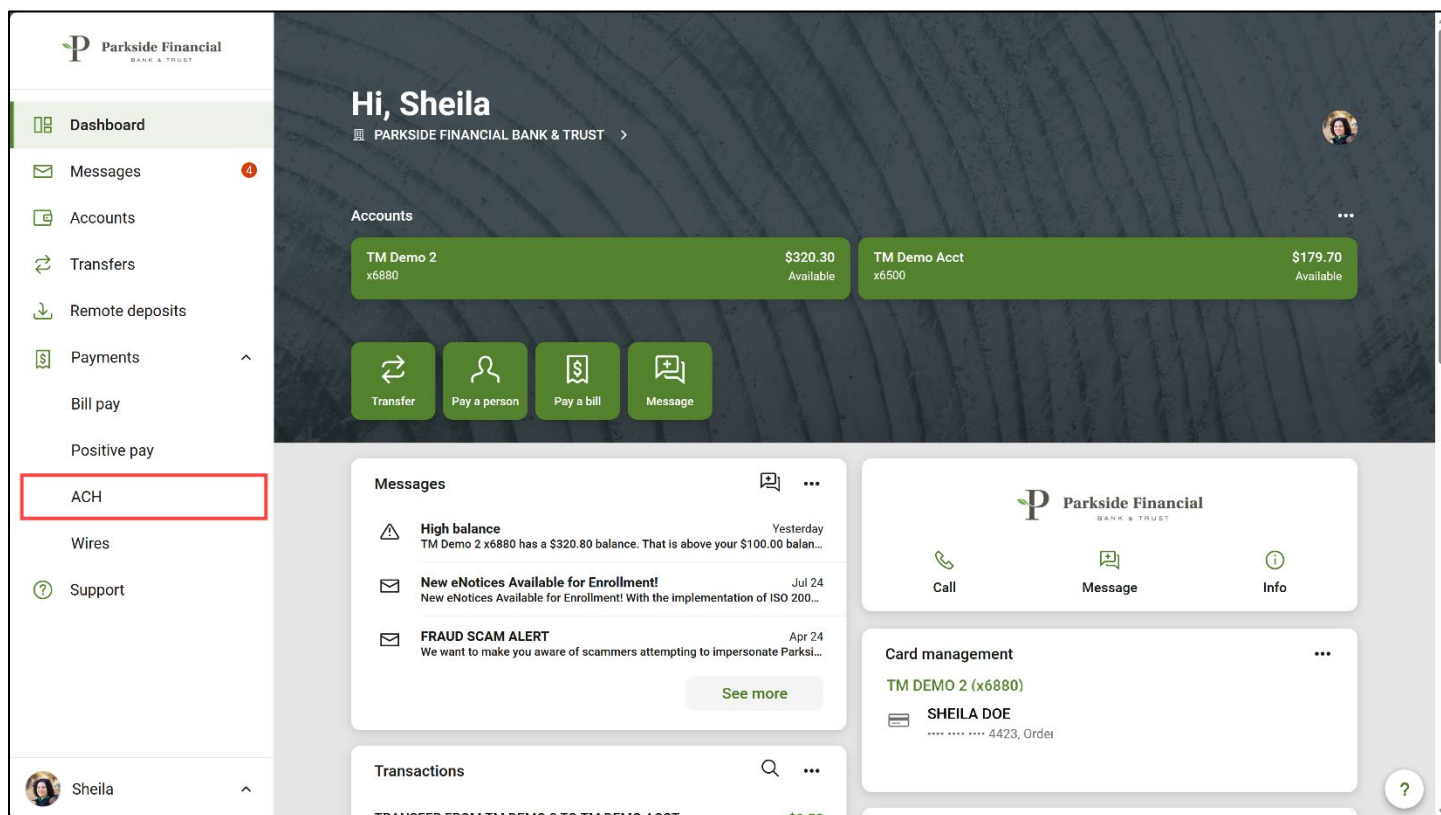
ACH

Create a Batch Manually

Step 1

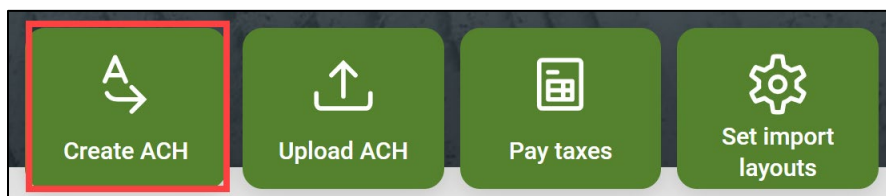
Select **ACH** from the navigation pane.

Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

Click **Create ACH**.



Step 3

Enter the **Batch name** and select the **ACH company** to originate the payment from.

The screenshot shows a mobile app interface for creating an ACH batch. The title is 'Create ACH'. There are two input fields: 'Batch name' and 'ACH name'. Below these is a 'Company' field with a dropdown menu that currently shows 'Select company >'. At the bottom of the form are two buttons: 'Cancel' and 'Create batch'.

Step 4

Confirm that the correct **SEC** code, **Entry description**, and **Discretionary data** display. Modify if necessary. Click **Add recipients**.

The screenshot shows the 'Create ACH' form with the following data entered: 'Batch name' is 'Payroll'; 'Company' is a blurred name; 'Company ID' is a blurred ID; 'SEC' is 'PPD'; 'Entry description' is 'PAYROLL'; 'Discretionary data' is 'PAYROLL'. The 'Recipients' field shows 'Add recipients >' which is highlighted with a red box. At the bottom are 'Cancel' and 'Create batch' buttons.

Step 5

Enter the **Recipient name**, the **amount** to pay them, transaction type (**Credit** or **Debit**), and account information.

Click **Optional fields** to enter a recipient ID number or addenda information.

Check **Prenote** to create a zero dollar batch for this transaction. This prenote batch may then be initiated to confirm account details prior to sending the live batch. (optional)

Check **Hold** to prevent this transaction from processing with the other transactions in the batch. (optional)

Click **+ Add another recipient** to enter another recipient. Click **Save recipient** when done adding recipients to the batch

<

Recipients



Employee One ^



Recipient name

Employee One

Amount

\$1.00

Credit/Debit

Credit

▼

Account number

123456789

Routing number

124084834



Account type

Checking

▼

FIRST CITIZENS BANK & TRUST...

Optional fields ▼

☐ Prenote

☐ Hold

+ Add another recipient

Save recipient

Step 6

Click **Create batch**, review the confirmation, then click **Done**.

Create ACH

Batch name: Payroll

Company: [Redacted]

Company ID: [Redacted]

SEC: PPD

Entry description: PAYROLL

Discretionary data: PAYROLL

Recipients: 2 recipients

Buttons: Cancel, **Create batch**

The batch will appear under the **Active** tab in a **Ready** status.
Please see the **Initiate a Batch** section for steps on how to send the payment.

ACH

Active | History

BATCH	AMOUNT
Payroll Ready	\$3.00 PPD

Buttons: Create ACH, Upload ACH, Pay taxes, Set import layouts

October 2025

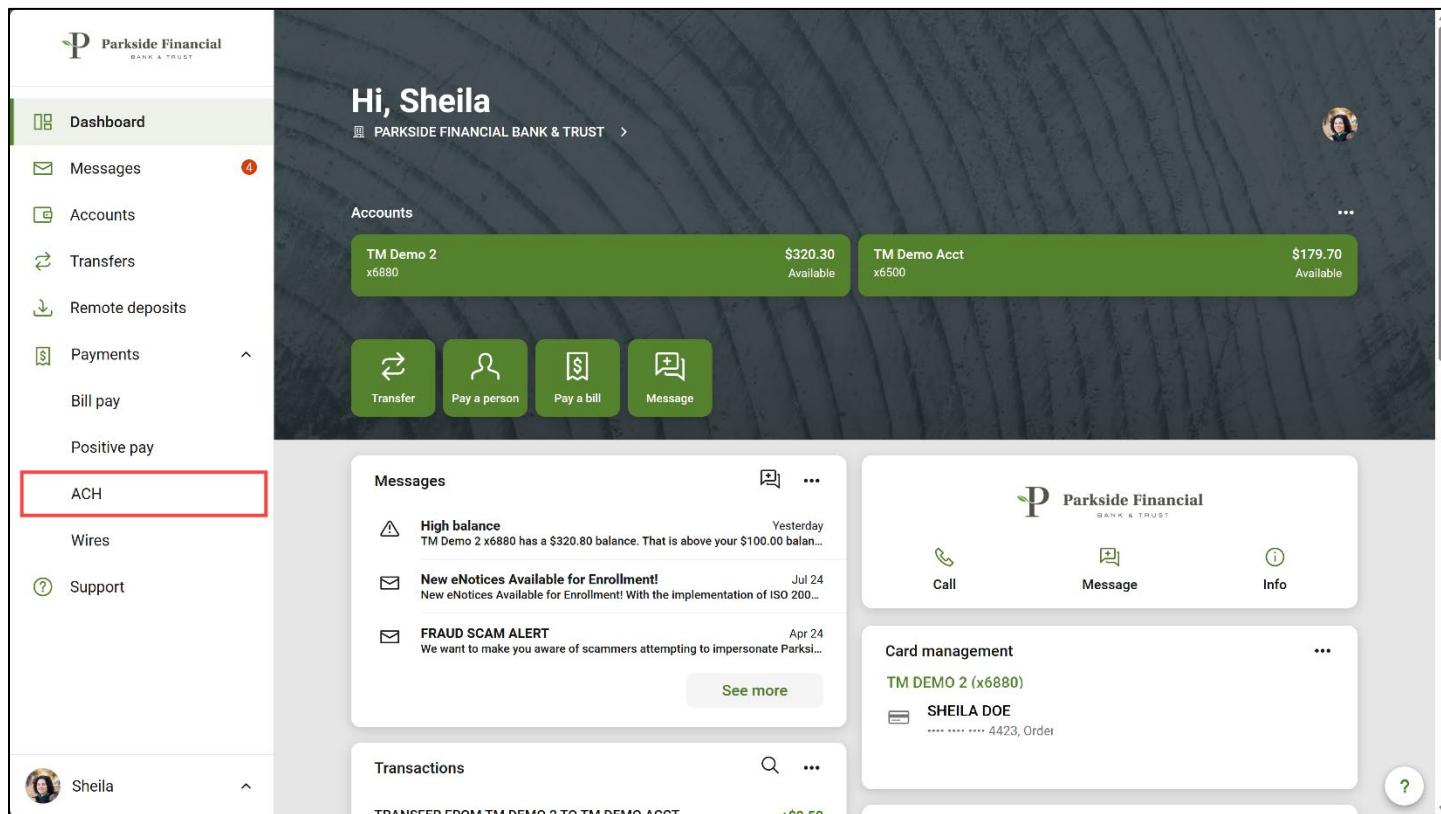
SUN	MON	TUE	WED	THUR	FRI	SAT
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Upload a NACHA File

Step 1

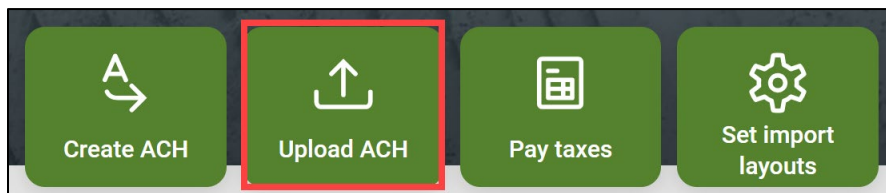
Select **ACH** from the navigation pane.

Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

Click **Upload ACH**.

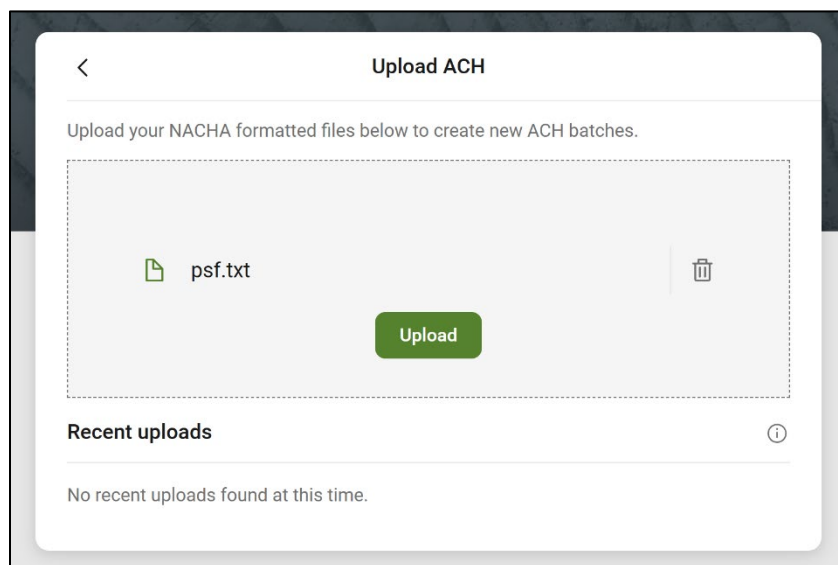


Step 3

Browse for your file and click **Upload**. Review your file for proper formatting if you receive an error.

The batch will appear under the **Active** tab in a **Ready** status.

Note: A generic name will be given to an uploaded batch. Select the batch and click **Edit** if you wish to change the name.



Please see the **Initiate a Batch** section in this document for steps on how to send the payment.

ACH

Active

History

BATCH

AMOUNT

Payroll

Ready

\$3.00

PPD

0000124

Ready

\$3.00

PPD

PARKSIDE FINANCI

Create ACH

Upload ACH

Pay taxes

Set import layouts

October 2025

SUN

MON

TUE

WED

THUR

FRI

SAT

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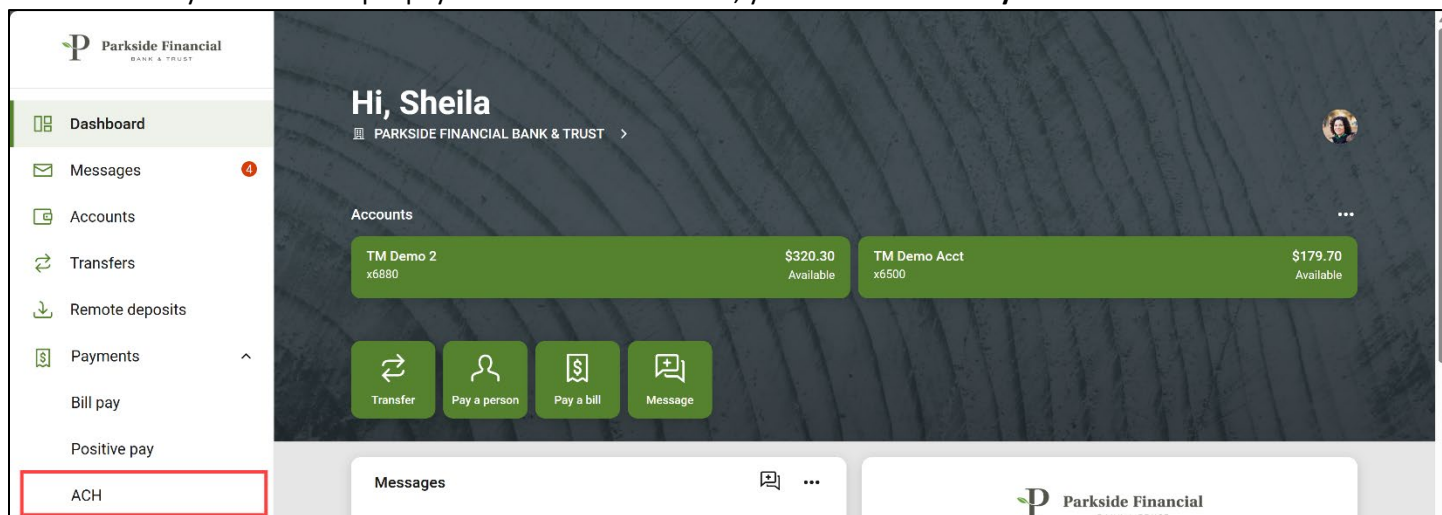
31

Import an ACH file

Step 1

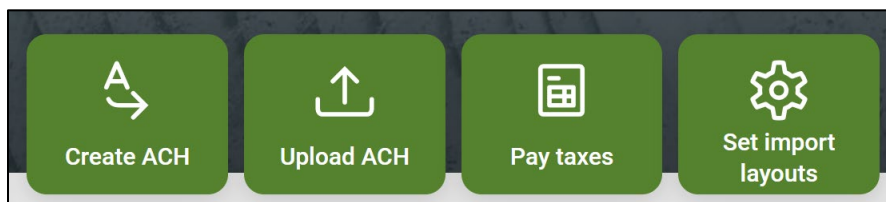
Select **ACH** from the navigation pane.

Please note: If you have multiple payment features activated, you will select the **Payments** menu first.



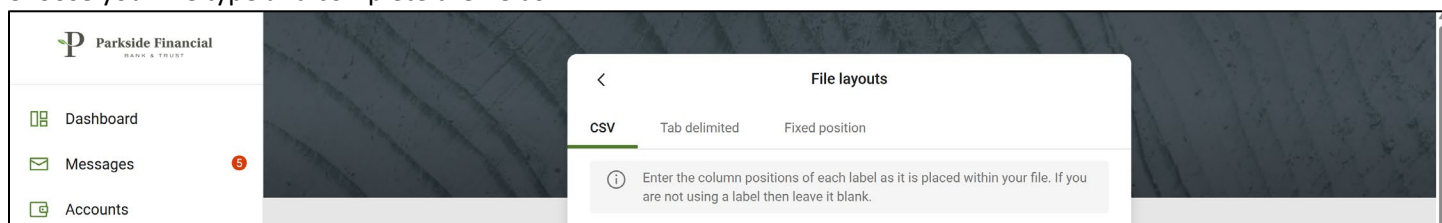
Step 2

Click **Set import layouts**.



Step 3

Choose your file type and complete the fields.



For CSV and Tab delimited files, enter the column numbers to align with your file.
For Fixed position files, enter the beginning and ending character positions for each field in your file.
If a field does not appear on your file, leave it blank.

<

File layouts

CSV

Tab delimited

Fixed position

i

Enter the column positions of each label as it is placed within your file. If you are not using a label then leave it blank.

Name

Column

1

Account number

Column

2

Routing number

Column

3

ID number

Column

4

Amount

Column

5

<

File layouts

CSV

Tab delimited

Fixed position

i

Enter the column positions each label begins and ends with as it is placed within your file. If you are not using a label then leave it blank.

Name

Start

1

End

22

Account number

Start

38

End

54

Routing number

Start

56

End

64

ID number

Start

68

End

82

Amount

Start

24

End

33

Enter the identifying characters to match your file. This is case sensitive. Then click **Save**.
Please note: If you use the Transaction code field for CSV files, this will not appear.

Checking equals

C

Savings equals

S

Debit equals

DR

Credit equals

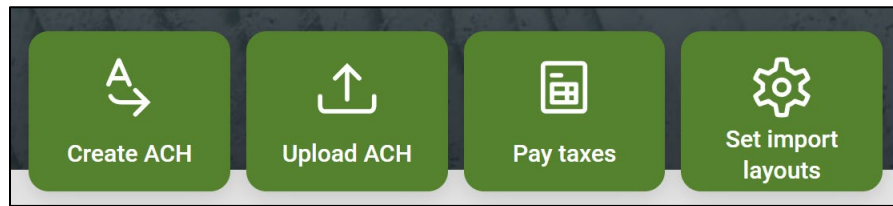
CR

Cancel

Save

Step 4

Select **Create ACH**.



Step 5

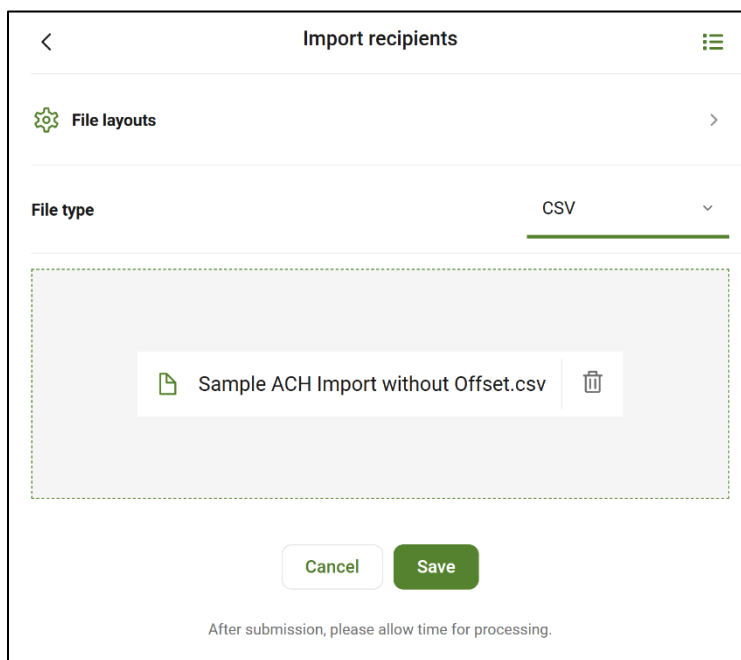
Enter the **Batch name** and select the **ACH company** to originate the payment from.

Step 6

Confirm that the correct **SEC** code, **Entry description**, and **Discretionary data** display. Modify if necessary. Click **Add recipients** and choose **Import from file**.

Step 7

Choose your **File type**, browse for your file, and click **Save**.



Import recipients

File layouts

File type CSV

Sample ACH Import without Offset.csv

Cancel Save

After submission, please allow time for processing.

Step 8

Click **Create batch**.

The batch will appear under the **Active** tab in a **Ready** status.

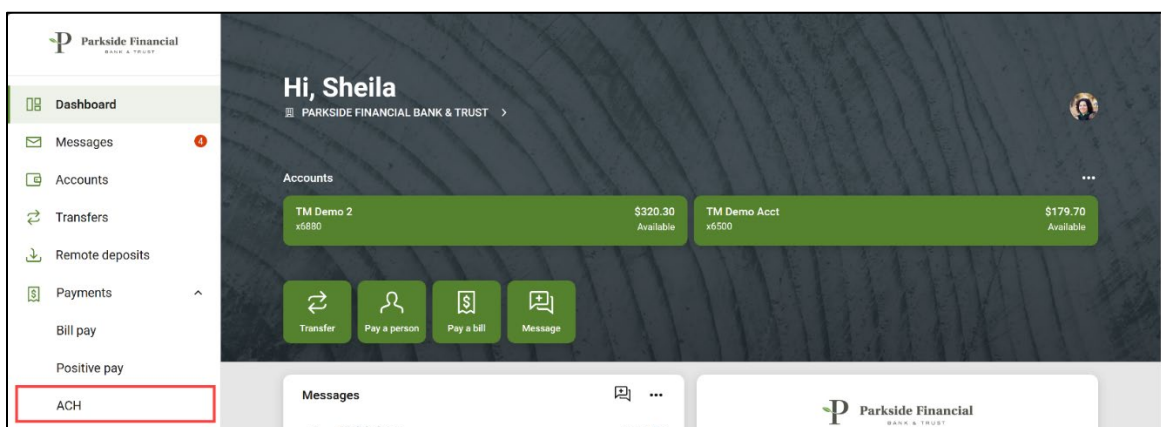
Please see the **Initiate a Batch** section for steps on how to send the payment.

Pay Taxes

Step 1

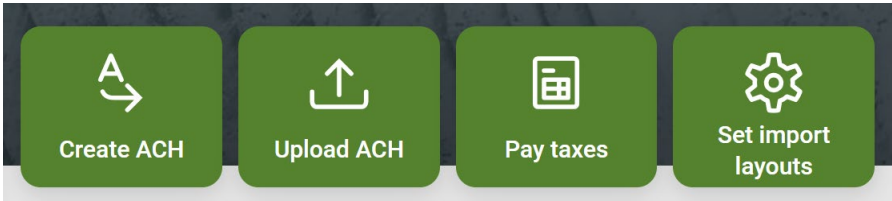
Select **ACH** from the navigation pane.

Please note: If you have multiple payment features activated, you will select the **Payments** menu first.



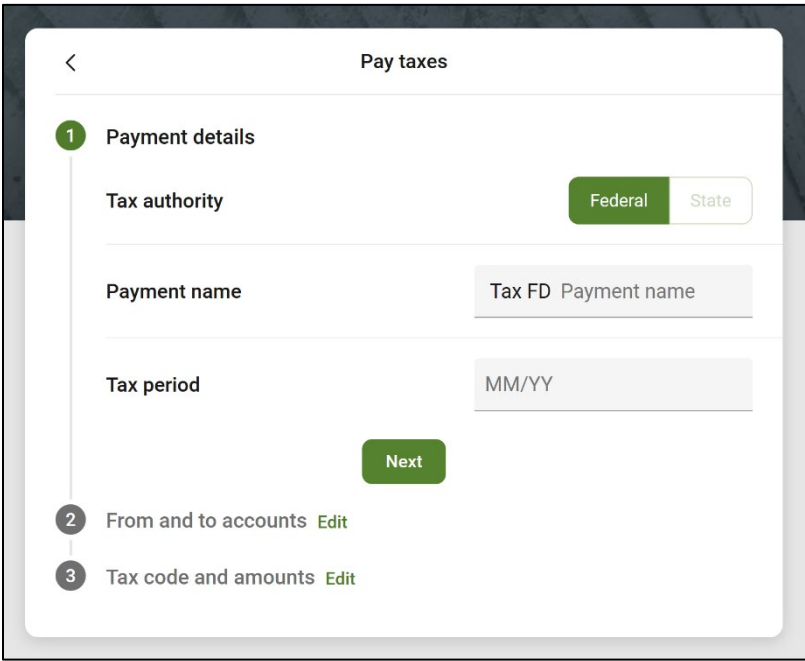
Step 2

Click **Pay taxes**.



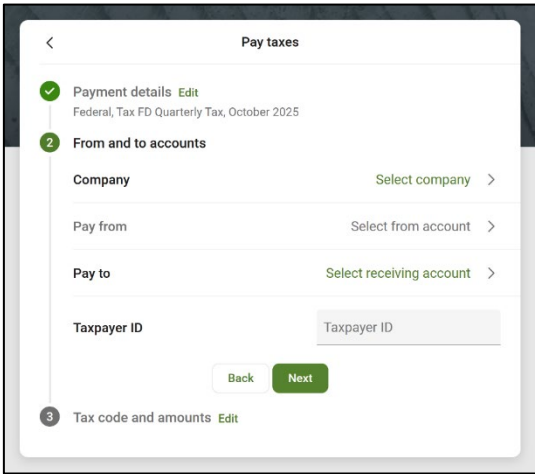
Step 3

Choose **Federal** or **State** taxes, enter a **Payment name**, and enter the **Tax period** in MM/YY format. Click **Next**.

A screenshot of a mobile app screen titled 'Pay taxes'. It shows a three-step process. Step 1, 'Payment details', is active and includes fields for 'Tax authority' (with 'Federal' and 'State' toggle buttons), 'Payment name' (with a text input field containing 'Tax FD Payment name'), and 'Tax period' (with a text input field containing 'MM/YY'). A green 'Next' button is at the bottom. Steps 2 and 3 are listed below with 'Edit' links.

Step 4

Select the ACH **Company** to originate the payment from, the **Pay from** account, the **Pay to** account, and enter your **Taxpayer ID**. Click **Next**.

A screenshot of the 'Pay taxes' screen at step 2, 'From and to accounts'. Step 1 is completed, indicated by a green checkmark and the text 'Federal, Tax FD Quarterly Tax, October 2025'. Step 2 includes fields for 'Company' (with a 'Select company' dropdown), 'Pay from' (with a 'Select from account' dropdown), 'Pay to' (with a 'Select receiving account' dropdown), and 'Taxpayer ID' (with a text input field). 'Back' and 'Next' buttons are at the bottom. Step 3 is listed below.

Step 5

Look up the **Tax code**, enter the **Amount**, and click **Create payment**.

Review your confirmation and click **Done**.

The tax payment batch will appear under the **Active** tab in a **Ready** status. Please see the *Initiate a Batch* section in this document for steps on how to send the payment.

<

Pay taxes

✓

Payment details [Edit](#)

Federal, Tax FD Quarterly Tax, October 2025

✓

From and to accounts [Edit](#)

From TM Demo 2 , to Bank of America

3

Tax code and amounts

Tax code

Lookup tax code >

Amount

\$0.00

Back

Create payment

ACH

ActiveHistory

BATCH

Tax FD Quarterly Tax

Ready

\$1.00

PPD

Create ACH

Upload ACH

Pay taxes

Set import layouts

October 2025

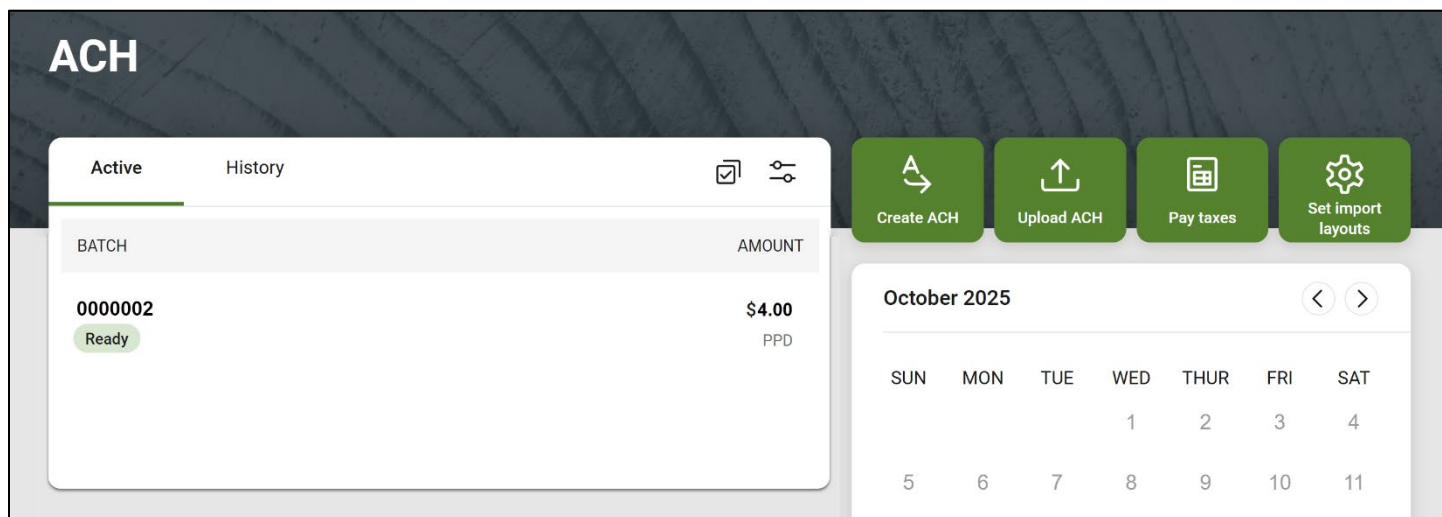
SUN	MON	TUE	WED	THUR	FRI	SAT
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Edit or Delete a Batch

Please note: Batches in an initiated or processed status cannot be edited or deleted. Please uninitiate the batch first or contact the bank for assistance.

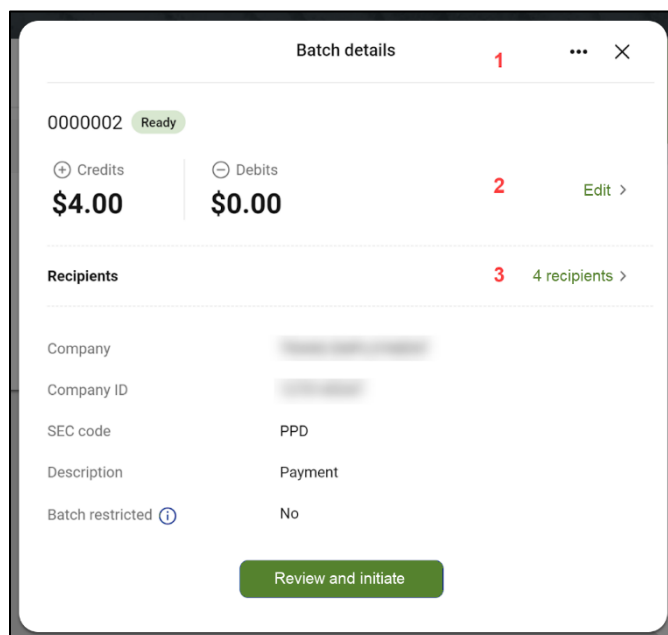
Step 1

Click **ACH** from the Dashboard and select the batch.



Step 2

1. Select the ellipsis icon to delete the batch.
2. Click **Edit** to modify the batch header information.
3. Click **Recipients** to add, delete, or modify the recipient(s) account information or payment amount(s).

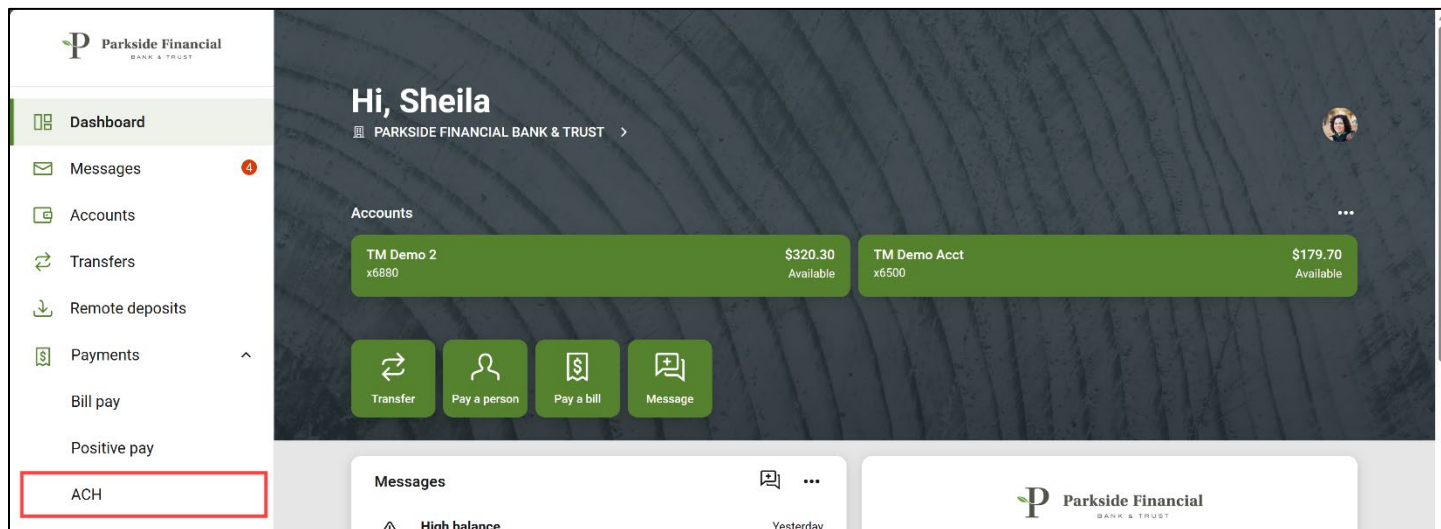


Initiate a Batch

Step 1

Select **ACH** from the navigation pane.

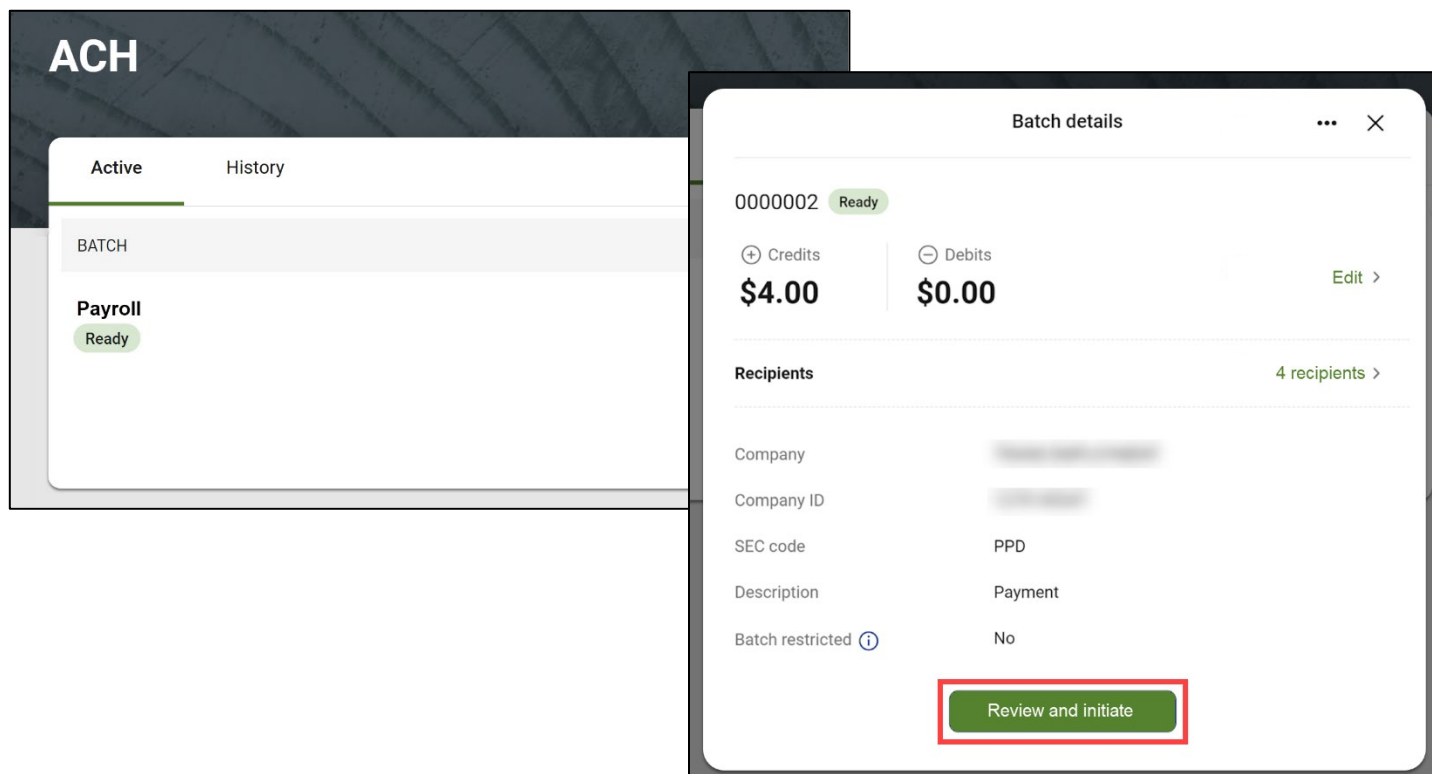
Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

Select the batch in a **Ready** status and click **Review and initiate**.

Please note: If dual control is activated, you cannot initiate a batch that you created or edited. A second user will need to complete this step.



Step 3

Select the **Offset account** if applicable, recurring **Frequency** if applicable, and the **Effective date**.

Check the Reset amounts to \$0.00 after processing if you'd like to clear out the dollar amounts in the template after processing. (optional)

Click **Initiate**.

You may be asked to enter your password to authenticate.

Review your confirmation and click **Done**.

The batch will appear in an **Initiated** status under the **Active** tab.

Please note: Batches in an Initiated status may be uninitiated up until our cut off. Please see the **Uninitiate a Batch** section in this document for more information.

The batch will return to a **Ready** status after processing and may be reused, edited, or deleted.

The screenshot shows a mobile application interface for initiating an ACH batch. The form is titled "Initiate ACH" and is set against a dark background. It contains the following elements:

- Payroll Section:** Displays "Credits" with a plus icon and "\$4.00", and "Debits" with a minus icon and "\$0.00". Below this is a "Show details" link with a downward arrow.
- Offset account:** A field showing "Checking account x6880" with a right-pointing arrow.
- Frequency:** A field showing "Once" with a right-pointing arrow.
- Effective date:** A field showing "Nov 8" with a right-pointing arrow.
- Reset amounts:** A checkbox labeled "Reset amounts to \$0.00 after processing", which is currently unchecked.
- Buttons:** At the bottom, there are two buttons: a light gray "Cancel" button and a green "Initiate" button.



Batch initiated

Payroll

⊕ Credits

\$4.00

⊖ Debits

\$0.00

📅 Effective date

Nov 8

Confirmation #

1028240018

Recipients

4

Done

ACH

ActiveHistory

📋

🔗

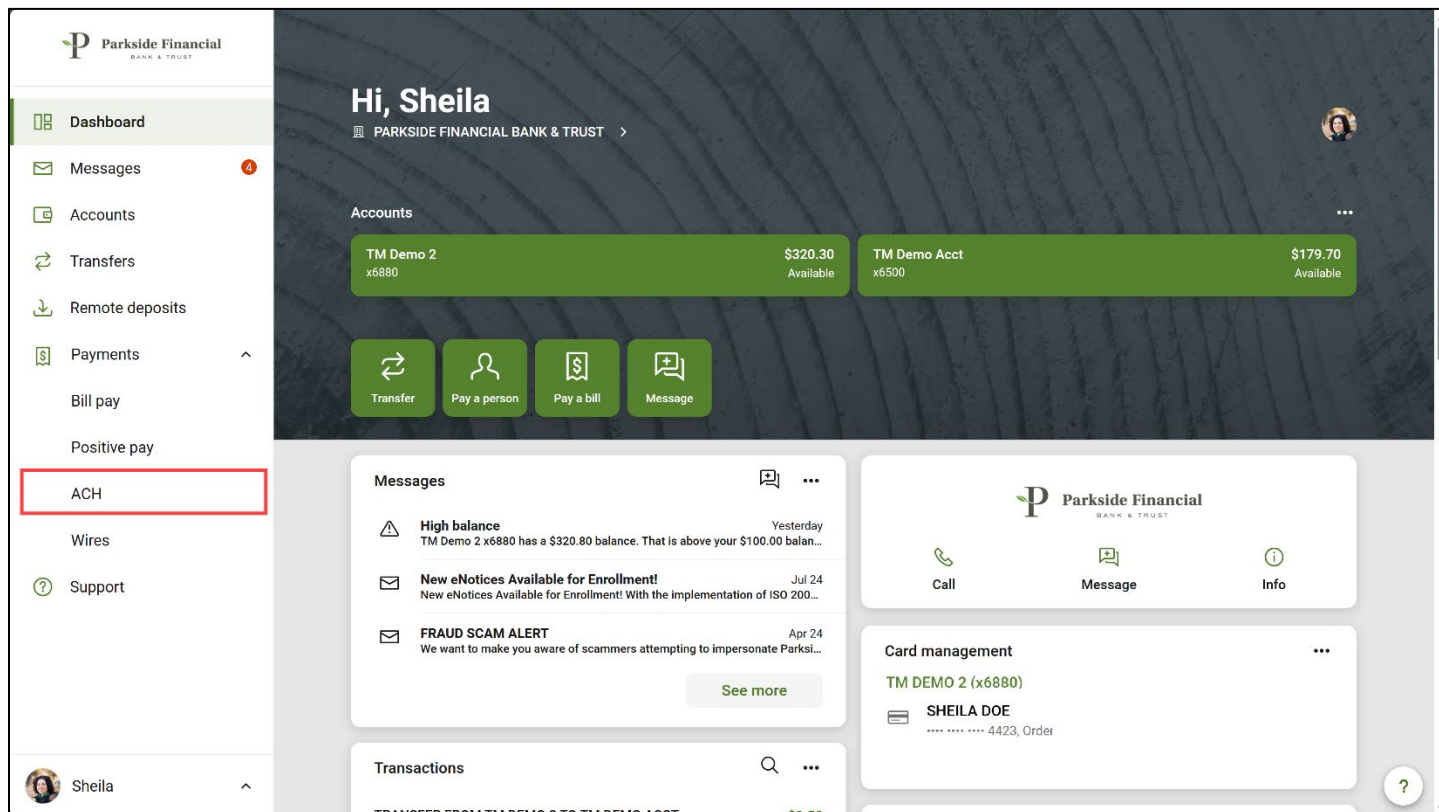
BATCH	AMOUNT
Payroll Initiated	\$4.00 PPD

Initiate Multiple Batches

Step 1

Select **ACH** from the navigation pane.

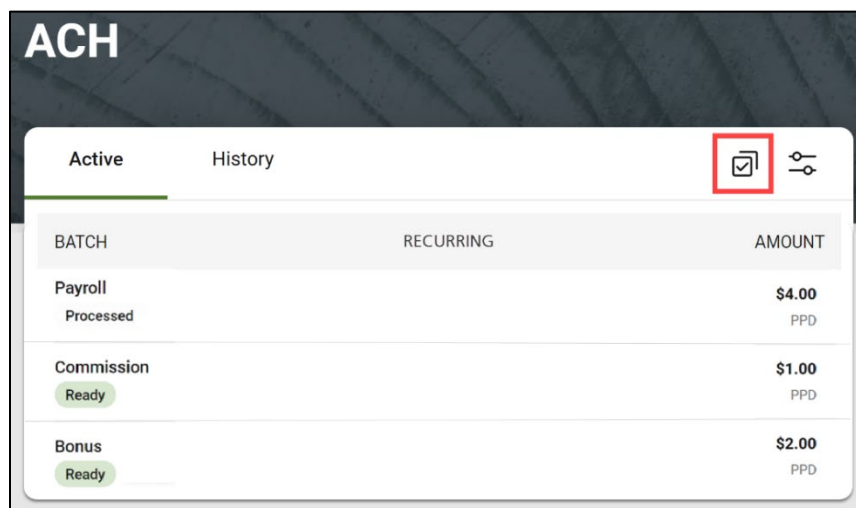
Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

Click the **Bulk Action** icon and select the batches you want to initiate. Click **Initiate**.

Please note: If dual control is activated, you cannot initiate a batch that you created or edited. A second user will need to complete this step.



ACH

2 selected: Initiate

Cancel

☐	BATCH	RECURRING	AMOUNT
☐	Payroll Processed		\$4.00 PPD
☒	Commission Ready		\$1.00 PPD
☒	Bonus Ready		\$2.00 PPD

Step 3

Enter the **Effective date**, select the **Offset account** if applicable, and check the **Reset to \$0** box if desired for each batch. Click **Initiate**.

You may be asked to enter your password to authenticate.

Review your confirmation and click **Done**. The batches will appear in an Initiated status under the **Active** tab.

<

Initiate batches

Comisson \$1.00

Nov 8

Checking account (x6880)

☐ Reset to \$0

Bonus \$2.00

Nov 8

Checking account (x6880)

☐ Reset to \$0

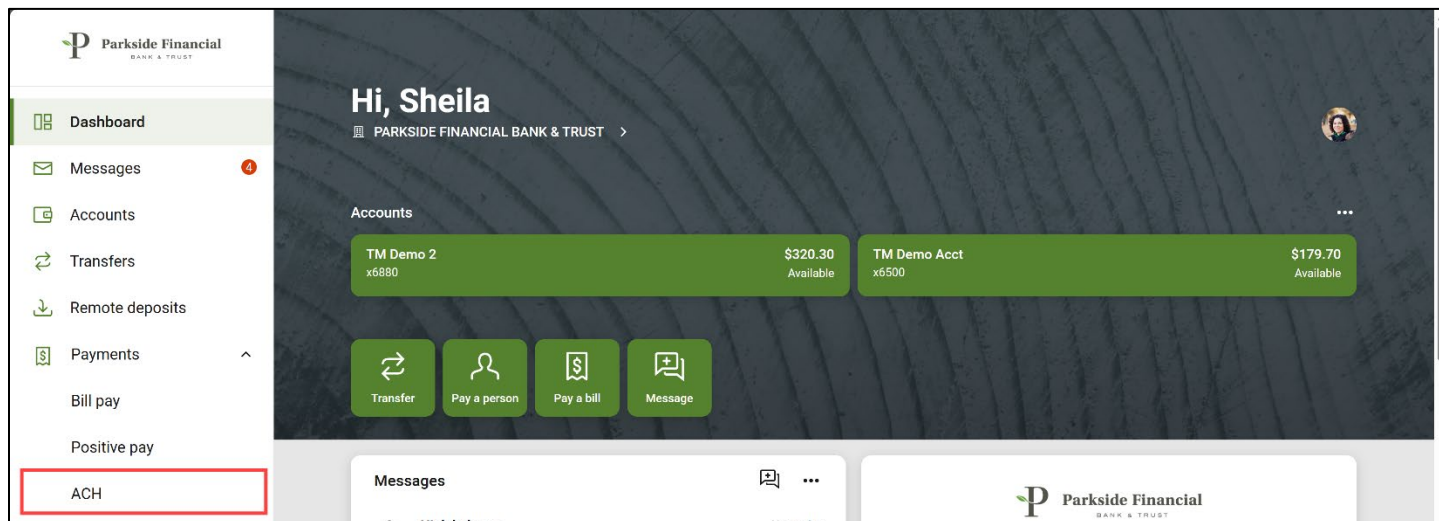
Initiate 2 batches

Uninitiate a Batch

Step 1

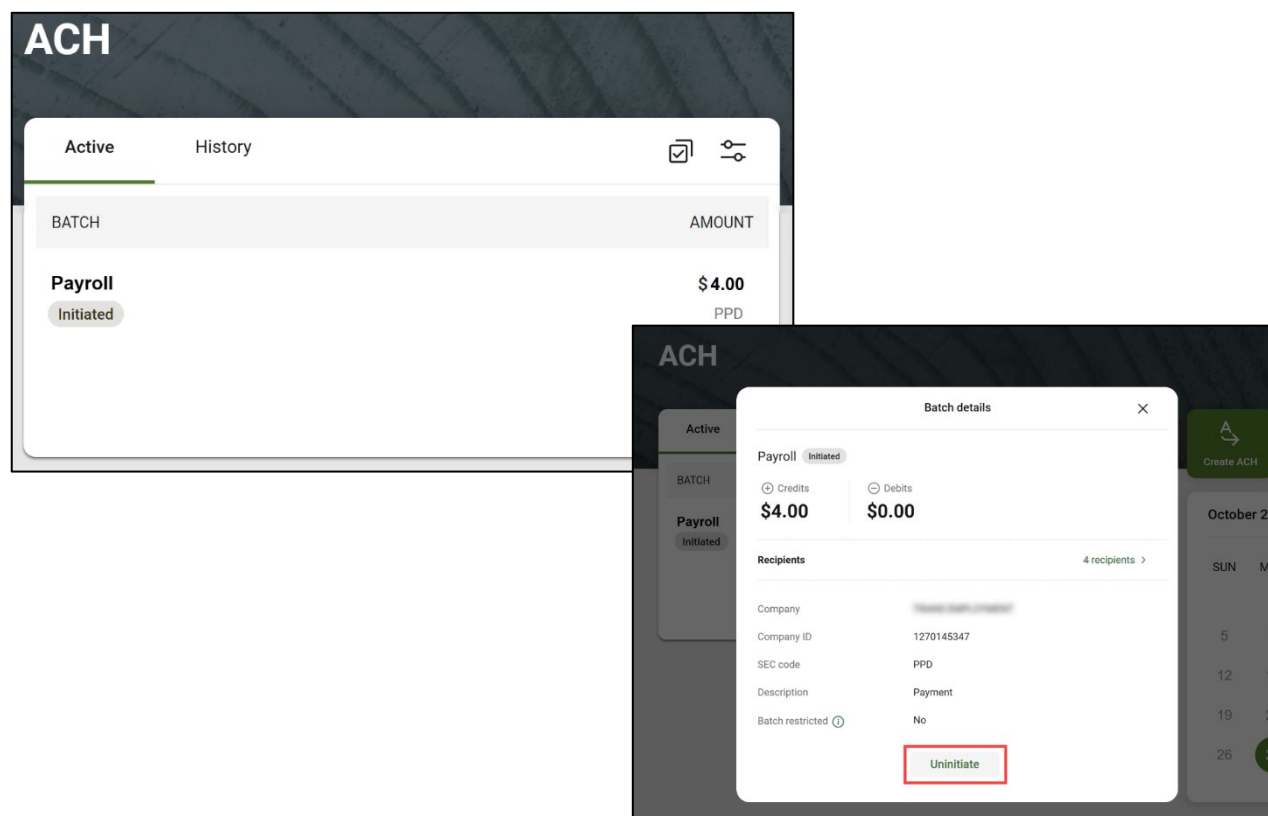
Select **ACH** from the navigation pane.

Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

Select the batch in an Initiated status, click **Uninitiate**, and confirm. The payment will return to a **Ready** status and will not process.



History

Select this tab to review batches that have been processed.

ACH

Active

History

DATE	BATCH	AMOUNT
OCT 28	Payroll	\$4.00 PPD
SEP 12	Payroll	\$1.00 PPD
SEP 9	9/7/24 Reversal	\$1.00 PPD
SEP 9	PNT-B HEND	\$0.00 PPD

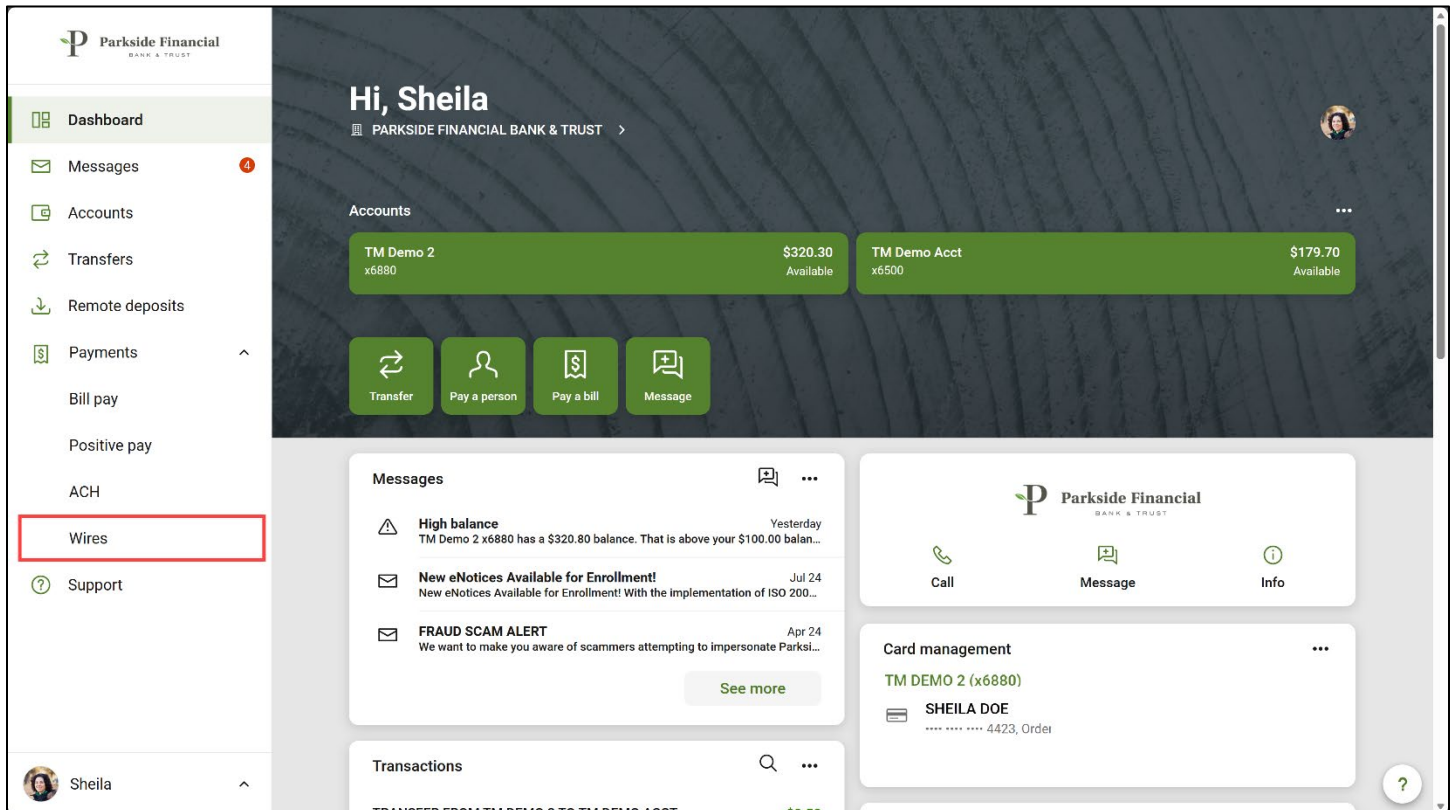
Wires

Create a Wire

Step 1

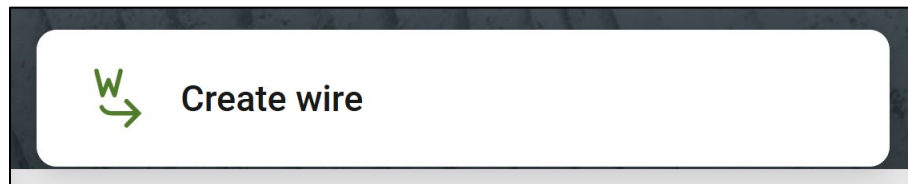
Select **Wires** from the navigation pane.

Please note: if you have multiple payment features activated, select the **Payments** menu first.



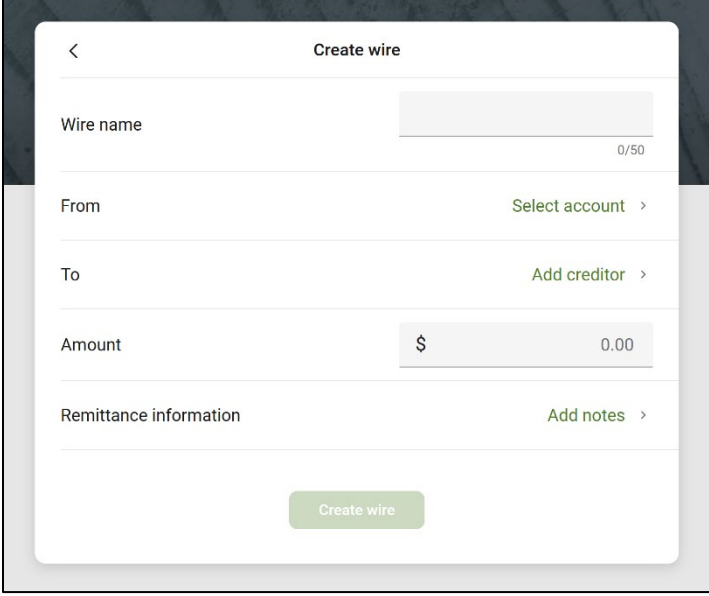
Step 2

Select **Create wire**.



Step 3

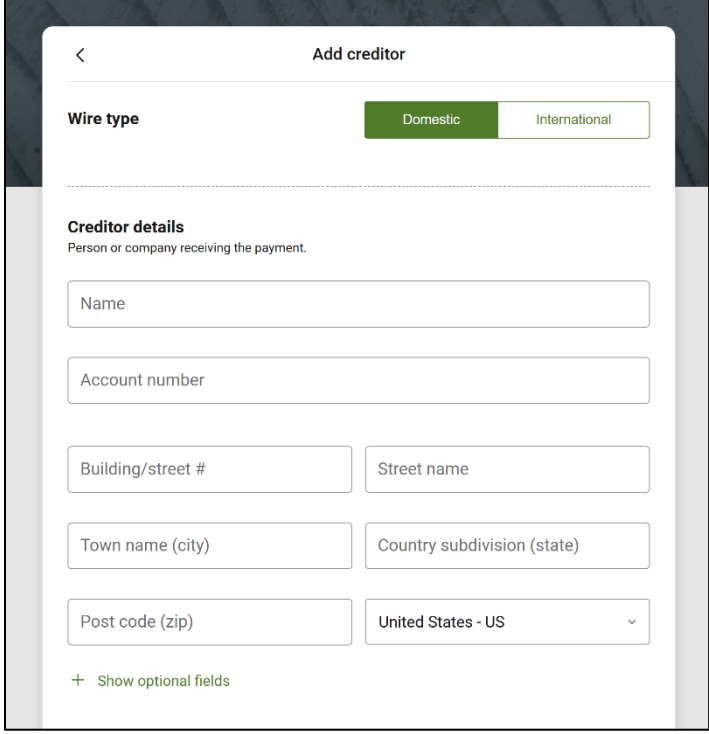
Enter a **Wire name**, choose the account to debit the funds **From**, and click **Add creditor**.



The screenshot shows a mobile app interface for creating a wire transfer. The title is "Create wire". It contains several input fields: "Wire name" with a character count of 0/50, "From" with a "Select account" link, "To" with an "Add creditor" link, "Amount" with a dollar sign and a value of 0.00, and "Remittance information" with an "Add notes" link. A green "Create wire" button is at the bottom.

Step 4

Enter the creditor's name, account number, and address in the Recipient account section



The screenshot shows a mobile app interface for adding a creditor. The title is "Add creditor". It features a "Wire type" section with "Domestic" and "International" buttons. Below is a "Creditor details" section with the instruction "Person or company receiving the payment." and several input fields: "Name", "Account number", "Building/street #" and "Street name", "Town name (city)" and "Country subdivision (state)", and "Post code (zip)" and a dropdown menu for "United States - US". A green "+ Show optional fields" link is at the bottom.

Step 5

Click **Find institution** to lookup the creditor’s financial **Institution name** then click **Save**.

Creditor agent
Beneficiary institution that holds the creditor's account.

Find institution

Routing/ABA number

Institution name

Reference beneficiary

Town name (city)

Country subdivision (state)

United States - US

Instructed agent
Creditor's receiving financial institution.

☒ Same details as Creditor Agent

Cancel

Save

Step 6

Enter the amount of the wire and add any notes that should accompany the wire if applicable.

If you anticipate sending this wire again in the future, click **Save** as template to retain the information under the Templates tab.

Please note: if you wish to send a recurring wire, it must be saved as a template first.

Click **Create wire**.

Create wire

Wire name

Vendor One

10/50

From

TM Demo 2 x6880

\$308.80

To

Vendor One

FIRST CITZ RALEIGH

Amount

\$

1.00

Remittance information

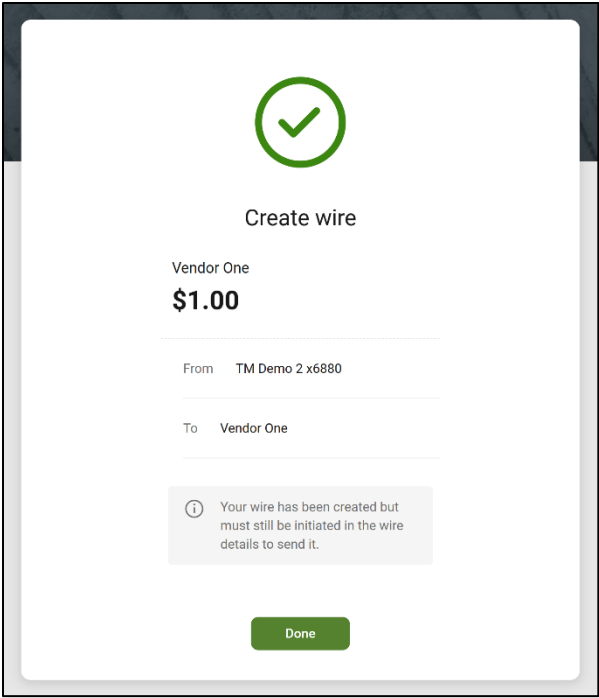
Add notes

Save as template

Create wire

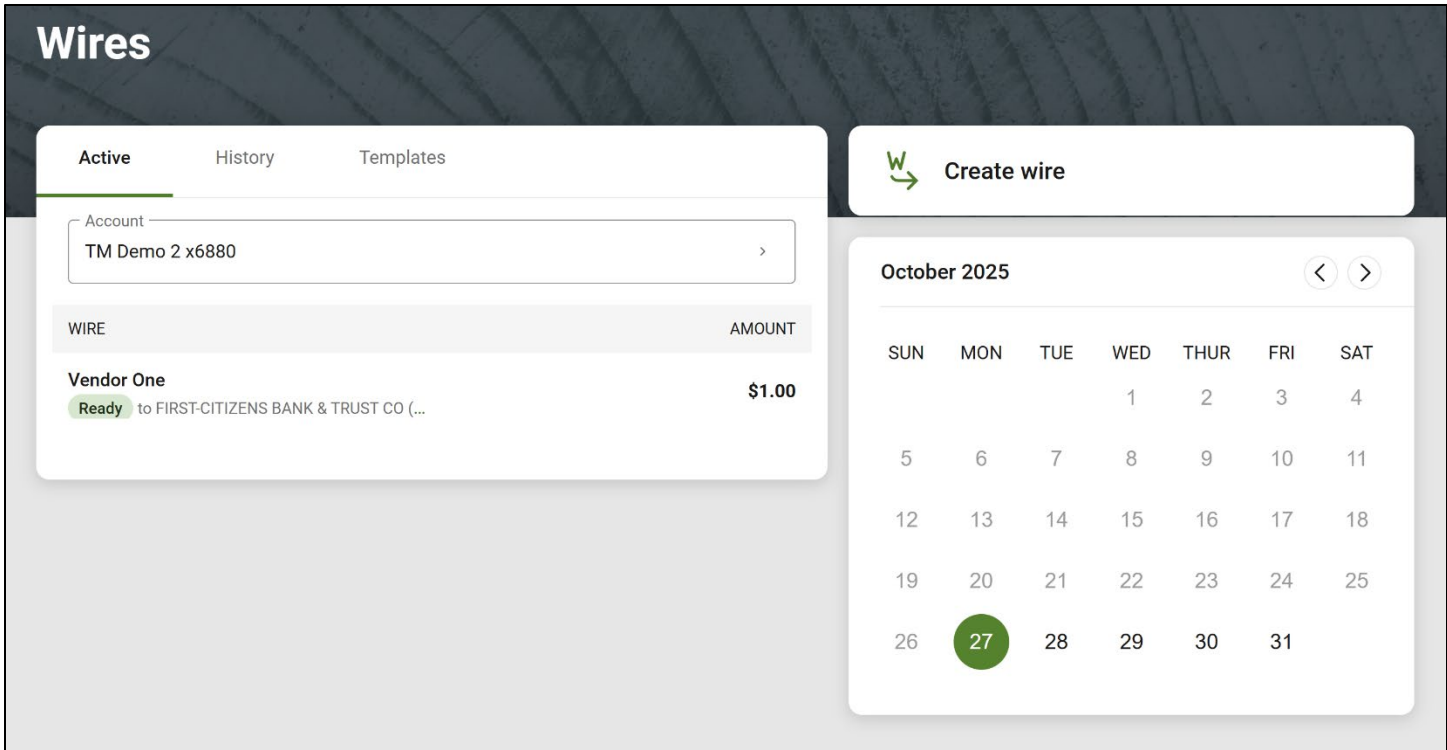
Step 7

Review your confirmation message and click **Done**.



Step 8

Your wire will appear under the **Active** tab in a **Ready** status.
If you saved the wire as a template, it will appear under the Templates tab.



Edit or Delete a Wire

Step 1

Select the wire under the **Active** or **Templates** tab.

Wires

ActiveHistoryTemplates

Account

TM Demo 2 x6880

WIRE

Vendor One

Ready to FIRST-CITIZENS BANK & TRUST CO (...)

AMOUNT

\$1.00

W

Create wire

October 2025

SUNMONTUEWEDTHURFRI

1234

567891011

Step 2

- 1. Click the ellipsis icon to delete the wire
- 2. Click Edit to change the wire name, creditor information, amount, or notes.

Wire details

1

Vendor One

Ready

2

Edit >

\$1.00

From

TM Demo 2

Creditor details

Name

Vendor One

Account number

123123123

Address

123 Main St.
South Lake, TX, US 76262

Show details

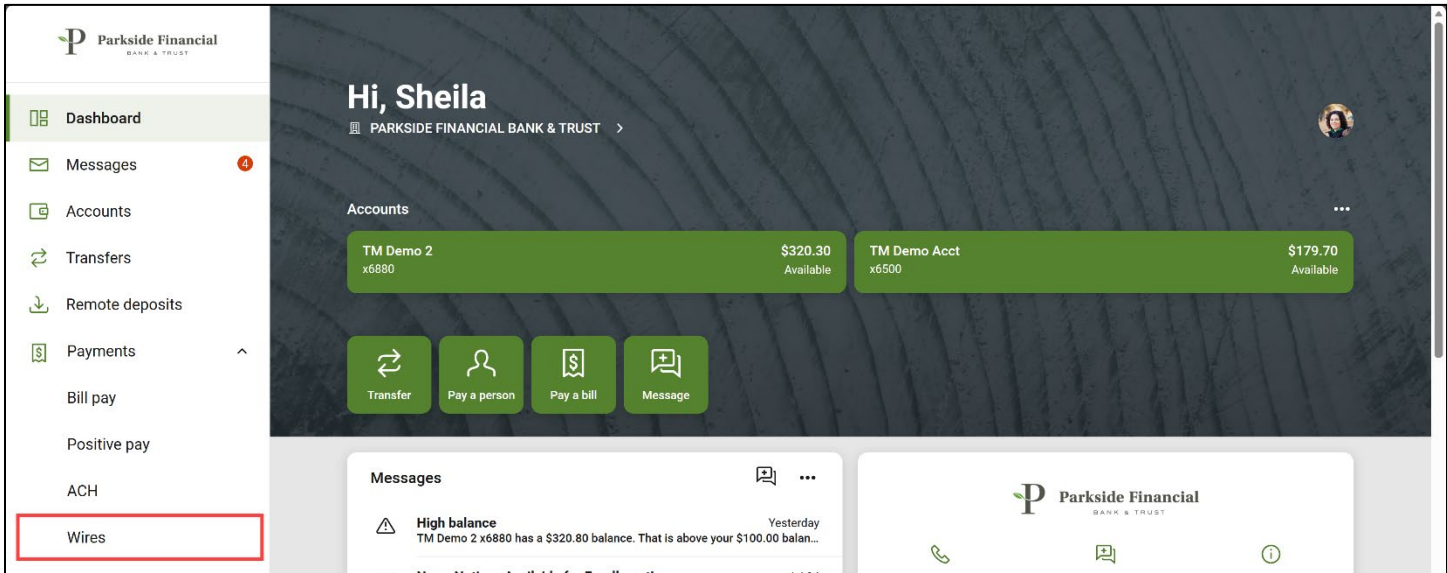
Initiate

Initiate a Wire

Step 1

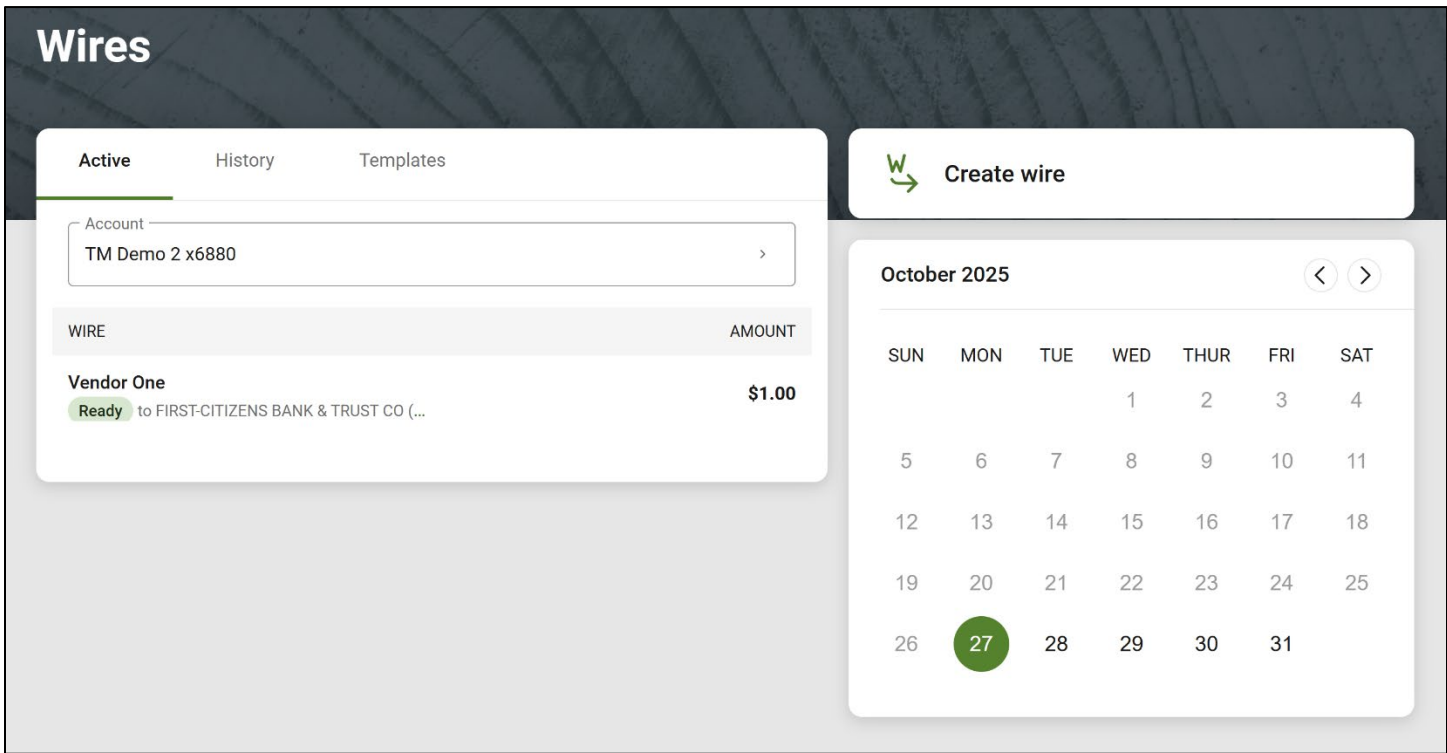
Select **Wires** from the navigation pane.

Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

Select the wire from under the **Active** or **Template** tab.



Step 3

Click **Initiate**.

Wire details

Vendor One

Ready

\$1.00

Edit >

From

TM Demo 2

Creditor details

Name

Vendor One

Account number

123123123

Address

123 Main St.
South Lake, TX, US 76262

Show details

Initiate

Step 4

Review the wire details. If initiating a template, choose a recurring frequency if applicable. Click **Initiate**. You may be prompted to authenticate by entering your password.

Parkside Financial

BANK & TRUST

Dashboard

Messages

Accounts

Remote deposits

Payments

Positive pay

ACH

Wires

Support

Initiate wire

Vendor One

Ready

\$1.00

From TM Demo 2

Parkside Financial

BANK & TRUST

Confirm your credentials to continue

Password

Confirm password

Confirm with a passkey

Sheila

© 2025 Parkside Financial Bank & Trust

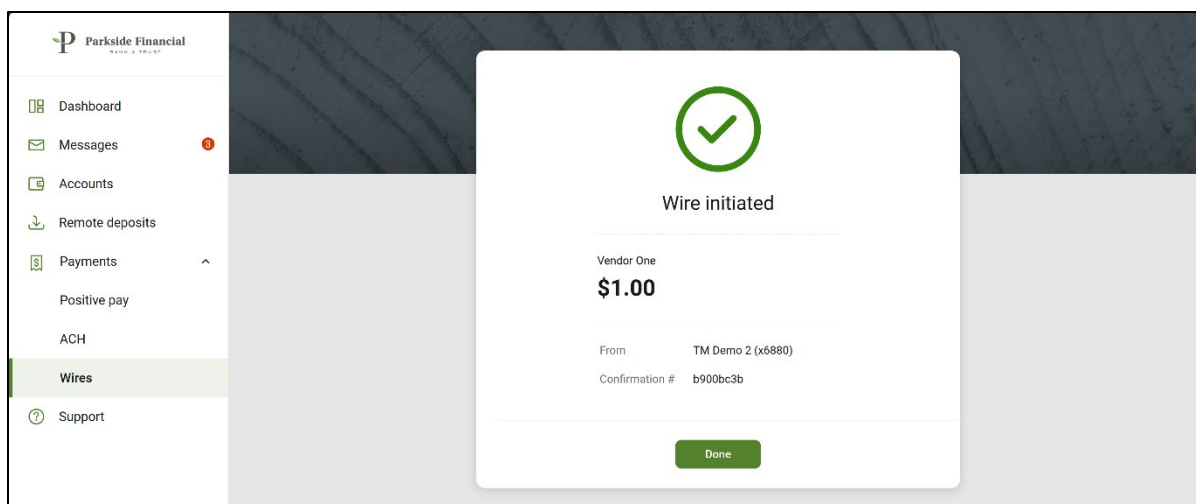
Privacy policy

Member FDIC

Equal Housing Lender

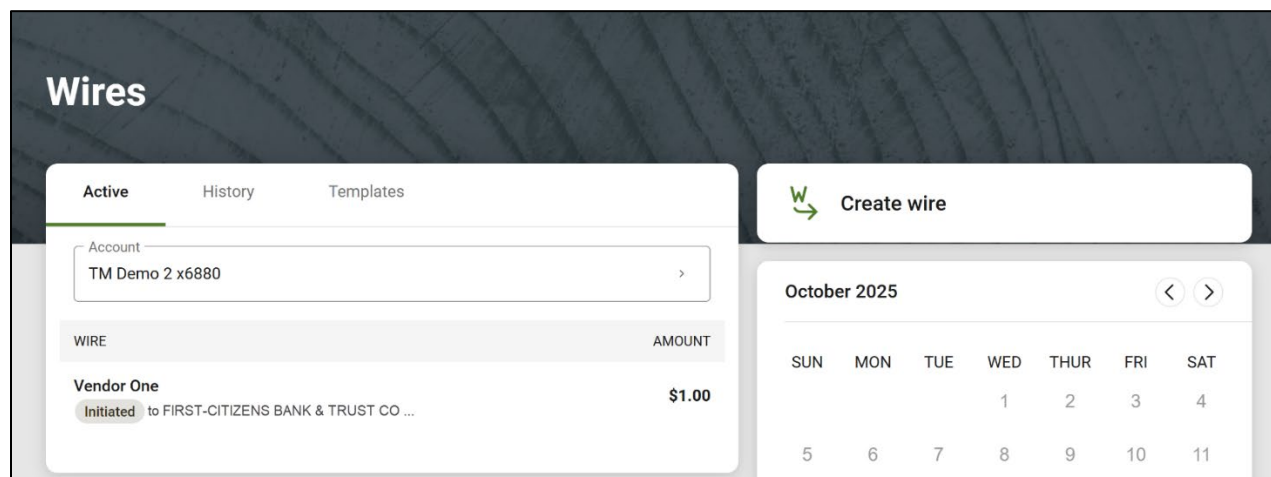
Step 5

Review your confirmation and click **Done**.

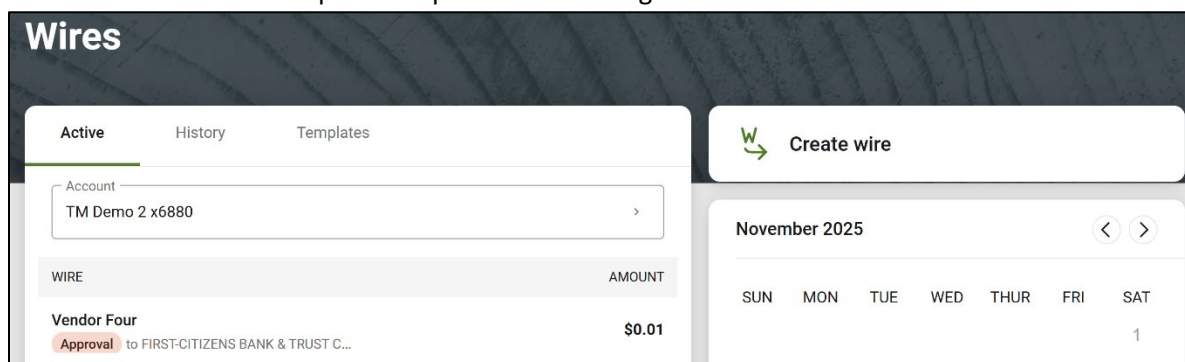


Step 6

Your wire will appear under the **Active** tab in an Initiated status.



Please note: If dual control is activated, the wire will appear in an Approval status at this point. A second user will need to log in and initiate the wire to complete the process and change the status to Initiated.



History

Select this tab to review wires that have been processed.

Wires

Active

History

Templates

Account

TM Demo 2 x6880

>

WIRE	AMOUNT
OCT 28 Vendor One to Vendor One (x3123)	\$1.00

W

→

Create wire

November 2025

<

>

SUN	MON	TUE	WED	THUR	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

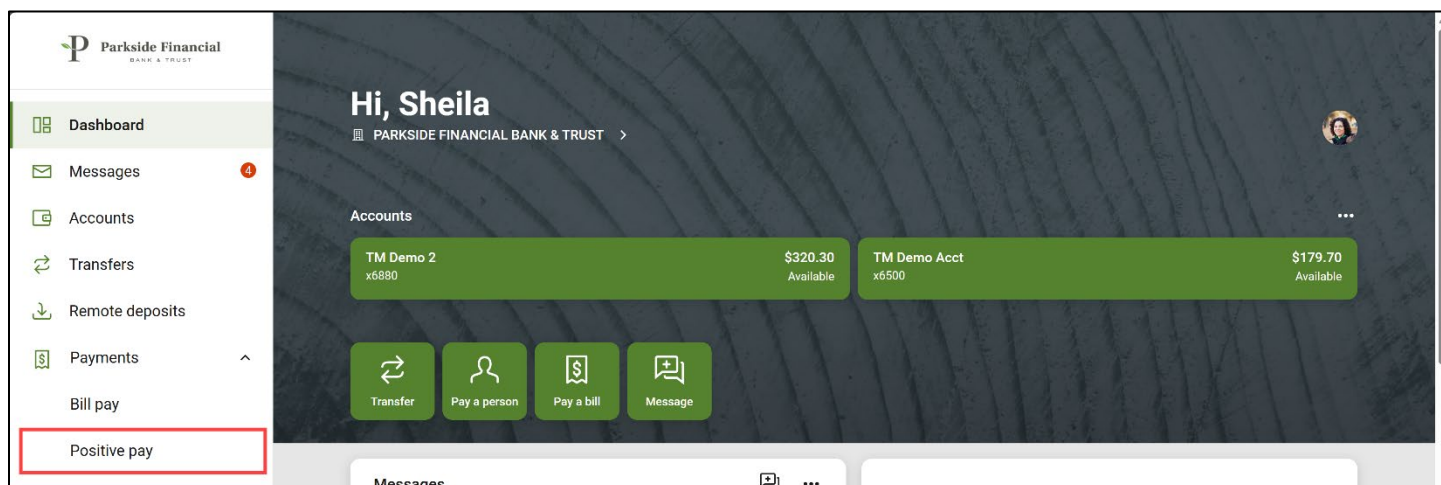
Positive Pay

Enter Issued Items Manually

Step 1

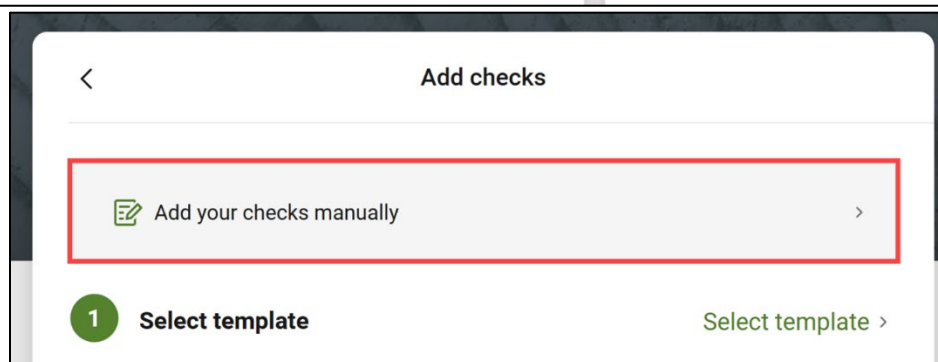
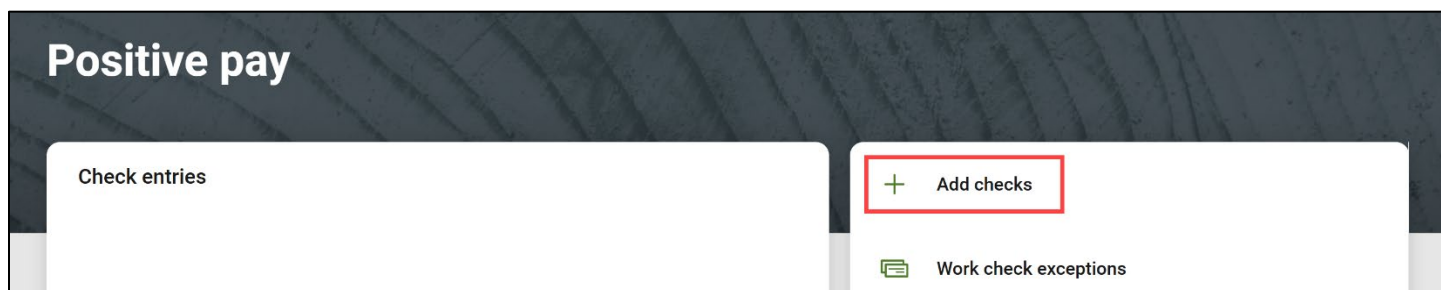
Select **Positive Pay** from the navigation pane.

Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

Click + **Add checks** and select **Add your checks manually**.



Step 3

Select the account the checks were written against.

Positive Pay

Select account

Select the account your checks were issued from

Search accounts

TM Demo 2 (x6880) \$312.80 available	>
TM Demo Acct (x6500) \$187.20 available	>

Step 4

Enter the **Check number**, **Check amount**, **Payee**, **Type**, and **Check date**.
For check **Type**, select **void** to invalidate a previously entered issued item.
Click **Save and enter another** if you have more checks or click **Review** if done.

Positive Pay

Enter checks
TM Demo 2 x6880

Check number: 111 (3/10)

Check amount: \$ 1.00

Payee: Vendor One (10/35)

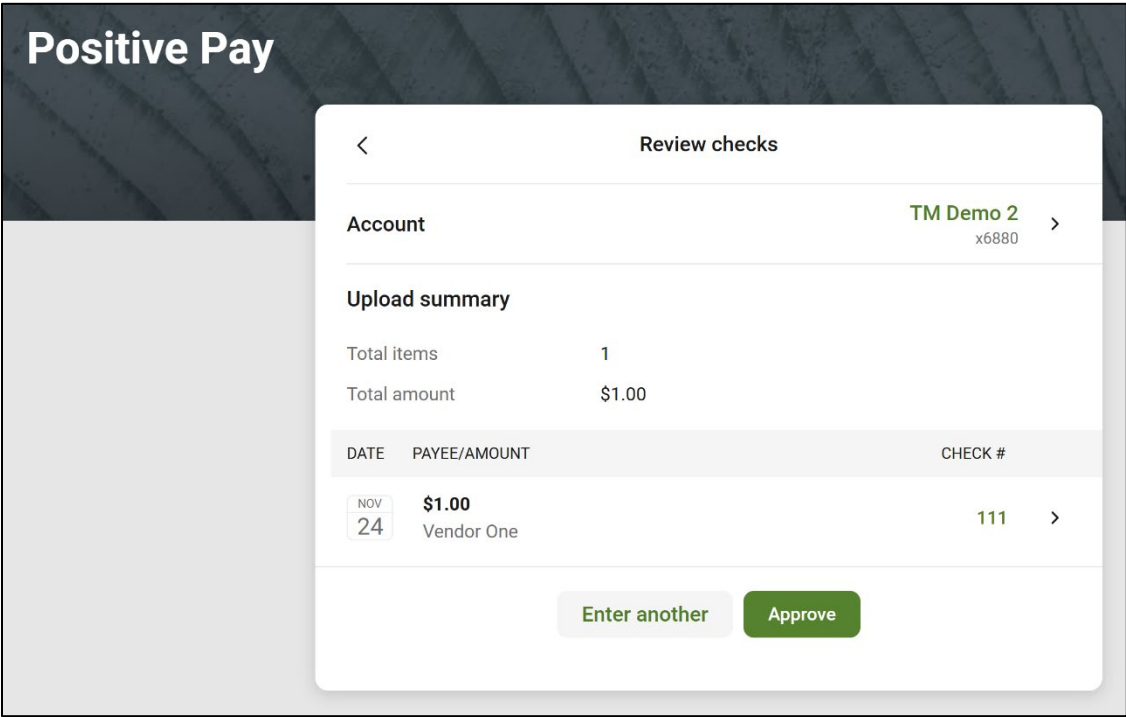
Type: Debit (v)

Check date: November 24, 2025 >

Save and enter another Review 1 check

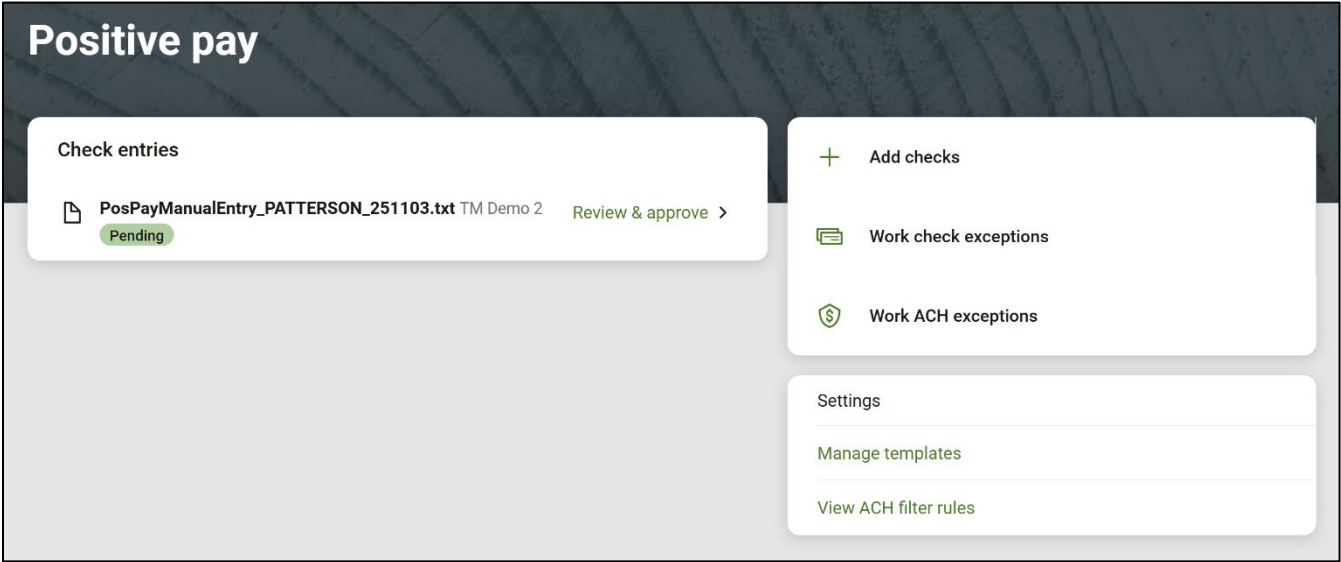
Step 5

Review the details you entered and click **Approve** to continue. Click **Approve** to confirm. Review the confirmation and click **Done**.



Step 6

Your check file will appear on the **Positive Pay** dashboard in a **Pending** Status. Click **Review & approve**.



Step 7

Review the details and click **Approve**.
Review the confirmation and click **Done**.

Review checks

File upload summary

File name

PosPayManualEntry_PATTERSON_251103.txt

Total items

1

Total amount

\$1.00

DATE	PAYEE/AMOUNT	CHECK #
NOV 24	\$1.00 Vendor One	00000000111

Cancel

Approve

If any modifications are needed, cancel this upload and resubmit with corrected issued item(s).

Step 8

The issued items file status will now show as **Successful**.

Positive pay

Check entries

 PosPayManualEntry_PATTERSON_251103.txt TM Demo 2

15 mins ago

Successful

+

Add checks

 Work check exceptions

 Work ACH exceptions

Settings

Manage templates

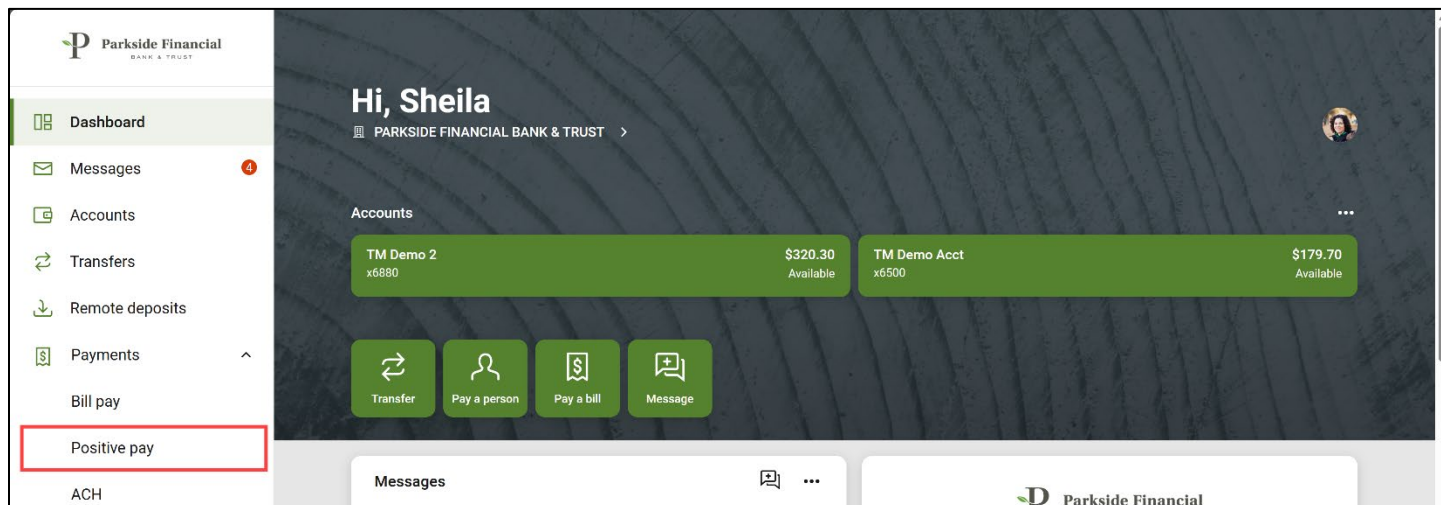
View ACH filter rules

Create an Issued Items Upload Format

Step 1

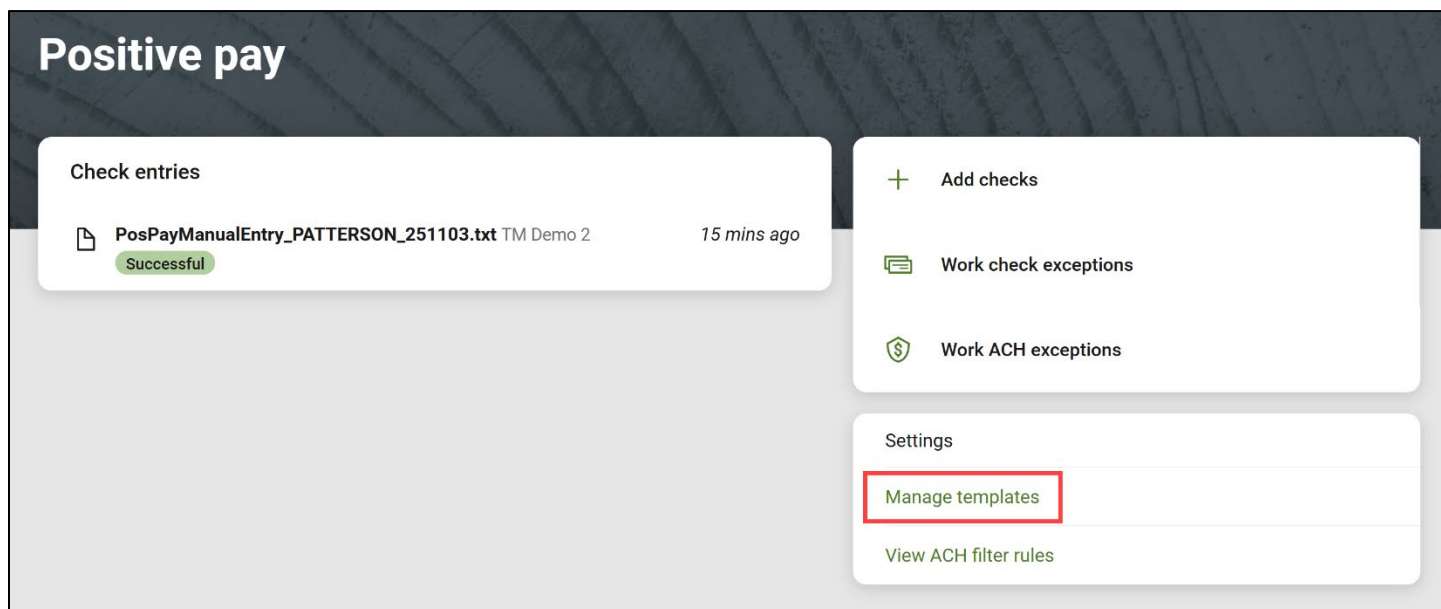
Select **Positive Pay** from the navigation pane.

Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

Click **Manage templates** and click the + sign.



Step 3

Select the format of your file.

Delimited:

- 1. Enter a name for this upload format.
- 2. Choose your amount format, field delimiter and text qualifier.
- 3. Enter the column number from your file into the corresponding field. Leave any columns you’re not using blank.

Please note: Some fields may require additional configuration. Click the arrow to adjust those fields.

Click **Review** and then **Save**. Click **Done**.

<

Create delimited template

Template name

Template name

0/50

Amount format ⓘ

No format validation >

Field delimiter ⓘ

Comma (,) >

Text qualifier ⓘ

None >

Column order

Enter which column each label appears in your file. Leave any columns you’re not using blank.

LABEL	COLUMN NUMBER	CONFIGURATION(S)
Item Number Required	Col #	
Item Amount Required	Col #	
Account number	Col #	
Account type	Col #	Set indicators > Required

Fixed Position:

- 1. Enter a name for this upload format.
- 2. Choose your amount format.
- 3. Enter where each label starts and ends in your file. For example, if the item number is the first six characters in your file, the beginning number would be 1 and the end would be 6.

Click **Review** and then **Save**. Click **Done**.

<

Create fixed position template

Template name

Template name0/50

Amount format ⓘNo format validation >

Label position

Enter where the label position begins and ends in your file. Leave columns you're not using blank.

LABEL	BEGIN	END	CONFIGURATION(S)
Item Number Required	Begin	End	
Item Amount Required	Begin	End	
Account number	Begin	End	
Account type	Begin	End	Set indicators Required >
Issue date	Begin	End	Set date format Required >
Payee Max 35 characters	Begin	End	

Your upload template will be listed under the **Manage Templates** page and can be edited or deleted at any time.

Click the + to add more template if necessary.

<

Manage templates

+

Default Delimited
Delimited>

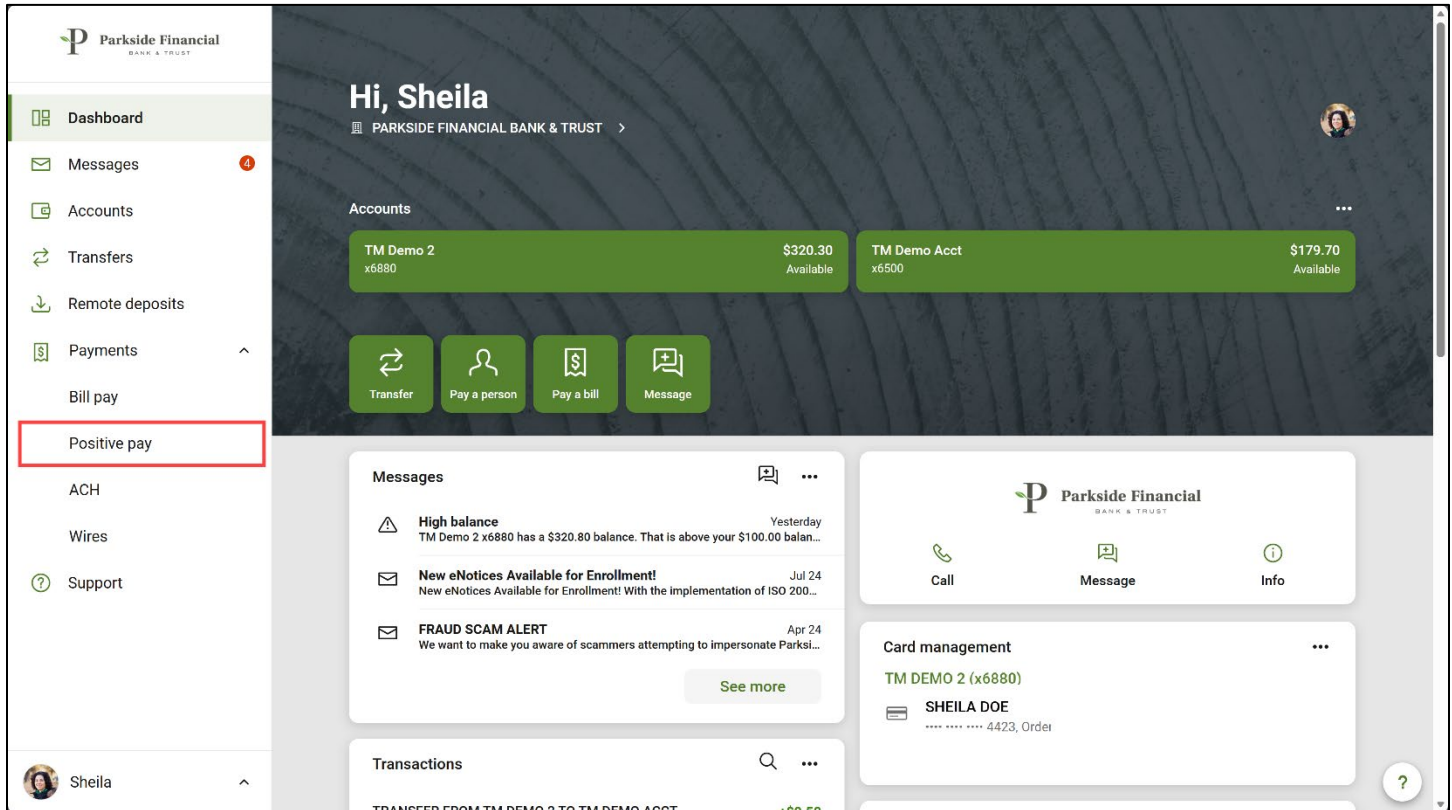
Default Fixed>

Upload an Issued Items File

Step 1

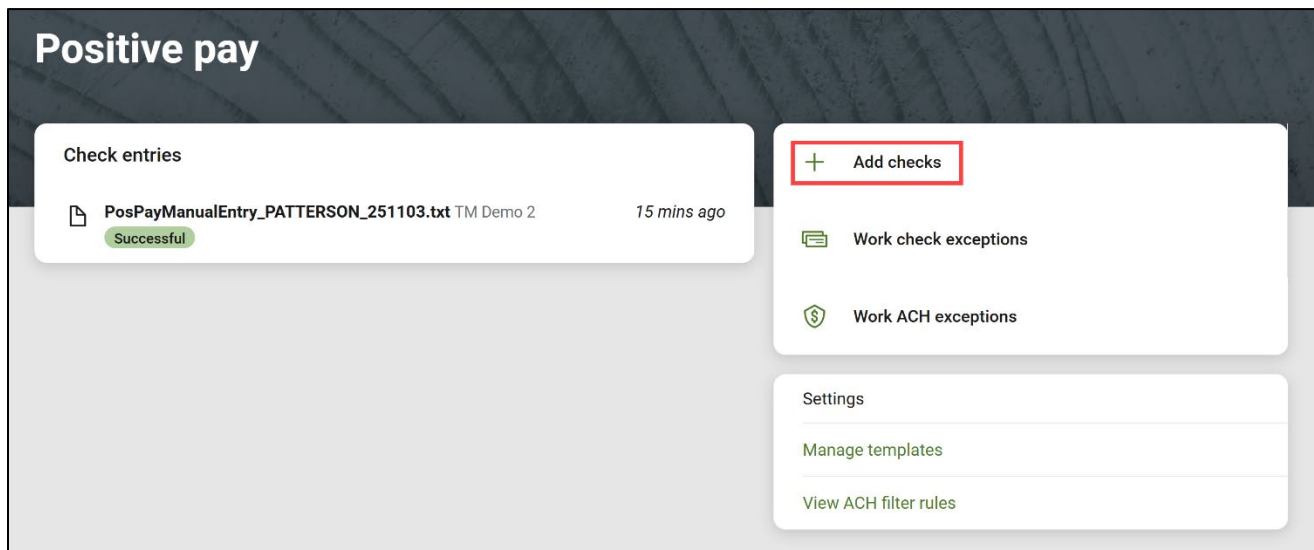
Select **Positive Pay** from the navigation pane.

Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

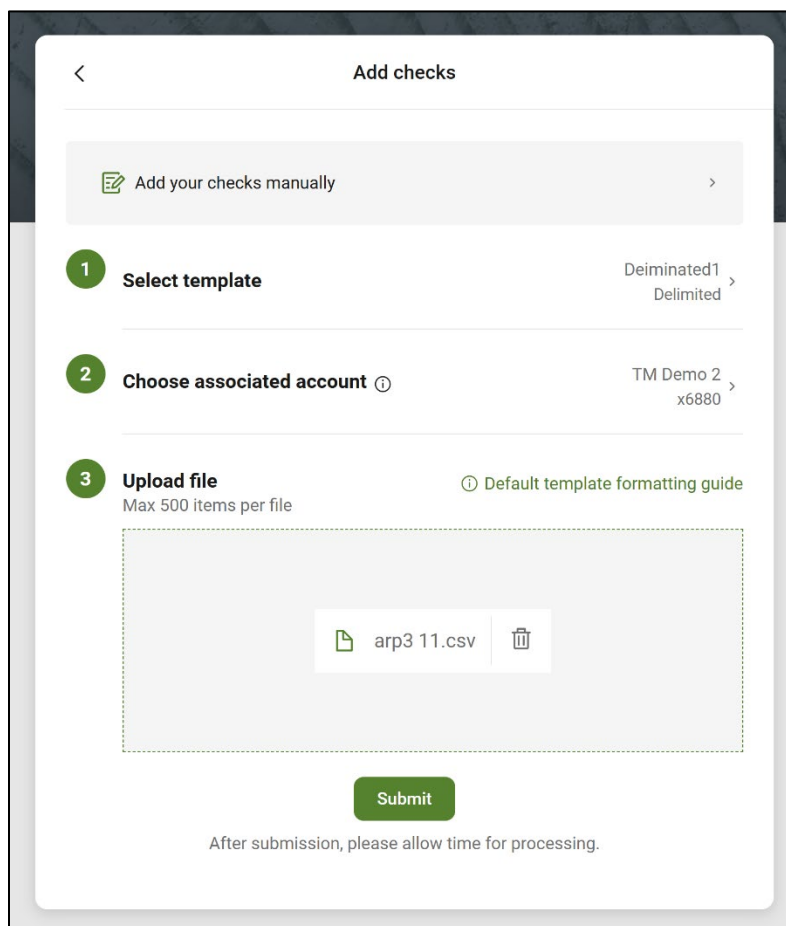
Click **+ Add checks**.



Step 3

Choose your upload format template.

1. Select the account the checks were written against.
2. Browse for your issued items file.
3. Click **Submit**.



Add checks

 Add your checks manually >

1 Select template Deiminated1 Delimited >

2 Choose associated account  TM Demo 2 x6880 >

3 Upload file  Default template formatting guide
Max 500 items per file

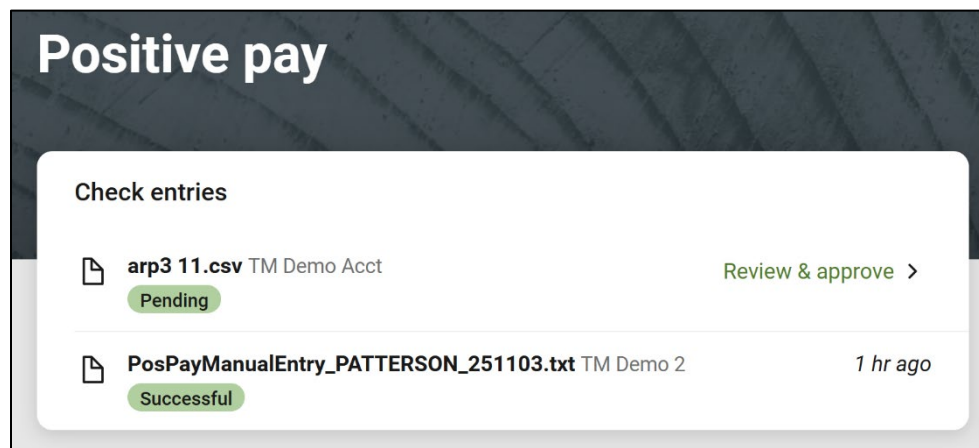
 arp3 11.csv 

Submit

After submission, please allow time for processing.

Step 4

Your uploaded file will appear on the Positive Pay dashboard in a **Pending** status. Click **Review & approve**.



Positive pay

Check entries

 **arp3 11.csv** TM Demo Acct **Pending** **Review & approve** >

 **PosPayManualEntry_PATTERSON_251103.txt** TM Demo 2 **Successful** 1 hr ago

Step 5

Review the details and click **Approve**.
Review the confirmation and click **Done**.

Review checks

File upload summary

File name

arp3 11.csv

Total items

3

Total amount

\$142.72

DATE	PAYEE/AMOUNT	CHECK #
SEP 27	\$25.37 Vendor 1	00000000552
SEP 28	\$30.33 Vendor 2	00000000553
SEP 29	\$87.02 Vendor 3	00000000554

Cancel

Approve

If any modifications are needed, cancel this upload and resubmit with corrected issued item(s).

Step 6

The issued items file status will now show **Successful**.

Positive pay

Check entries

 arp3 11.csv TM Demo Acct

Successful

5 mins ago

 PosPayManualEntry_PATTERSON_251103.txt TM Demo 2

Successful

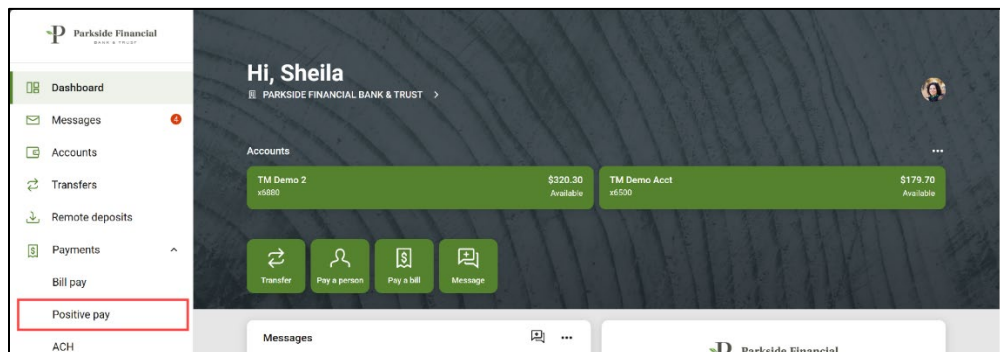
1 hr ago

Work Check Exception Items

Step 1

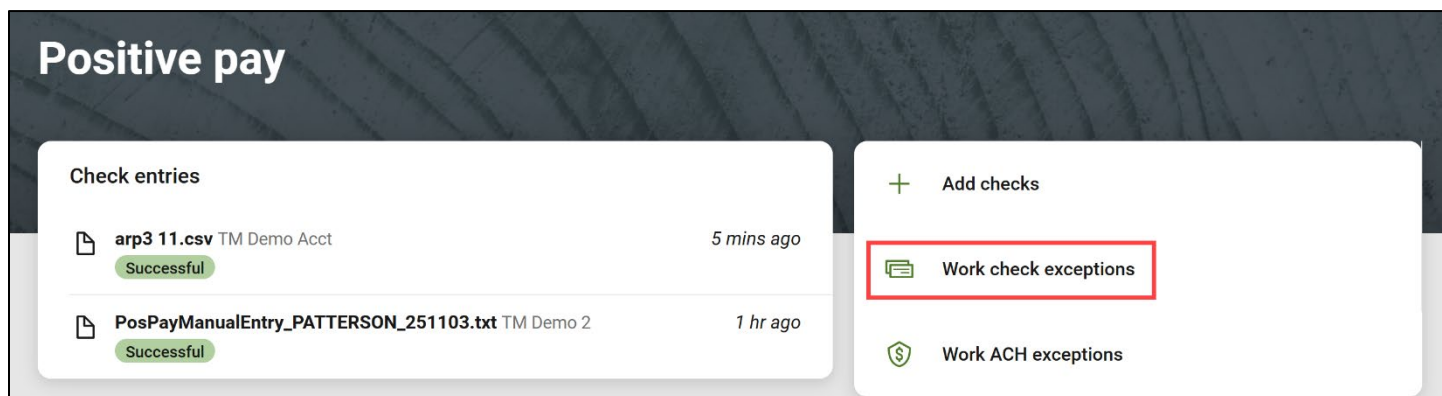
Select **Positive Pay** from the navigation pane.

Please note: If you have multiple payment features activated, select the **Payments** menu first.



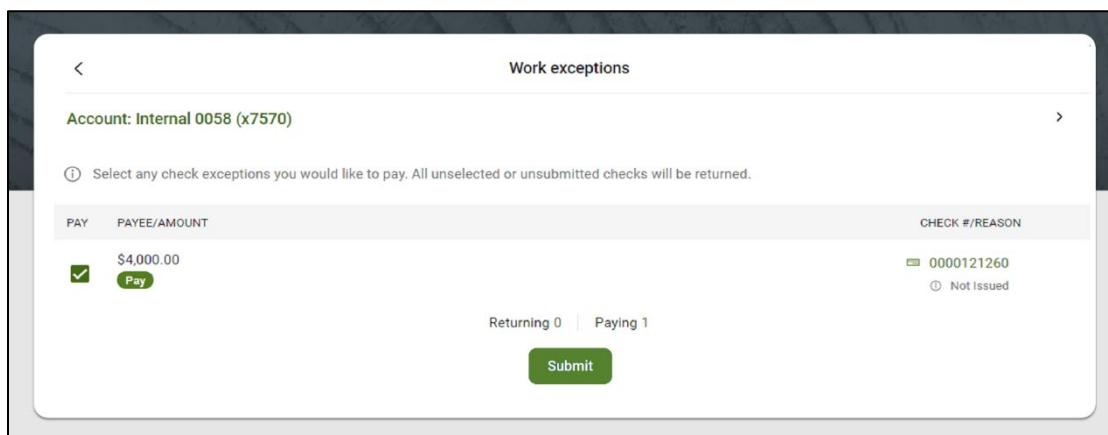
Step 2

Click **Work check exceptions**.



Step 3

Review your exception(s). Click the check number to see additional details. Check the box to Pay the item or leave the box unchecked to return. Click Submit when done.

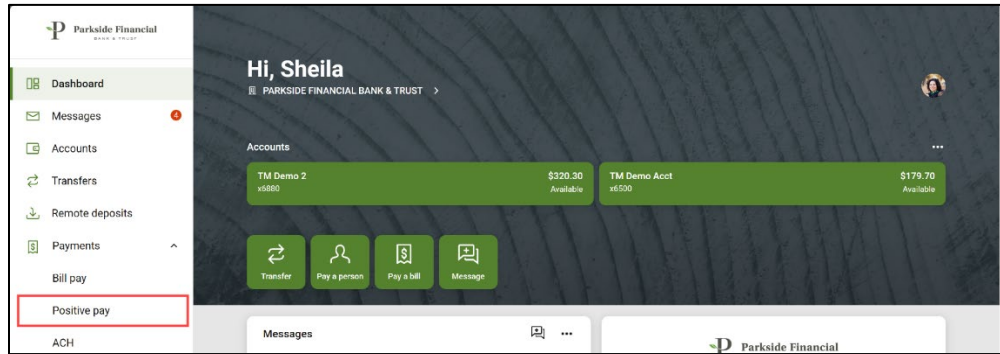


Work ACH Exception Items

Step 1

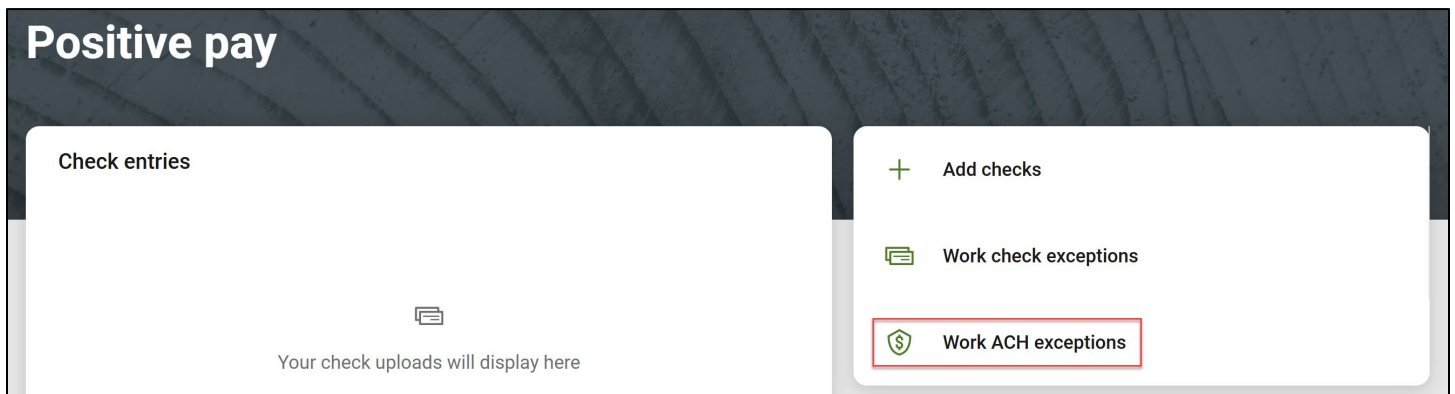
Select **Positive Pay** from the navigation pane.

Please note: If you have multiple payment features activated, select the **Payments** menu first.



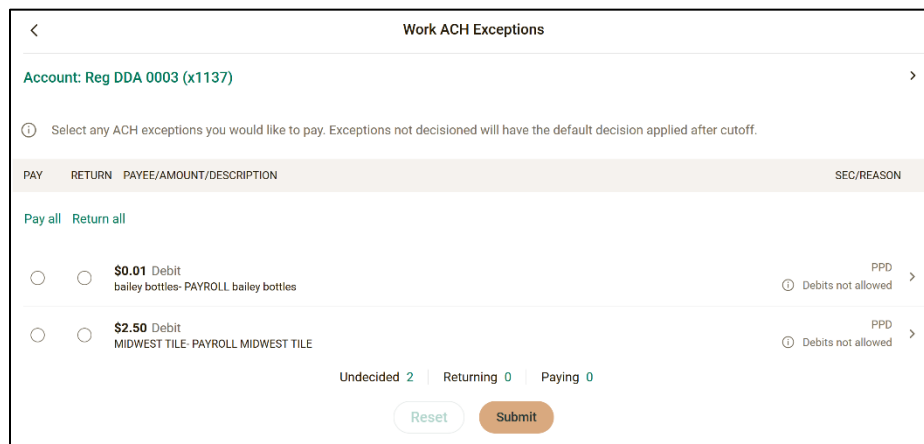
Step 2

Click **Work ACH exceptions**.



Step 3

Review your exception(s). Click the arrow on the right to see additional details. Check the box to Pay or Return the item. Click Submit when done.

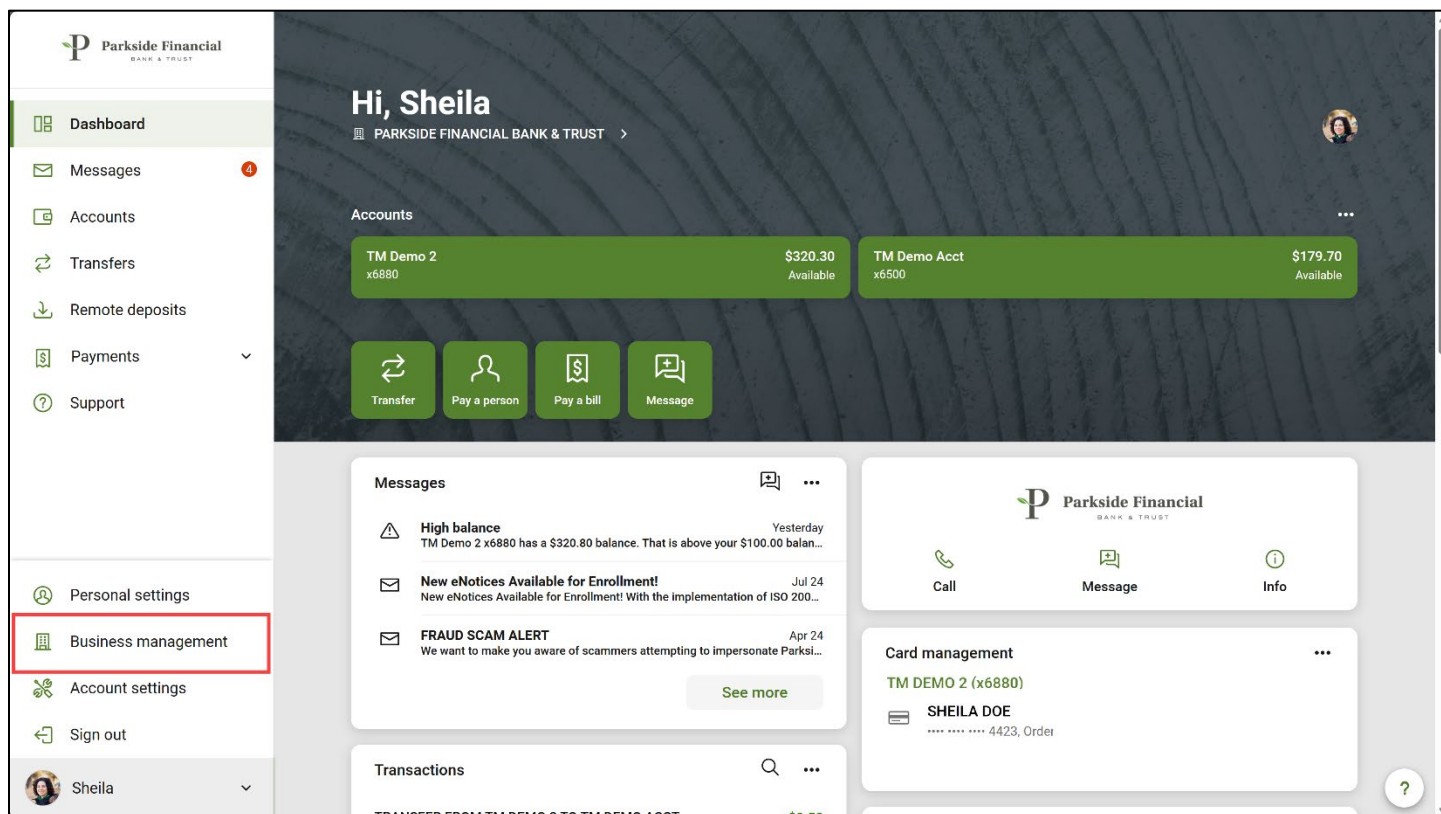


Administration

Create a New User

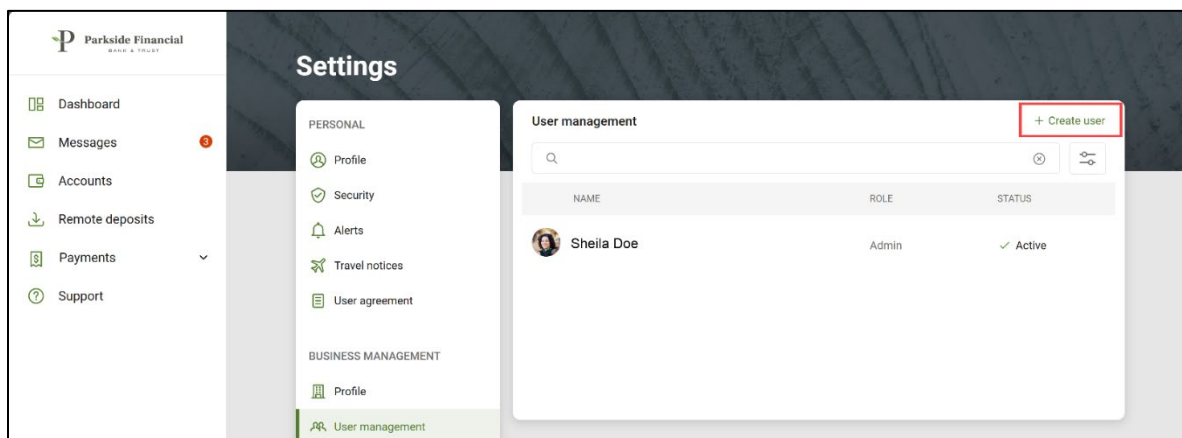
Step 1

Click your profile and select **Business management**.



Step 2

Click **+ Create user**.



Step 3

Enter the user's **First name**, **Last name**, **Email address**, and choose their **User role**.

- **User:** can have customized permissions and account access but cannot manage other users.
- **Viewer:** View only access on specified accounts.
- **Admin:** can have customized permissions and account access as well as user management.

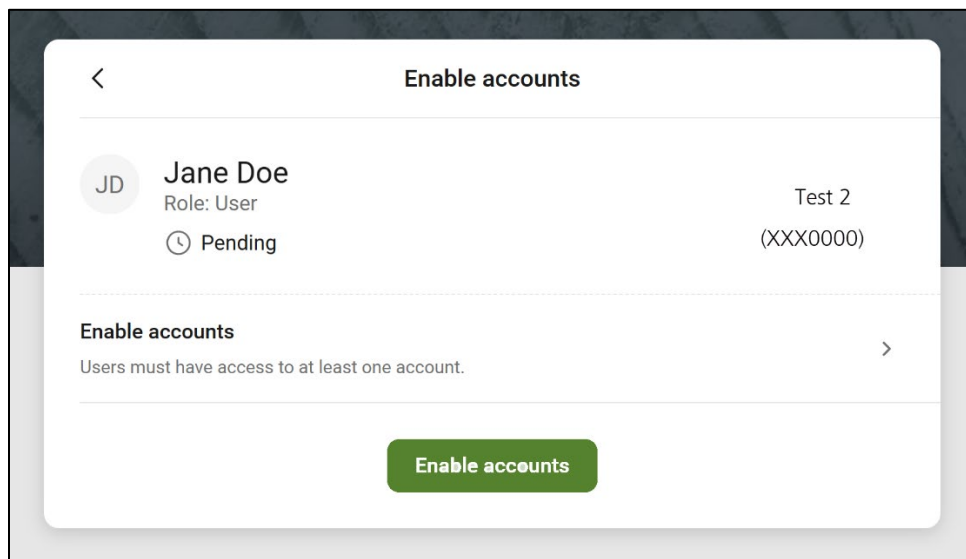
Click **Create user**.

Please note: You may be asked to authenticate with your password

The screenshot displays the Parkside Financial digital banking interface. On the left is a sidebar menu with options: Dashboard, Messages (with a red notification badge), Accounts, Remote deposits, Payments, and Support. The main area shows a 'Create user' modal form. The form fields are: First name (Jane), Last name (Doe), Email (janedoe@testco.com), and User role (a dropdown menu with 'User' selected, and 'Viewer' and 'Admin' as options). A green 'Create user' button is at the bottom of the modal. The footer of the interface includes the user's name 'Sheila', copyright information '© 2025 Parkside Financial Bank & Trust', links for 'Privacy policy', 'Member FDIC', and 'Equal Housing Lender', and a help icon.

Step 4

Click the **Enable accounts** arrow and choose the account(s) the user should have access to. Click **Enable accounts** to continue.

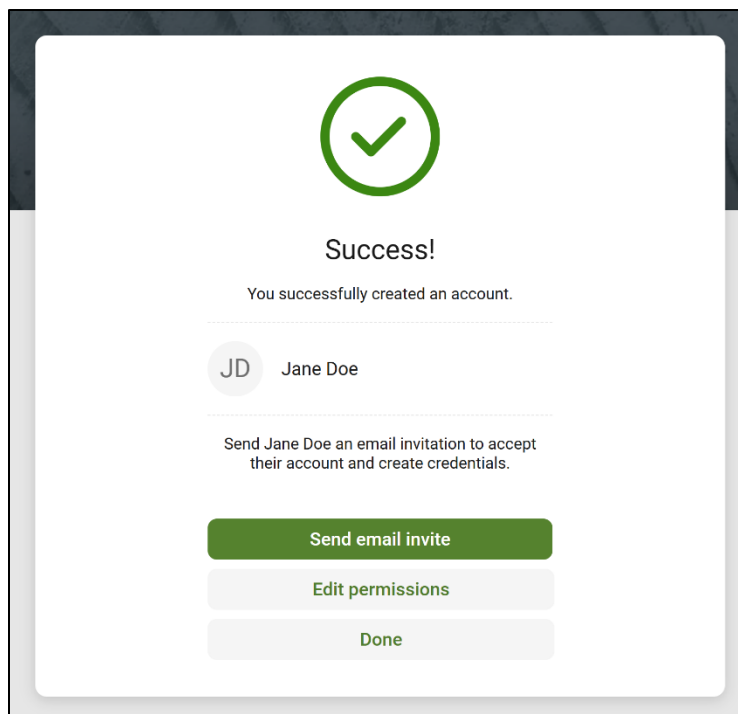


The screenshot shows a mobile app interface titled "Enable accounts". At the top left is a back arrow. Below it, the user's profile is displayed: a circular avatar with "JD", the name "Jane Doe", "Role: User", and a "Pending" status with a clock icon. To the right, "Test 2 (XXX0000)" is shown. A dashed line separates the profile from the "Enable accounts" section, which contains the instruction "Users must have access to at least one account." and a right-pointing arrow. At the bottom is a green button labeled "Enable accounts".

Step 5

Review your confirmation and choose from the following options:

1. Click **Send email invite** to send the user a link to set up their login credentials without modifying permissions further.
Please note: Permissions and account access can be modified in the user's profile at a later time if necessary.
2. Select **Edit permissions** to modify entitlements and account access prior to sending the email invite.
3. Click **Done** to send the invite and edit permissions at a later time.



The screenshot shows a confirmation screen with a large green checkmark icon at the top. Below it is the text "Success!" and "You successfully created an account." A dashed line separates this from the user's profile, which shows "JD Jane Doe". Below the profile is the instruction "Send Jane Doe an email invitation to accept their account and create credentials." At the bottom are three buttons: "Send email invite" (green), "Edit permissions" (light gray), and "Done" (light gray).

Step 6

If **Edit permissions** was selected:

1. Click **set permissions** to modify global entitlements for the user.
2. **Toggle** on an account to give the user access.
3. Select an account to adjust the global permissions at the account level is necessary.
4. Select **Invite** to send the user an email to set up their login credentials.
5. Click the arrow to return to the Business Management page.

Please see the **Editing or Deleting a User** section in this document for more information on permissions

User management Jane Doe

Jane Doe's account is pending. Invite them to complete set-up of their account. **4 Invite**

Set permissions 1

Search accounts

ACCOUNT	ACCESS
MONEY MARKET XXX0871	2 ☒ > 3
MONEY MARKET XXX0871	☐ >
MONEY MARKET XXX0871	☐ >

Additional services

Manage Jane Doe's ability to view the additional services enabled by PARKSIDE FINANCIAL BANK & TRUST.

Accept online payments ☐

Step 7

The new user will appear as **Pending** on the Business Management page. Their status will change to **Active** once they set up their credentials.

Please note: You can modify permissions, account access, or manage the invite at any time by clicking the user's name.

Settings

PERSONAL

- Profile
- Security
- Alerts
- Travel notices
- User agreement

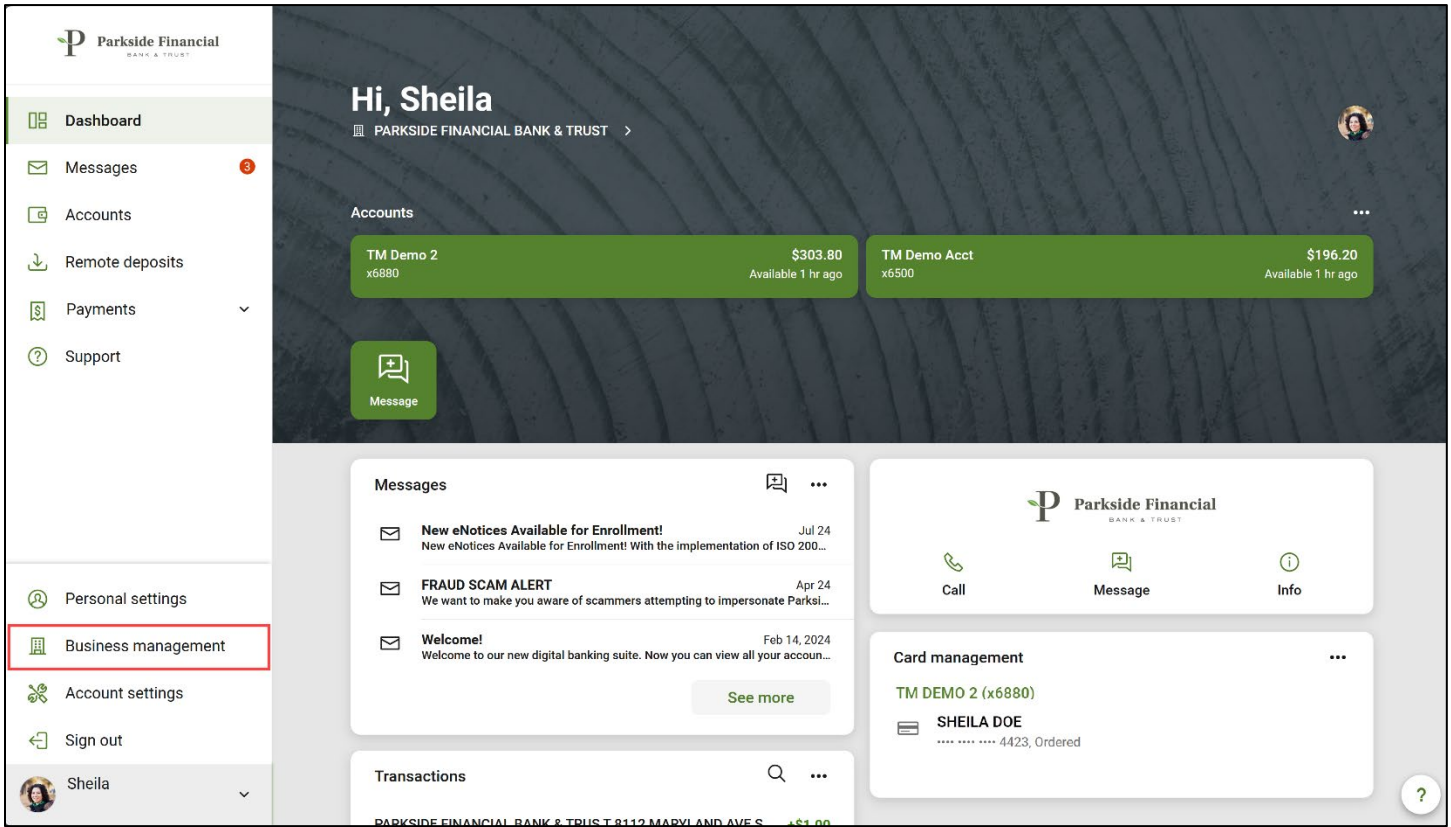
User management [+ Create user](#)

NAME	ROLE	STATUS
Jane Doe	User	✓ Active

Editing or Deleting a User

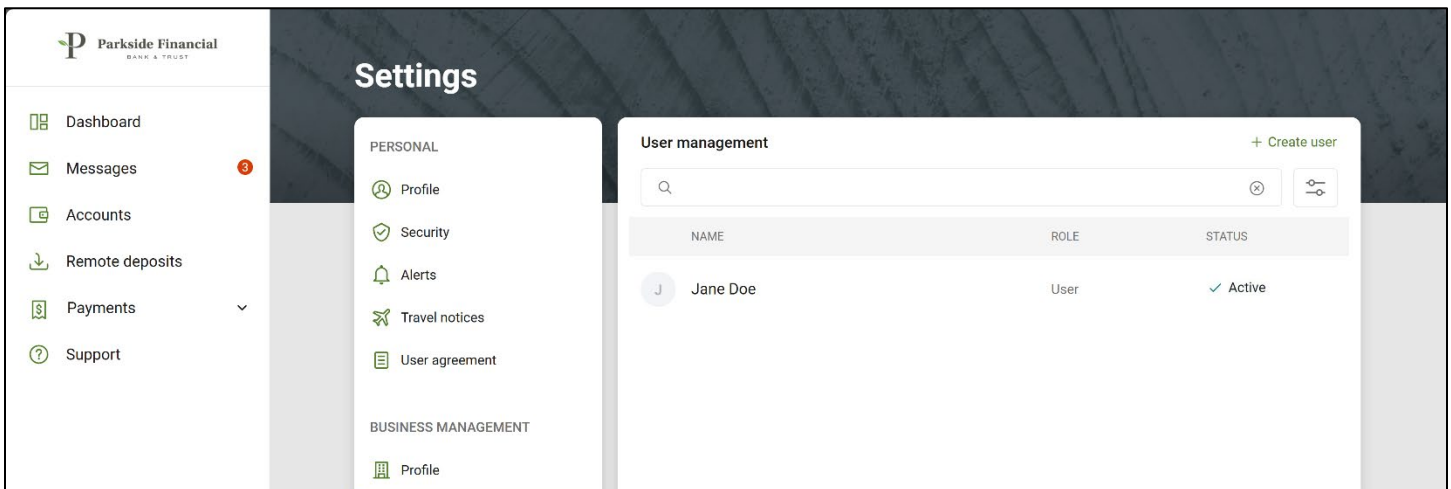
Step 1

Click your profile and select **Business management**.



Step 2

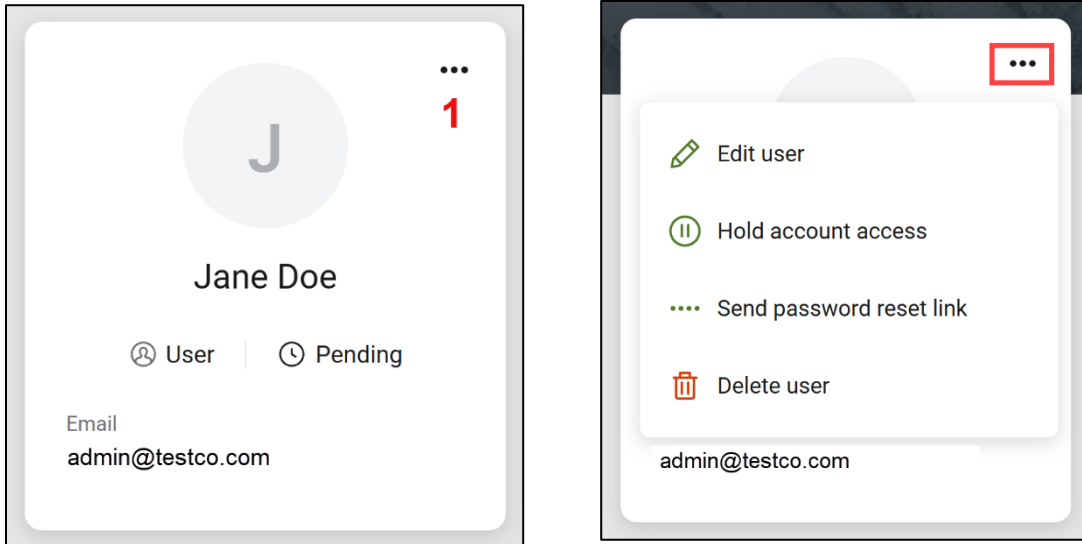
Select the user you'd like to edit.



NAME	ROLE	STATUS
Jane Doe	User	Active

Step 3

1. Select the **ellipsis** icon.
 - a. Click **Edit user** to change the users name, role, or email address.
 - b. Select **Hold account access** to temporarily prevent them from logging in.
 - c. Click **Send password reset** link to email them a link.
 - d. Select **Delete user** to remove their access permanently.



2. Click **Set permissions** to modify global entitlements.
Please note: Options may vary depending on your company's setup.

Permissions

Set Jane Doe's user permissions and adjust account level permissions as needed.

[Set permissions](#)

- a. ACH
 - i. **Enable:** Activates this feature for the user.
 - ii. **View ACH:** Must be enabled to edit any other ACH permission.
 - iii. **Daily ACH limit:** Maximum amount the user can initiate per day.
 - iv. **Initiate ACH:** Allows user to transmit ACH payments to the bank.
 - v. **Initiate same day ACH:** Allows user to transmit same day ACH payments to the bank.
 - vi. **Full ACH Control:** Allows a user to initiate an ACH payment that they have created. If this is not activated, the user cannot initiate a payment they created. A second user must initiate it.
 - vii. Edit/Delete ACH Control:
 1. **Full edit/create:** Allows the user to edit everything within a payment.
 2. **Partial Edit:** User can only change the dollar amount of a transaction, debit or credit indicator, add a prenote, or hold the transaction.

3. **None:** User cannot Edit an ACH payment.
- viii. **Recurring ACH:** Allows the user to set a recurring frequency for a payment.
- ix. **Upload ACH file:** Allows the user to upload a NACHA formatted file.
- x. **Restricted batch access:** User can view payments that have been flagged as restricted.
- xi. **Import recipients:** User can import a file containing recipient data to create a payment.
- xii. **Batch delete:** User can delete an ACH payment.

- b. Bill Pay
 - i. **Enable:** Activates this feature for the user.
- c. Card Management
 - i. **Enable:** Activates this feature for the user.
- d. Positive Pay
 - i. **Enable:** Activates this feature for the user.
 - ii. **Upload Positive Pay:** Allows user to upload an issued items check file to the bank.
 - iii. **Work Positive Pay:** Allows user to pay or return issued item check exceptions.
 - iv. **Download Positive Pay:** Not applicable.
 - v. **Work ACH Exceptions:** User can pay or return ACH exceptions items.
- e. Stop Payments
 - i. **Enable:** Activates this feature for the user.
 - ii. **View Stop Payment:** User can only see existing stop payments.

- iii. **Add stop payment:** User can create a stop payment.

f. Transfers

- i. **Enable:** Activates this feature for a user.
- ii. **Transfer limit:** Maximum amount a user can transfer per day.

- g. **User Management:** Allows user to create, modify, and delete other users.

h. Wires

- i. **Enable:** Activate this feature for a user.
- ii. **Work with wires:** Must be enabled to activate any other wire permissions
- iii. **Create wire templates:** Allows user to create a wire that can be reused.
- iv. **Edit wire templates:** Allows user to modify existing wire templates.
- v. **Create one-time wires:** Allows user to create a single, one-time use wire.
- vi. **Edit one-time wires:** Allows user to modify single, one-time user wires.
- vii. **Edit recurring wires:** Allows user to modify a recurring wire.
- viii. **Daily wire limit:** Amount a user can transmit per day.
- ix. **Per wire limit:** Amount a user can create a wire for.
- x. **Dual wire control limit:** Amount that user can initiate if dual control is activated.

- xi. **Transmit wires:** Allows user to initiate wires for processing.
- xii. **Transmit recurring wires:** Allows user to initiate wires with a recurring frequency.
- xiii. **Dual wire control:** If activated, a user is required to have a second user approve a wire they initiated before it is sent for processing.
- xiv. **Transmit future-dated wires:** Allows a user to set a future date when initiating a wire.

Click the **back arrow** once done.

- 3. Toggle on the switch to activate an account for a user.
- 4. Select an account to modify the global permissions on a per account basis.

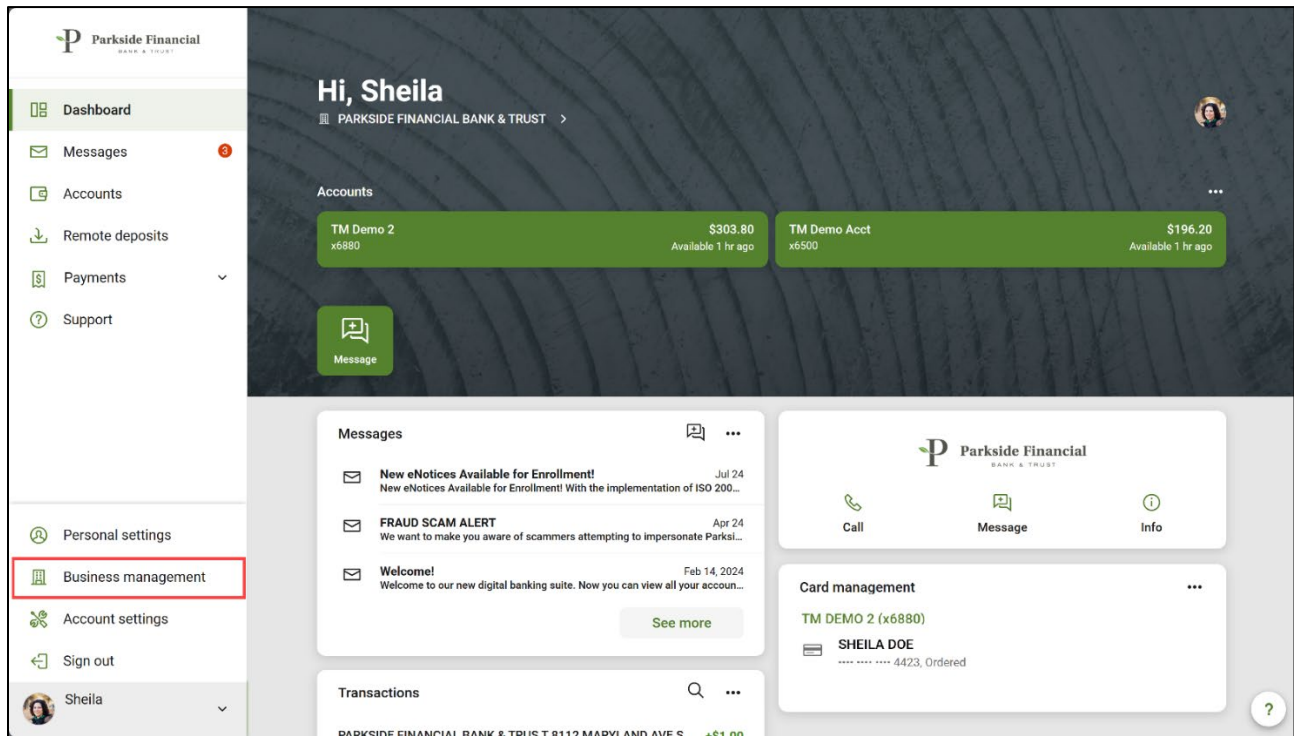
ACCOUNT	ACCESS
MONEY MARKET XXX0871	3 ☒ > 4
MONEY MARKET XXX0871	☐ >
MONEY MARKET XXX0871	☐ >
See more	

- 5. For users who have not yet logged in, click **Invite** to send them the enrollment email. They will receive an email with a link to establish their credentials.
- 6. Click the **back arrow** to return to the Business Management page.

Unlock a Locked User

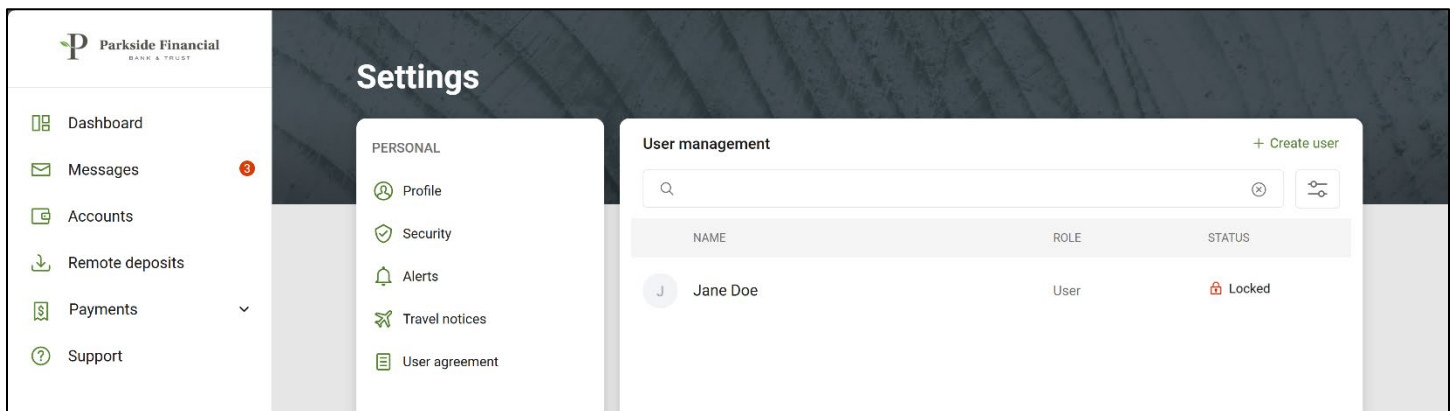
Step 1

Click your profile and select **Business management**.



Step 2

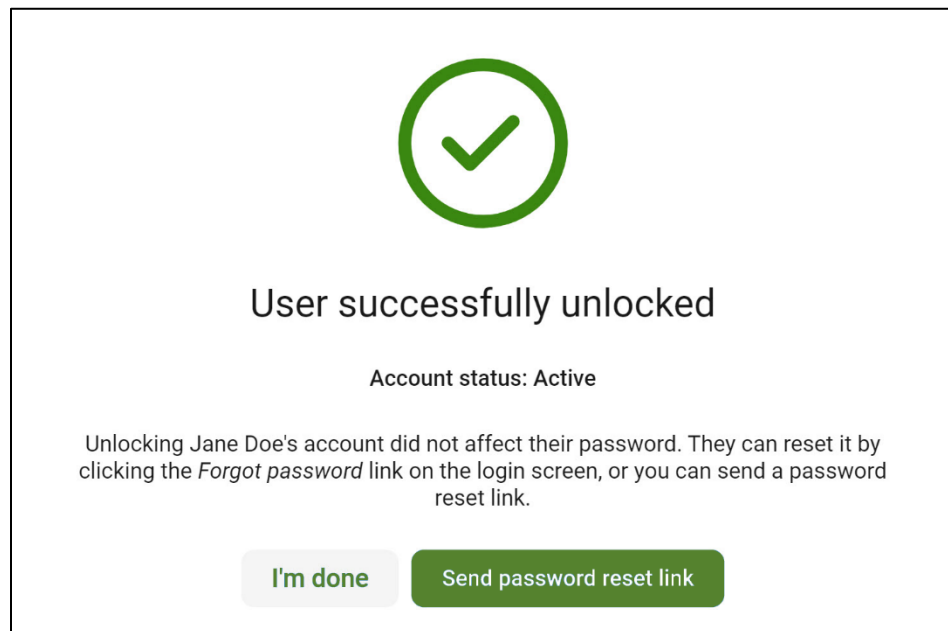
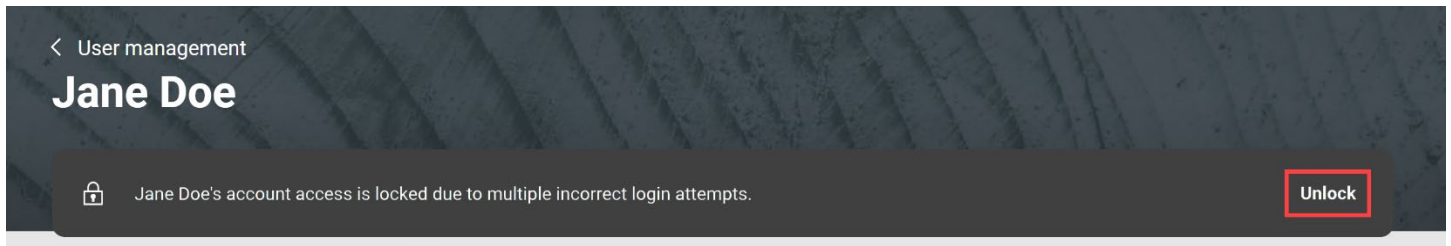
Select the locked user.



Step 3

Click **Unlock** and review the confirmation.

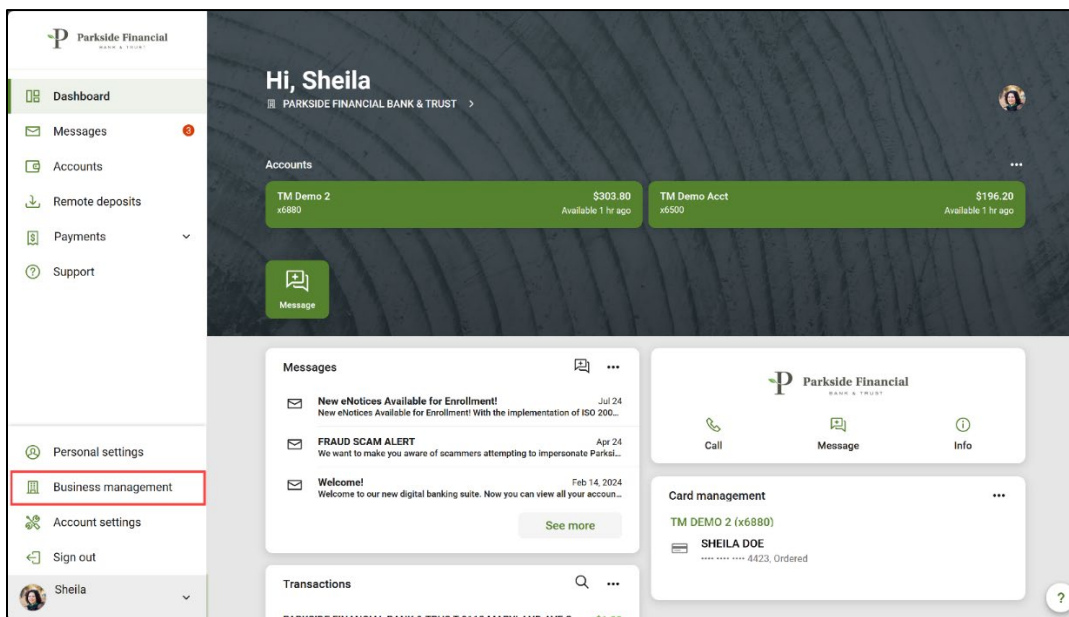
Please note: You can email the user a link to reset their password if they continue to have trouble. Otherwise, click **I'm Done**.



Reset a User's Password

Step 1

Click your profile and select **Business management**.



Step 2

Select the user to reset.

Step 3

Click the **ellipsis** icon and choose **Send password reset link** to email the user.

