


## Creating an Administrator Role with Full Access

### Create a Role

- Click the Business Admin Widget
- Click “Roles”
- Click [Add a Role]
- Name your Role
- Add a description
- Click [Create Role]



### Role Permissions

- Click the Pencil Icon  next to Permissions
- Choose “Select All” in each category
- Click [Save Changes]

### Accounts

- Click [Add Accounts]
- Click [Select All] next to Account Permissions
- Click [Choose Accounts]
- Click [Select All] at top right of account list
- Click [Assign # Accounts]

### Limits


- Click [Edit Limits]
- Check all Transactional Methods displayed
- Enter Maximum Daily, Weekly, and Monthly Limits for each transaction method  
(see [Maximum Transaction Limits reference on Page 2](#))
- Click [Save Changes]

### Create a User

- Scroll to the top
- Click “Users”
- Click [Add a User]
- Enter User information ( All fields are required)
- Select Role created above
- Click [Create User]

A temporary password will be sent to the email address entered. Please communicate the **Username** that you set for this user in order for them to log in for the first time.

## Maximum Transactional Limits

LIMITS 				
METHOD	DESCRIPTION	DAILY	WEEKLY	MONTHLY
<b>ACH Collections</b>	Authorized limit	\$100,000.00	\$700,000.00	\$1,000,000.00
	Max limit	\$100,000.00	\$700,000.00	\$1,000,000.00
	Can authorize	\$100,000.00	\$700,000.00	\$1,000,000.00
<b>ACH Payments</b>	Authorized limit	\$5,000,000.00	\$10,000,000.00	\$20,000,000.00
	Max limit	\$5,000,000.00	\$10,000,000.00	\$20,000,000.00
	Can authorize	\$5,000,000.00	\$10,000,000.00	\$20,000,000.00
<b>External Transfers</b>	Authorized limit	\$100,000.00	\$700,000.00	\$1,000,000.00
	Max limit	\$100,000.00	\$700,000.00	\$1,000,000.00
	Can authorize	\$100,000.00	\$700,000.00	\$1,000,000.00
<b>Internal Transfers</b>	Authorized limit	\$99,999,999.00	\$99,999,999.00	\$99,999,999.00
	Max limit	\$99,999,999.00	\$99,999,999.00	\$99,999,999.00
	Can authorize	\$99,999,999.00	\$99,999,999.00	\$99,999,999.00
<b>Wire Transfers</b>	Authorized limit	\$5,000,000.00	\$35,000,000.00	\$99,999,999.99
	Max limit	\$5,000,000.00	\$35,000,000.00	\$99,999,999.99
	Can authorize	\$5,000,000.00	\$35,000,000.00	\$99,999,999.99