



User Administration Guide

This User Administration Guide is provided for informational purposes only and is intended to assist authorized administrators in configuring and maintaining user access within BankUnited TreasurySuite. TreasurySuite features, functionality, user roles, permissions, approval workflows, account entitlements, security controls, and administrative capabilities are subject to change without notice. Administrators are responsible for maintaining appropriate user permissions, approval authorities, account assignments, approval limits, and internal controls.

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Defining a User

User-Based Permissions

BankUnited TreasurySuite is a user-based online banking system. Administrators manage user access through the User Maintenance feature, where they can create new users by entering required user information and assigning the appropriate permissions. Permissions may include access to payment processing, reporting, risk management, administrative functions, and alerts. Existing user profiles are also managed and maintained within User Maintenance.

How To Add a New User

Adding a user is a **four-step process**. As each step is completed, click the number to advance to the next step in the process (or click Continue at the bottom of the page).

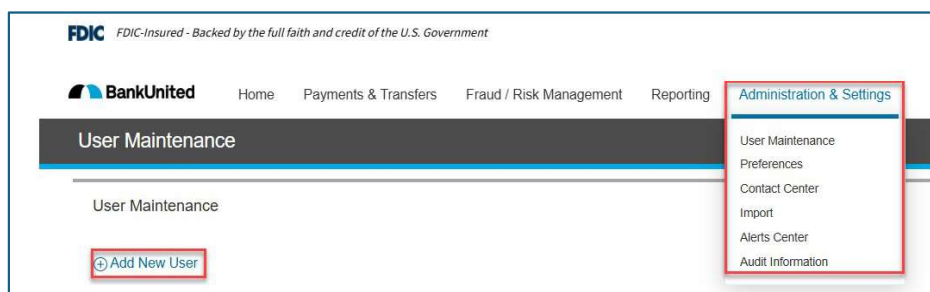
1. Enter the required user and administrative information.
2. Grant the user access to applicable features and functions available to your organization. These may include payment processing, reporting, risk management, administrative capabilities, and alerting functions.
3. Assign the bank accounts the user is authorized to access.
4. Apply approval limits for the transactions the user is permitted to initiate or approve.



The **User Maintenance** widget allows you to set up a new user, give permissions, assign accounts, and more.

Add New User

1. Select **User Maintenance** from the **Administration & Settings** menu.
2. Click **Add New User**.



3. In the **User Information** section, enter a **User ID**.
 - Minimum of 1 character with maximum of 20 characters
 - No special characters allowed
4. In the **Email** field, enter the user's email address.
5. In the **First Name** field, enter the user's first name.
6. In the **Last Name** field, enter the user's last name.
7. In the **Phone** field, enter a phone number.
8. (Optional) Enter a mobile number in the **Mobile Phone Number** field.
9. (Optional) Enter a fax number in the **Fax** field.
10. At **Locale**, *do not change* from English (United States).
11. Select a **Time Zone** for the user from the drop down list.
12. (Optional) Enter the user's street address in the **Address** field. (To add additional address lines, click **Add Another Address Line**.)
13. (Optional) Enter the **City**, **State/Province**, and **Postal Code**.

User Information

* User ID

* User Name

* Company

Address

City

State/Province

Postal Code

* Email

Phone

Mobile Phone Number

* Locale

English (United States) ▾

* Time Zone

US/Eastern ▾

Add another address line

14. (Optional) If you do not want this administrative user to be able to grant permissions to client users beyond his or her entitled permissions, check the **Cannot Grant Beyond Own Permissions** checkbox.

- This setting is only for administrators and is only for special circumstances.
- This is typically for administrators who only administer other services like Lockbox or Remote Deposit Capture and have no payment authority.)

15. (Optional) If you want to send emails to this user *each time* changes are made to an alert, check the **Send notification** checkbox.

16. The **Challenge Method** is automatically populated based on your company set up.

17. (Optional) If the company has been registered for mobile, the **Mobile User** checkbox is present.

- Check the box if you want the user to be able to use the mobile app and then click the **Register Mobile Device** button.
- Be sure to check this box if you want the user to have Remote Deposit Capture.

18. The **Copy an Existing User's Permissions** option lets you select a user from the company associated with the user you're creating and assign his or her permissions to the new user. You will still be able to modify any of these user permissions in later stages of the process. See Copy User.

Admin Settings

☐ Cannot Grant Beyond Own Permissions

☐ Display Full Account Numbers

☐ Send notification when an alert changes
User will be notified (via email) of a change to a personal alert. Or if an administrator, user will be notified of a change to any company alert

Challenge Method

One time passcode

×

▼

☐ Mobile User

Register Mobile Device

Revoke Mobile Device

Copy an Existing User's Permissions

Existing User

--Select--

▼

Next, you will grant payment permissions.

Setting Permissions

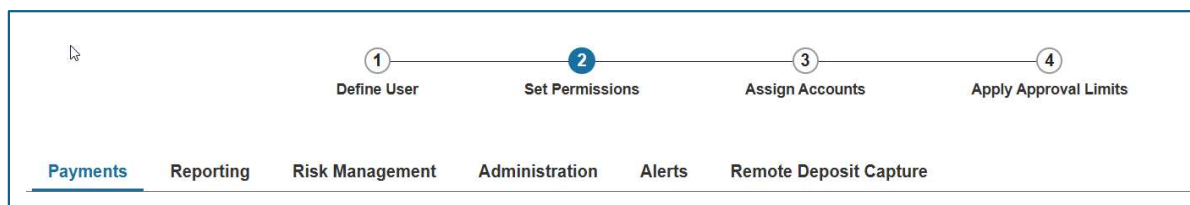
Payment Permissions

The **Payments** section of the **User Maintenance** screen allows you to grant access to payment types and then assign permissions by payment group or type. This is number 2 in the user maintenance steps.

Keep in mind that you will only see permissions for products/services in which your company is using.

Add Payment Permissions

1. At the top of the **User Maintenance** screen, the **Payments** tab is the default landing page under Set Permissions.



1. To assign all payment types available to your company within all payment groups, click the first **Select All** checkbox. Otherwise, select individual payment types under each payment group, such as wires and ACH. To assign all types within a group, check the appropriate boxes.

Select Payment Types
0 Payment Types Selected

Select payment types within each payment group

☐ Select All

Wires

☐ Select All

☐ Wire - Domestic
☐ Federal Tax Wire
☐ Wire - International

Transfer

☐ Select All
☐ Transfer

Loans

☐ Select All
☐ Loan Payment
☐ Loan Draw

ACH

☐ Select All

☐ Payroll
☐ Cash Concentration/Disbursement
☐ Consumer Collections

☐ Tax Payments
☐ Consumer Payments
☐ Corporate/Vendor Payments

☐ Cash Concentration
☐ Cash Disbursement
☐ Consumer Collections/Payments

☐ Child Support Payments
☐ Corporate Collections
☐ NACHA Pass Through

☐ NACHA File Import

Select Payment Settings

1. Click the drop down arrow beside **Assign Payment Permissions**.
2. In the **Payment Settings** section, click the appropriate checkbox to require the user to select beneficiaries from the Address Book for either **Payments** or **Templates**. Check both checkboxes if desired. If the Payment or Template box is checked this user will not be able to enter freeform beneficiaries when creating either a payment or template.
3. Click the appropriate button to select whether wire international payments may be made in **USD Only** or **Allow FX** (foreign exchange).
4. If you want to assign all payment and template permissions to the user, click the **Select All** checkbox under **Assigned Permissions**. Otherwise, proceed to assign payment groups or types individually.
 - Payment permissions are to make a payment either free form or from a template.
 - Template permissions are to create and modify templates.

You can choose to assign payments by payment group (for example, wires or ACH) or by payment type. Assigning by payment types is a more granular process since you are working with specific types under each payment group. For example, if you assign wire payments by payment type, you could choose settings for various types such as domestic wire or Fedwire payments.

Assign Payment Permissions

Payment Settings

Must select beneficiaries from Contact Center for: ☐ Payments ☐ Templates

Allow FX Payments to be made in : ☐ USD Only ☒ Allow FX ⓘ

Assigned Permissions

Assign Permissions

By Each Payment Group
By Each Payment Type

☐ Select All

Assign Payments by Payment Group

- With the **By Each Payment Group** button selected, make the desired assignments by clicking the tab corresponding to each payment group (for example, **Wires** or **ACH**), and then check the boxes corresponding with the individual permissions you want to assign.

Assign Permissions

By Each Payment Group
By Each Payment Type

- For each payment group, you can make both payment and template assignments. To assign all payments or all templates, check the **Select All** box at the head of each section. Or, you may modify each payment group permissions as needed.
- To assign all permissions under a selected payment group (such as wires), check the **Select All** box.

Payment Settings

Must select beneficiaries from Contact Center for: ☒ Payments ☐ Templates

Allow FX Payments to be made in: ☒ USD Only ☐ Allow FX ¹

Assigned Permissions Assign Permissions By Each Payment Group By Each Payment Type

☐ Select All

Wires **ACH**

☐ Select All

Payment Permissions

☐ Select All

Imports

☒ View ☒ Manage ☒ Modify ☒ Repair ☒ Approve ☒ Confidential

1 Approval

Templates

☒ View ☒ Manage ☒ Approve

1 Approval

Free Form

☒ View ☒ Manage ☒ Approve

Template Permissions

☐ Select All

Free Form

☒ View ☒ Manage ☒ Approve

Imports

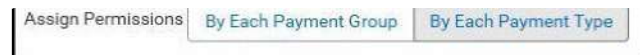
☒ View ☒ Manage ☒ Modify ☒ Repair ☒ Approve

System Permissions

View	User may only review the item and cannot make changes to it.
Manage	User may create the transaction, modify, and view it.
Approve	User may accept changes that another user has made.
Approve Own	User may approve a transaction they have initiated but it is a two-step process. After the transaction is initiated it is in an “entered” status. Then the second stop is to approve it.
Auto Approve	With this permission a transaction goes right to approval. There is no opportunity to view and check it. This permission is not often granted for payments.
Modify	User may view imports and make changes to the item.
Confidential	User has the ability to work with confidential import files.
Repair	User may fix transactions that have import or template errors.

Assign Payments by Payment Type

1. With the **By Each Payment Type** button selected, click the right arrow to drop-down each section corresponding to a payment type (such as Wire - Domestic or Transfer) and make assignments by checking the boxes corresponding to the appropriate permissions.

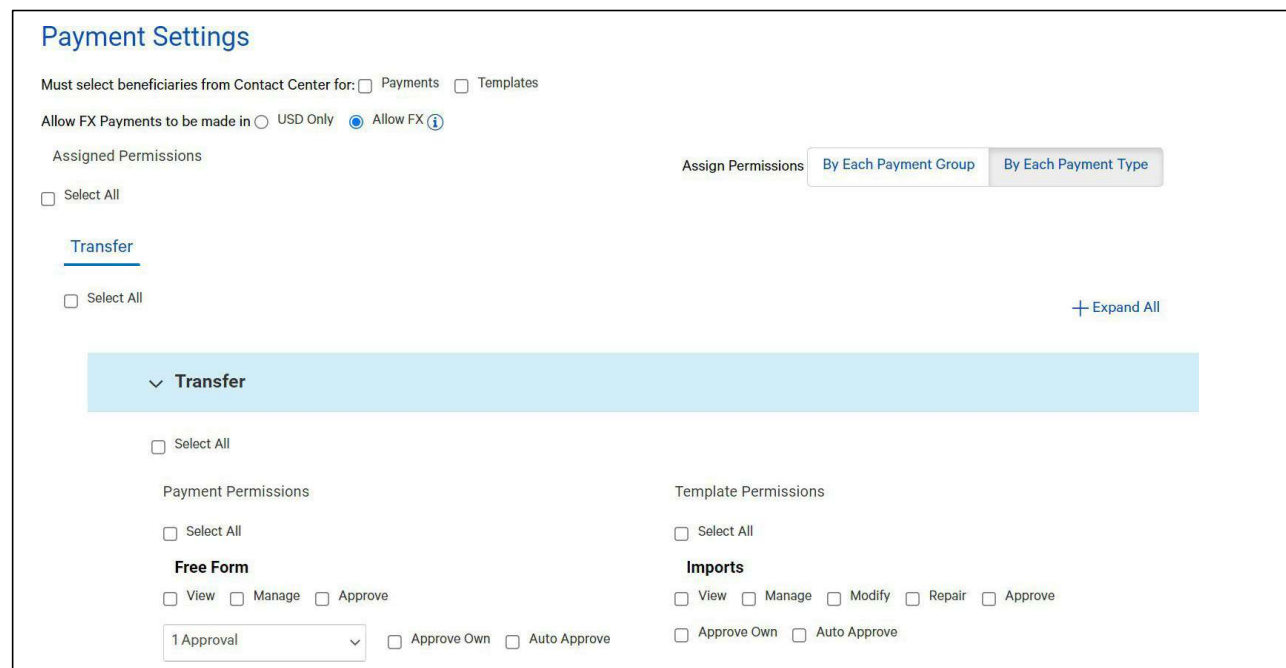


Assign Permissions **By Each Payment Group** **By Each Payment Type**

2. For each payment type, you can make both payment and template assignments. To assign all payments or all templates, check the **Select All** box at the head of each section.

To assign all permissions under a selected payment type (such as Wire – Domestic or International), check the **Select All** box.

Or, modify the specific permissions as needed.



Payment Settings

Must select beneficiaries from Contact Center for: ☐ Payments ☐ Templates

Allow FX Payments to be made in ☐ USD Only ☒ Allow FX ⓘ

Assigned Permissions

☐ Select All

Transfer

☐ Select All + Expand All

▼ **Transfer**

☐ Select All

Payment Permissions

☐ Select All

Free Form

☐ View ☐ Manage ☐ Approve

1 Approval ▼ ☐ Approve Own ☐ Auto Approve

Template Permissions

☐ Select All

Imports

☐ View ☐ Manage ☐ Modify ☐ Repair ☐ Approve

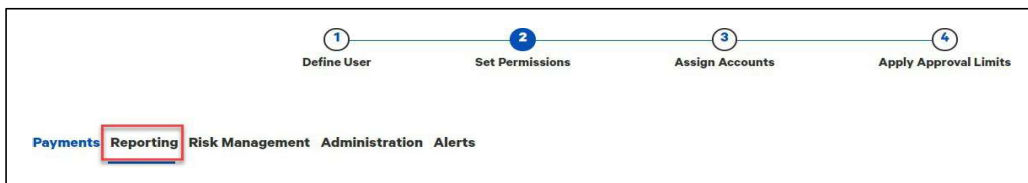
☐ Approve Own ☐ Auto Approve

Next, you will set up reporting entitlements.

The Reporting section of the User Maintenance screen allows you to grant the user permission to access various types of balance and transaction data including balance and transaction reports, eStatements, Legacy Reports, Lockbox Reports and Image Search.

Add Reporting Permissions

1. At the top of the **User Maintenance** screen, click **Reporting**.



2. To entitle the user to all available reports, check the **Select All** checkbox. Otherwise, select the individual checkbox(es) for the report or reports (for example, Balance & Transactions, eStatements, Image Search, Check Inquiry and more) you would like to entitle the user to.
3. For each report group, you can choose to entitle all reports or individual reports. Check the appropriate boxes.

Admin Reports		
☐ Select All		
☐ User Permissions	☐ Company Details	
Scheduled Export		
☐ Select All		
☐ Scheduled Export		
Balance & Transactions		
☐ Select All		
☐ Wire Transaction Report	☐ Current Day Transactions	☐ Previous Day Transactions
☐ Account Statement	☐ SWIFT MT942 Export	☐ SWIFT MT940 Export
☐ BAI Data Export	☐ QuickBooks Data Export	☐ QuickData Data Export
Recurring Payment Exceptions Report		
☐ Select All		
☐ Recurring Payment Exceptions		
Check Inquiry		
☐ Select All		
☐ Check Inquiry		
Payment and Template Background Processing Status		
☐ Select All		
☐ Payment and Template Background Processing Status		
Payment Reports		
☐ Select All		
☐ ACH Company	☐ Template Details	☐ Payment Details

Next, you will assign risk management entitlements.

The **Risk Management** section of the User Maintenance screen allows you to grant access to Risk Management functions such as Stop Payments, Check Inquiry, and

Positive Pay.

Add Risk Management Permissions

1. At the top of the **User Maintenance** screen, click **Risk Management**.



2. To entitle the user to all areas of Risk Management available to your company, check the **Select All** checkbox.

Otherwise, select the checkbox(es) for the permissions you want to grant.

- For example, to allow the user to manage ACH Positive Pay, select the **Manage** check box in the **Positive Pay Processing** row. To allow the user to accept Positive Pay decisions made by other users, select the **Approve** checkbox in the **Positive Pay Processing** row.
- For some areas of Risk Management, you can select **Select All** to assign all permissions.

The screenshot shows the 'Risk Management' tab selected in the navigation bar. The main content area displays several permission categories, each with a 'Select All' checkbox and a list of specific permissions with checkboxes. The categories and their permissions are:

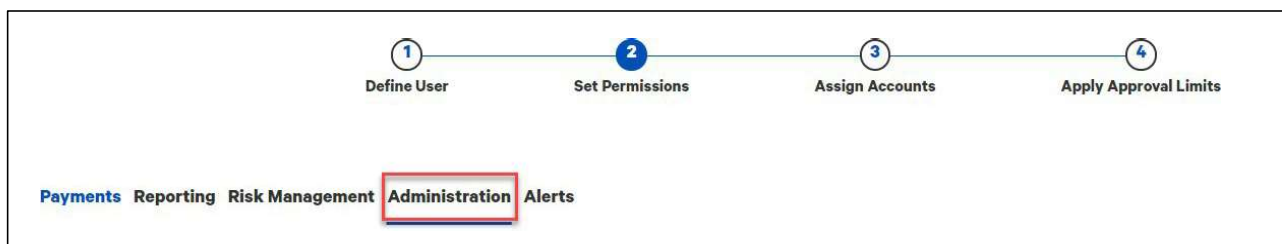
- Check Services**: ☐ Select All
- Check Issue/Void**: ☐ View, ☐ Manage, ☐ Approve, ☐ Approve Own, ☐ Auto Approve
- Import Check Issue/Void**: ☐ View, ☐ Manage, ☐ Approve, ☐ Approve Own, ☐ Auto Approve
- Stop Payments**: ☐ Select All
- Place Stop**: ☐ View, ☐ Manage, ☐ Approve, ☐ Approve Own, ☐ Auto Approve
- Cancel Stop**: ☐ View, ☐ Manage, ☐ Approve, ☐ Approve Own, ☐ Auto Approve
- Positive Pay Processing**: ☐ Select All
- Positive Pay Processing**: ☐ View, ☐ Manage, ☐ Approve, ☐ Approve Own, ☐ Auto Approve

The **Administration** section of the User Maintenance screen allows you to grant access to administrative functions on the client application such as Audit Information and User Administration to a user that is designated as the **company administrator**. You will not complete this section for any other user types.

NOTE: This is where you will grant access to **third party applications** like Remote Deposit Capture (desktop version only), Lockbox, Bill Pay, and others.

Add Administrative Permissions

1. At the top of the **User Maintenance** screen, click **Administration**.



2. To entitle the user to all areas of administration available to your company, check the **Select All** checkbox. Otherwise, select the checkbox(es) for the permissions you want to grant. Note that for some areas of Administration, you will be able to assign all permissions.

NOTE: The **Recipients** permissions is for Alerts. If a user is given the Manage permission, they may send an alert to anyone. If not, the user must select from a pre-defined list.

3. If you selected approve as an action in the last step:
 - a. Select the **Approve Own** check box if the user can approve items that he or she created.
 - b. Select the **Auto Approve** check box if an item should be automatically approved after the user creates it.

Payments
Reporting
Risk Management
Administration
Alerts
Remote Deposit Capture

☐ Select All

General Administration

☒ Select All

Audit Information

☒ View

Bank Account Settings

☒ View
☒ Manage

Maintain Confidential Import Settings

☒ View
☒ Manage
☒ Approve
☒ Approve Own
☒ Auto Approve

Email Recipients

☒ View
☒ Manage

Client Settings

☒ View
☒ Manage

Import Map

☒ View
☒ Manage

Beneficiary Address Book

☒ Select All

Beneficiary Address Book

☒ View
☒ Manage
☒ Approve
☒ Approve Own
☒ Auto Approve

Contact Types

☒ Business
☒ Employee
☒ Individual

User Administration

☒ Select All

User

☒ View
☒ Manage
☒ Approve
☒ Update User Settings
☒ Approve Own
☒ Auto Approve

Other Links

☐ Select All

FX Star

☐ View

Mortgage Warehouse Lending

☐ View

File Transmission

☐ View

Mineral Tree / Payable Automation

☒ View

Commercial PCARD

☐ View

Lockbox Imaging Archive (old)

☐ View

Lockbox Imaging Archive (new)

☒ View

Business Bill Pay

☐ View

Remote Deposit Capture

☒ View

OFX Direct Connect

☐ View

Payment Administration

☒ Select All

Payment Template Groups

☒ View
☒ Manage

Add User

Continue

Back

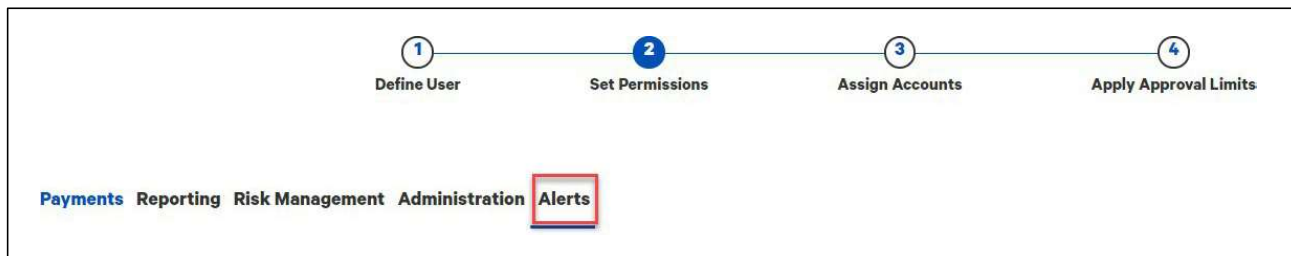
Cancel

Next, you will assign Alert entitlements.

The **Alerts** section of the User Maintenance screen allows you to grant permission to alerts for administration, reports, payments, and risk items.

Add Alerts Permissions

1. At the top of the **User Maintenance** screen, click **Alerts**.



- To entitle the user to all alerts, check the **Select All** checkbox. Otherwise, select the checkbox(es) for the alerts you want to grant access to. For example, to allow the user to receive Admin or Risk Management alerts, click those appropriate boxes.

Payments Reporting Risk Management Administration **Alerts**

☐ Select All

Admin Alerts

☐ Select All

☐ User Maintenance

Reporting Alerts

☐ Select All

☐ eStatements ☐ Summary Balance ☐ Incoming Wire Transactions

☐ Transaction Notification ☐ Controlled Disbursement Data is Available ☐ Scheduled Export is Available

Payment Alerts

☐ Select All

☐ Templates Awaiting My Approval ☐ Processed ☐ Transactions Processing Status Changed For Payments and Transfers

☐ Approver Rejected ☐ Payment Cutoff Time Warning ☐ Approval Window Passed

☐ File Import Confirmation For Payments and Transfers ☐ Payments Awaiting My Approval ☐ Automatically Created

Risk Management Alerts

☐ Select All

☐ File Import Confirmation For Stop and Cancel Payments

Add User Continue Back Cancel

You are now ready to add other applications, like Remote Deposit Capture, to the user. Most other third party applications are entitled in the Administration section.

If your company has Mobile Remote Deposit Capture with the Bank, you will also see the **Remote Deposit Capture** section of the User Maintenance screen. This allows you to grant permission to mobile remote deposit capture only (not the desktop version).

NOTE: The user must have the Mobile checkbox marked on the Define User step (1).

Add Remote Deposit Capture Permissions

1. At the top of the **User Maintenance** screen, click **Remote Deposit Capture**.

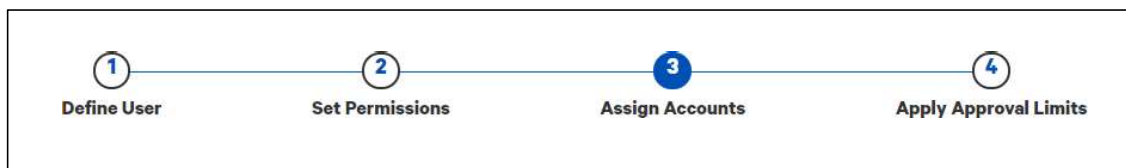
The screenshot shows the 'User Maintenance' screen with a progress bar at the top indicating four steps: 1. Define User, 2. Set Permissions, 3. Assign Accounts, and 4. Apply Approval Limits. Below the progress bar, there are tabs for 'Payments', 'Reporting', 'Risk Management', 'Administration', 'Alerts', and 'Remote Deposit Capture'. The 'Remote Deposit Capture' tab is highlighted with a red box. Below the tabs, there are checkboxes for 'Select All', 'Remote Deposit Capture', 'Select All', and 'MRDC'. At the bottom, there are buttons for 'Add User', 'Continue', 'Back', and 'Cancel'.

2. Click **Continue**.

You are now ready to assign accounts to the user.

Assigning Accounts

The **Assign Accounts** section of the User Maintenance screen allows you to assign the bank accounts that the current user can work with. If the user has permission to work with ACH payments, you must also select ACH originators that the user can work with. Other items that may need to be identified are Special Reports and Restricted Templates. This is number 3 in the user maintenance steps.



Assign Bank Accounts

1. At the top of the **User Maintenance** screen, the **Bank Accounts** tab is the default landing page under Assign Accounts.
2. Check the boxes corresponding to the payment types, reports, and functions that you want the user to be able to use with the specified account.
 - You can assign all accounts for all payment types by checking the **Payments**

checkbox.

- You can assign all current and future accounts to each of the assigned payment types by checking the appropriate checkbox in the **Apply All Current and Future Accounts** row. You can also choose to assign *all* current and future accounts to the user by checking all checkboxes in the row.
- You may customize the accounts such as giving the wire permission to all accounts or all permissions on one account but not others. See image below.

Bank Accounts														ACH Originators		Restricted Templates		Additional Bank Services								
Filter: Select fields																										
Apply All Current and Future Accounts														☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐		
														☐ Payments		☐ Report		☐ Risk Mgmt		☐ Remo/ Depos Captu						
Accounts														All ☐	Wire - Domestic ☐	Wire - International ☐	Transfer From ☐	Transfer To ☐	Check Inquiry ☐	Balance & Transactions ☐	Check Issue/Void ☐	Import Check Issue/Void ☐	Place Stop ☐	Cancel Stop ☐	Positive Pay Processing ☐	Mobil ☐
12345 - test loan - BANKUNIT														☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
33025 - JB PP TEST - BANKUNIT														☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
33316 - JB TEST PP - BANKUNIT														☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐		

NOTE: The report permissions that you can assign, such as **Balance & Transaction**, depend on the reports that you have assigned under the [Reports](#) section of User Maintenance.

If you have transfer payment permissions turned on for your company and wish to turn on the entitlements to the user, note that transfer account assignments are divided. You can assign accounts as either transfer-from or transfer-to accounts.

Bank Accounts														ACH Originators					
Filter: Select fields																			
Apply All Current and Future Accounts														☐	☐	☐	☐	☐	☐
														☐ Payments					
Accounts														All ☐	Wires ☐	Loans ☐	Transfer From ☐	Transfer To ☐	
CLNTACCNAMES90 - 1122334500 - BONY														☐	☐	☐	☐	☐	
CLNTACCNAMES91 - 1122334501 - BONY														☐	☐	☐	☐	☐	

You are now ready to assign ACH Originators to the user, if applicable.

Assign ACH Originators

1. Click **ACH Originators** at the top of the screen.

Bank Accounts **ACH Originators** Restricted Templates Additional Bank Services

Filter

☐ Apply All Current and Future Originators										
☐ Payments										
Originators	All	Payroll	Cash Concentration/Disbursement	Consumer Collections	Consumer Payments	Corporate/Vendor Payments	Cash Disbursement	Consumer Collections/Payments	Corporate Collections	NACHA Pass Through
	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Viewing 1-4 of 4 records Display per page < Page of 1 >

2. You can assign all accounts to the user by checking the **All** checkbox. Alternatively, you can choose to assign all ACH accounts by checking the **Payments** box.
3. You can assign all current and future accounts for payment types by clicking the **Apply All Current and Future Accounts** row.

You are now ready to assign Restricted Templates to the user, if applicable.

Assign Restricted Templates

If restricted templates are assigned to your company, you can select which templates the user may access.

1. At the top of the User Maintenance screen, click **Restricted Templates**. These are templates that are set up under a special assignment.

If a user does not have permission to work with one of these templates, they are not able to create, view, modify or approve them.

Bank Accounts ACH Originators **Restricted Templates** Special Reports

Filter

Apply All Current and Future Templates		☐	☒
Templates	All	☐	Templates ☒
68 Corporate Collections	☐		☒
112 Corporate Collections	☒		☒
84 Corporate Collections	☒		☒
30 Corporate Collections	☒		☒
78 Corporate Collections	☐		☒
30 Corporate Collections	☐		☒
83 Consumer Collections	☐		☒

Viewing 1-7 of 7 records

Display per page < Page of 1 >

2. You can assign all templates to the user by checking the **All** checkbox. Alternatively, you can choose to assign all templates by checking the **Templates** box.
3. You can assign all current and future templates by clicking the **Apply All Current and Future Templates** row.

Finally, you will apply approval limits for the transactions the user is entitled to approve.

Apply Approval Limits

The **Apply Approval Limits** section of the User Maintenance screen allows you to assign overall approval limits and limits associated with individual bank accounts assigned to the user. Overall approval limits indicate the maximum value of payments that the user can approve. Values in this section are expressed in the default currency of the company.

There are two types of limits: transaction, daily, or batch limits (for ACH payments).

- A transaction approval limit indicates the maximum amount of a single transaction. This limit applies to both wire and batch payments.
- A daily approval limit is the maximum total value of all payments that can be approved on a given value date.

Notes

- A user must also be granted permission to the approval action to approve payments.
- Payments and templates must pass all limit checks in order to be approved.



Overall Approval Limits Account Approval Limits

Wires Transfer Loans ACH

Wires Limits	Transaction Limit	Daily Limit	
Quickly Apply Limits			<button>Apply</button>
Wire - Domestic			
Wire - Drawdown			
Wire - Federal Tax Wire			
Wire - International			

Apply Overall Approval Limits

1. If the user will have approval permissions, with **Overall Approval Limits** selected, enter the transaction and daily limits for **each payment type** in the selected payment group (example: Wires, Transfer, Loans, and ACH)
2. To apply these limits to all payment types, in the group, enter the transaction and daily limit in the **Quickly Apply Limits** row, and then click **Apply**.
3. To assign approval limits to another payment group, click the group name.
4. Repeat the actions in Step 1 or 2 for the remaining payment types and groups assigned to this user.

Assign Account Approval Limits

1. Click **Account Approval Limits** at the top of the screen if this user will have any type of approval permissions.
2. Set approval limits by entering the transaction and daily limit in the appropriate text box. The types will be listed in separate tabs (Wire, Transfer, Loans, ACH, etc.).

Overall Approval Limits **Account Approval Limits**

Wires Transfer Loans ACH

Bank Accounts

Name	Account Number	Transaction Limit	Daily Limit
All accounts are assigned to this user for this payment type(s). Entered approval limit values apply to all accounts.			

Viewing 1-1 of 1 records

Display per page < Page of 1 >

Add User Back Cancel

- When you have finished granting all permissions to the user, click **Add User**.

Maintain & Update Users

Modify Existing User

An existing user may be modified by accessing the user record.

- Select **User Maintenance** from the **Administration & Settings** menu.

FDIC FDIC-Insured - Backed by the full faith and credit of the U.S. Government

BankUnited Home Payments & Transfers Fraud / Risk Management Reporting **Administration & Settings**

User Maintenance

User Maintenance

[+ Add New User](#)

- User Maintenance**
- Preferences
- Contact Center
- Import
- Alerts Center
- Audit Information

- Click the **View** actions drop down.
- Click **Modify**.

☐ All	Actions	User ID	User Name	Disabled	Status	Legal Administrator	Last Approved Date
☐	View	[REDACTED]	[REDACTED]	No	Approved	No	04/03/2026 00:32:57
☐	View	[REDACTED]	[REDACTED]	No	Approved	No	04/03/2026 00:33:08
☐	View	[REDACTED]	[REDACTED]	No	Approved	No	04/03/2026 00:33:09
☐	View	[REDACTED]	[REDACTED]	No	Approved	No	04/14/2026 10:37:40

Viewing 1-50 of 68392 records

4. The same four-step process opens when you edit an existing user as it does when adding a new user. Make modifications in **Define User, Set Permissions, Assign Accounts, and Apply Approval Limits**. See instructions on these steps earlier in this user guide.
5. View each step and/or make changes as needed. You may click the number to go immediately to that step in the process.
6. When all changes are made, click the Update button at the bottom of the page.
7. Follow the steps to approve the modification to an existing user, shown next in this user guide.

Approve New User or Modification to Existing User

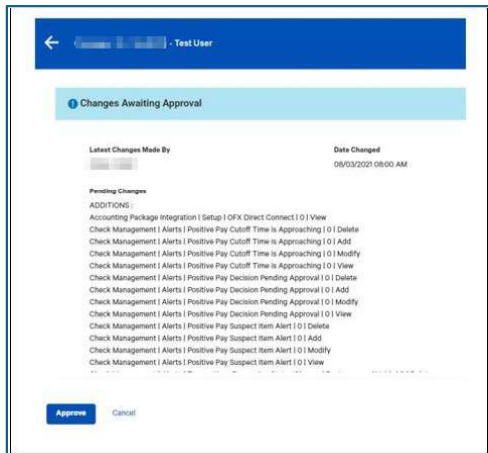
A new user record or a modified existing user record must be approved before it can be fully used by the individual. (The user can operate in a modified status but any changes which were made [e.g. adding a new service or deleting a service] will not be effective until the changes are approved.

Approve New User or Changes to Existing User

1. Find the new or modified user in the **User Maintenance widget**.
2. If New User:
 - Click the **View** actions drop down to review the entire record.
 - Click **Approve**.
3. If Existing User:
 - Click the **View** action drop down to review the entire record.
 - Click **View Changes** in the far right to view just the changes to the record.
 - Click **Approve**.

☐ All	Actions	User ID	First Name	Last Name	Disabled	Status	Last Approved Date	Last Login	Pending Changes	
☐	View	UID6344	L140c	or5pu	No	Approved				
☐	View	PTA002ME	Pioneer002	Title002	No	Modified	10/22/2021 15:04:22		Existing User	View Changes
☐	View	UID9564	0MQo2	S3X2v	No	Entered				New User

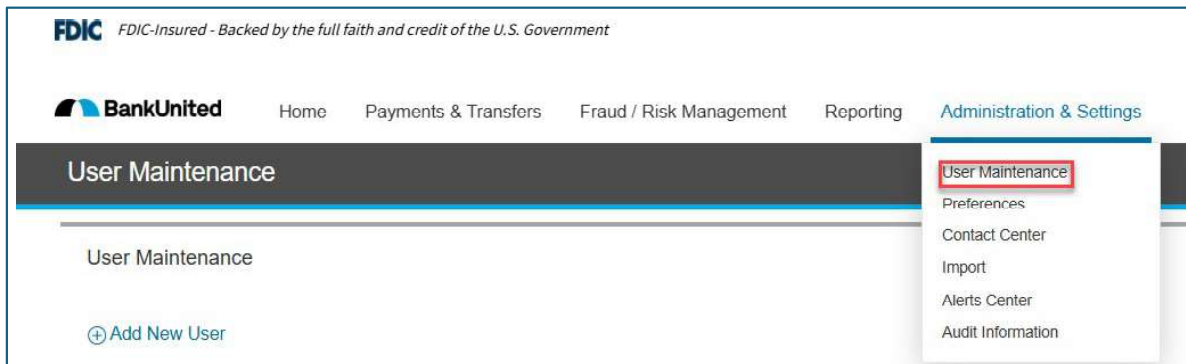
4. You will receive a message that the user is approved.



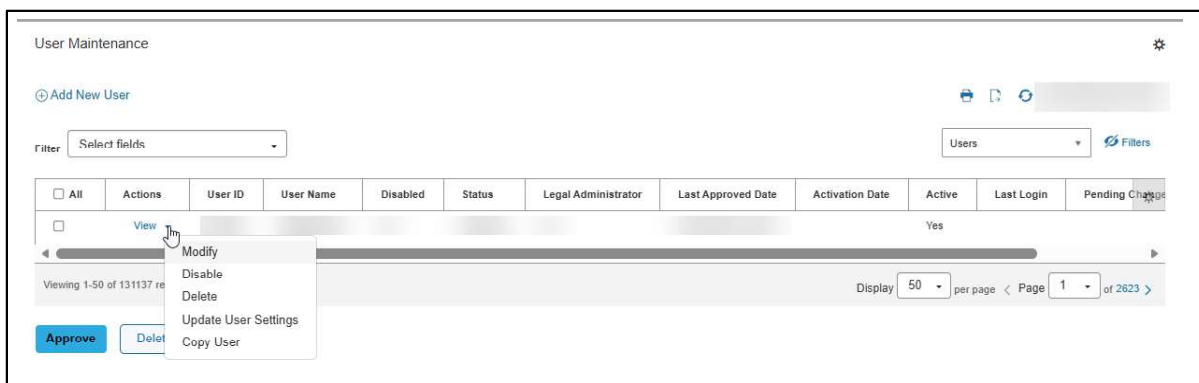
Delete User

You may remove an existing user due to leaving your company or taking a new position that does not require Treasury services. (If a user takes a leave of absence, you would not delete them but disable and then re-enable upon their return.)

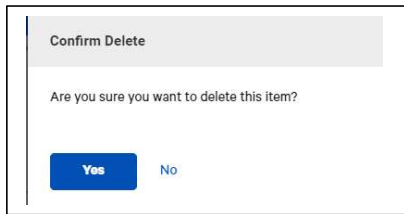
1. Select **User Maintenance** from the **Administration & Settings** menu.



2. Click the **View** actions drop down.
3. Click **Delete**.



4. Click **Yes** to confirm that you want to delete the user. Click No if necessary.



A dialog box titled "Confirm Delete" with a light gray header. Below the header, it asks "Are you sure you want to delete this item?". At the bottom, there are two buttons: a blue "Yes" button and a light blue "No" button.

5. You will receive a message stating the user is deleted.

Update User Settings

User Settings include adding/updating email and phone number plus resetting user passwords, unlocking users, viewing/resetting security questions.

Update User Settings

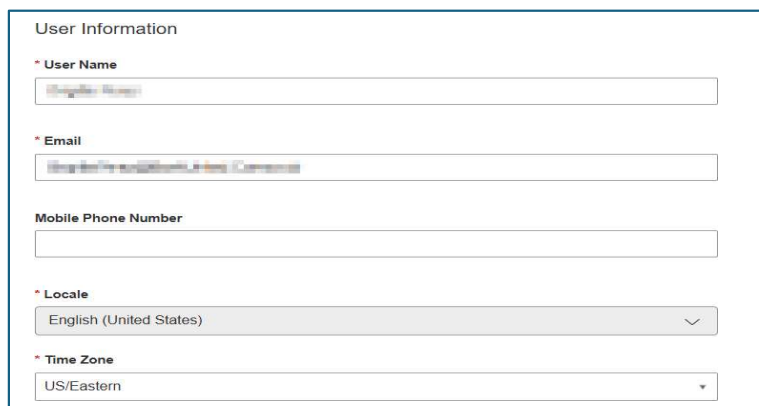
1. Click the **View** actions drop down.
2. Click **Update User Settings**.



The screenshot shows a user management interface. At the top left is a link "Add New User". On the right, there's a date and time "04/14/2026 01:26 PM". Below this is a "Filter" dropdown set to "Select fields" and a "Users" dropdown. A "Status" filter is set to "Is Not Deleted". The main part of the interface is a table with columns: All, Actions, User ID, User Name, Disabled, Status, Legal Administrator, Last Approved Date, Activation Date, Active, Last Login, and Pending. The table contains four rows of user data. The "Actions" column for each row has a dropdown menu. In the third row, the dropdown menu is open, showing options: View, Modify, Disable, Delete, Update User Settings (highlighted with a red box), and Copy User.

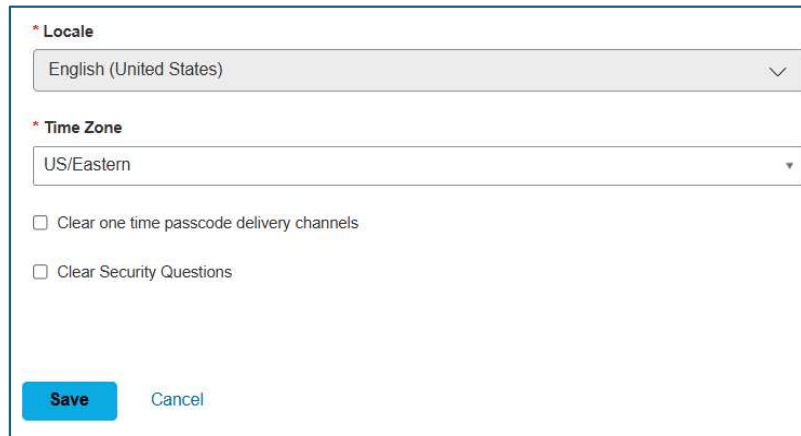
All	Actions	User ID	User Name	Disabled	Status	Legal Administrator	Last Approved Date	Activation Date	Active	Last Login	Pending
☐	View	123456789	John Doe	No	Approved	No	04/03/2026 00:32:57		Yes		
☐	View	987654321	Jane Smith	No	Approved	No	04/03/2026 00:33:08		Yes		
☐	View	567890123	Mike Johnson	No	Approved	No	04/03/2026 00:33:09		Yes		
☐	View	345678901	Sarah Brown	No	Approved	No	04/14/2026 10:37:40		Yes		

3. Modify **email and mobile phone**.



A form titled "User Information". It contains several fields: "User Name" (text input), "Email" (text input), "Mobile Phone Number" (text input), "Locale" (dropdown menu set to "English (United States)"), and "Time Zone" (dropdown menu set to "US/Eastern").

4. Under the **Other User Information** heading, you may complete the following actions.
 - Click the appropriate checkbox to perform an action.
 - **Clear One-Time Passcode (OTP) Delivery Channels** – Use this option when a customer needs their OTP delivery methods reset (for example, after a phone or device change); selecting Clear one time passcode delivery channels removes all existing OTP delivery mechanisms so the user can re-register them at next login.
 - **Clear Security Questions** – Clears out the user’s security questions. The next time the user logs in, they are prompted to set up new questions.
5. Click **Save**.



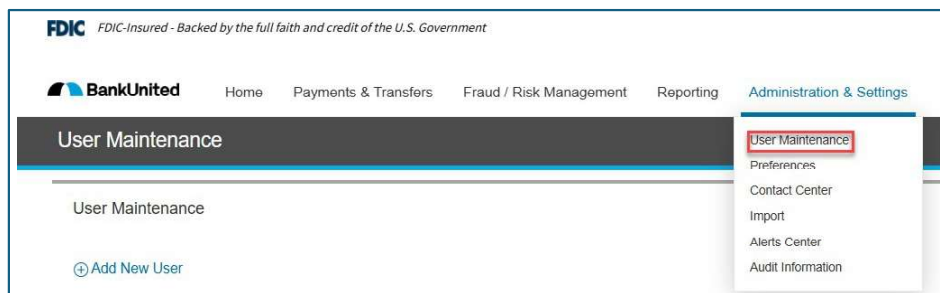
The screenshot shows a form titled "Other User Information". It contains two dropdown menus: "Locale" with "English (United States)" selected, and "Time Zone" with "US/Eastern" selected. Below these are two checkboxes: "Clear one time passcode delivery channels" and "Clear Security Questions", both of which are currently unchecked. At the bottom of the form are two buttons: "Save" (in blue) and "Cancel" (in light blue).

Copy User

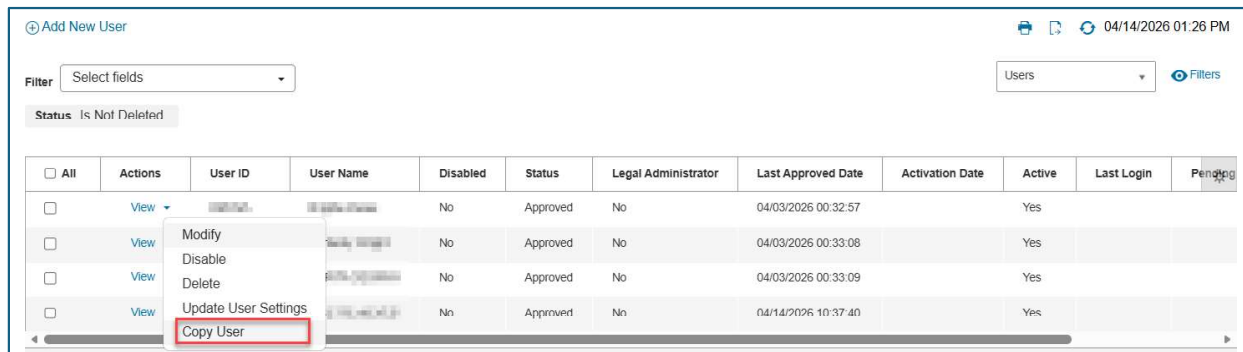
Copy an existing user to create a new user is accomplished by using the copy feature in the User Maintenance list View actions or 2) when you are adding a new user. You may use this functionality to easily copy an existing user’s permissions, accounts, and/or approval limits.

Copy User from User Maintenance List

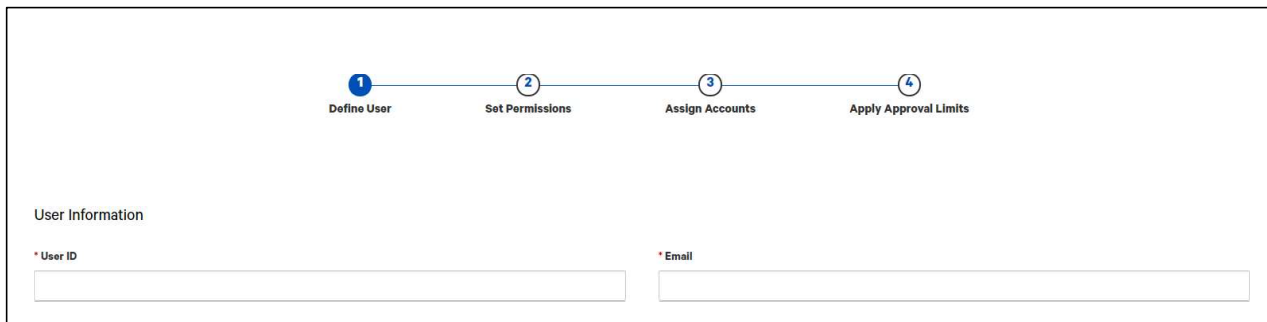
1. Select **User Maintenance** from the **Administration & Settings** menu.



2. Click the **View** actions drop down on the user you want to copy.
3. Click **Copy User**.

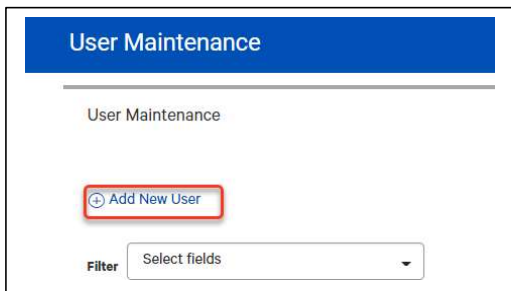


4. The Add User page opens.
5. Complete as you would a new user. The copied user's permissions, accounts, and/or approval limits

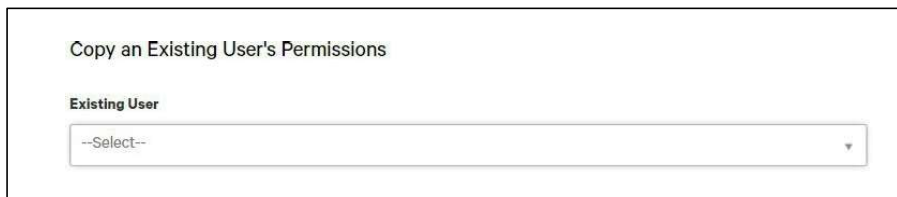


Copy User Directly from Add New User

1. Select **User Maintenance** from the **Administration & Settings** menu.
2. Click **Add New User**.



3. Follow the steps in the Add New User topic of this user guide.
4. In the **Copy an Existing User's Permissions**, select the user desired from the drop down list.



5. Continue entering the new user.
6. The copied user's permissions, accounts, and/or approval limits are presented. You may either accept all or some.