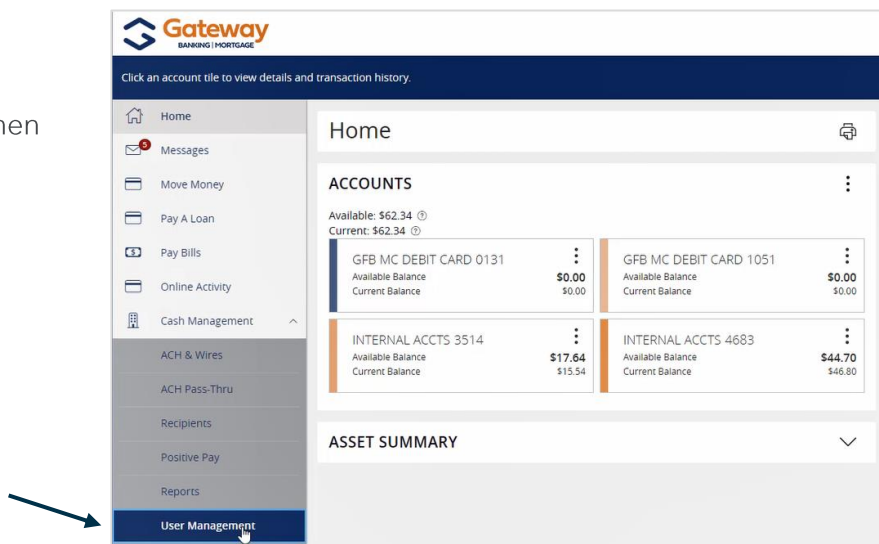


## Managing Existing Online Users

1. Select 'Cash Management' menu and then select 'User Management'

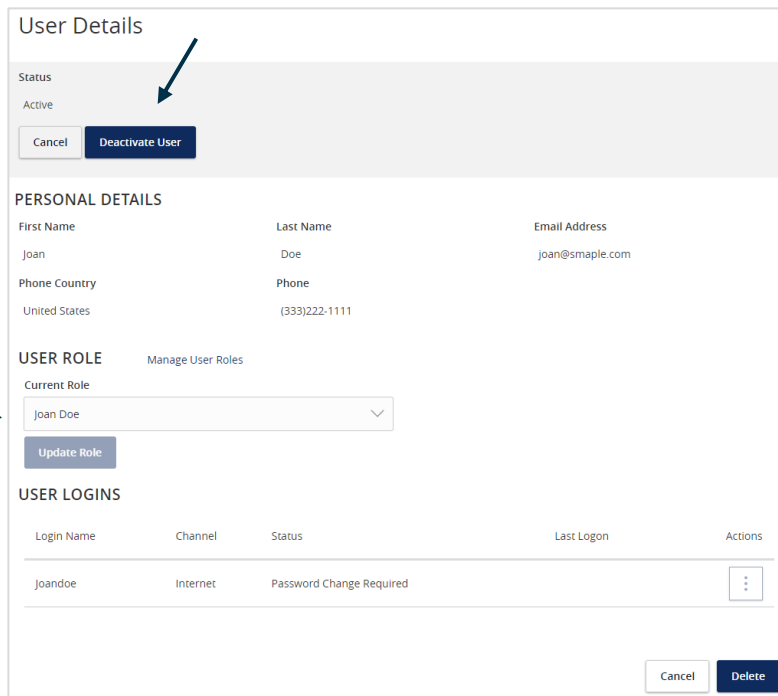


2. Click on the pencil icon next to the user you wish to edit.



3. One of three update actions may be made to an existing user:

- Select 'Deactivate User' to disallow a user from logging in without completely deleting the user.
- Select the 'User Role' drop down menu to update the 'User Role' for a user. Click 'Update Role' upon completion.
- Select the 'Delete' button to permanently delete the online user. This action cannot be undone.



**User Details**

Status: Active  
 Cancel Deactivate User

**PERSONAL DETAILS**

First Name: Joan Last Name: Doe Email Address: joan@smample.com  
 Phone Country: United States Phone: (333)222-1111

**USER ROLE** Manage User Roles  
 Current Role: Joan Doe  
 Update Role

**USER LOGINS**

Login Name	Channel	Status	Last Login	Actions
joandoe	Internet	Password Change Required		

Cancel Delete

**NOTE:** The User Role update will go into effect upon the user's subsequent logon after the change has been made.

## Creating New Online Users

- Click the 'Add User' button.



**User Management**

Search Users

User	Email Address	Role	Status	Last login	
Jane Doe	heidi.hake@q2.com	Company Admin	Active	4 minutes ago	
Q2 Biz	kathleen.emery@q2.com	Company Admin	Active	6 hours ago	

Add User

2. Complete all fields.
3. Click the 'Save New User Detail' button when done.

**NOTE:** Reference the User Roles setup guide for assistance with setting up a 'User Role'.

### New User Details

#### PERSONAL DETAILS

First Name

Last Name

Email Address

Phone Country

▼

Phone

#### LOGIN DETAILS

Login ID

Password

Confirm Password

User Role

Unassigned ▼

Discard New User Details

Save New User Details