

Access through Online Banking:  
Go to Treasury Services > Select Remote Deposit.

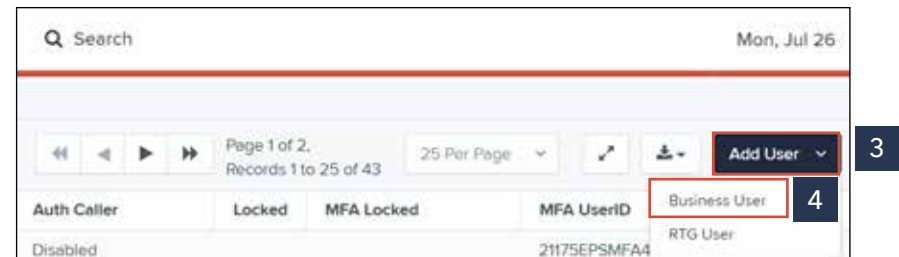
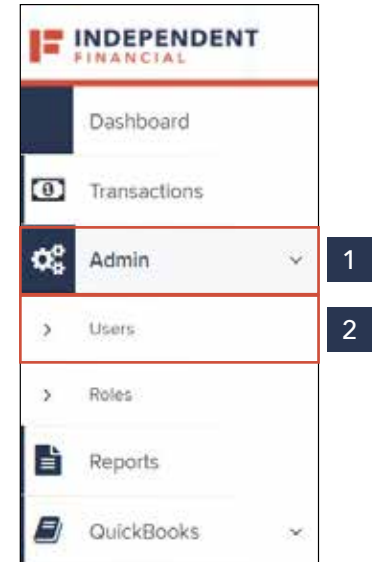
or

Access through an internet browser: Enter the following URL:  
<https://smartpay.profitstars.com/business/login>

## CREATING A NEW USER

1. On the left hand menu, select **Admin**.
2. Select **Users**.
3. Select **Add User**.
4. Select **Business User**.

Note: Do not select RTG User as this will cause an issue on the backend.



## 5. Add User Settings

- **Full Name:** Enter the name of the user.
- **User Name:** Enter the username.
- **Q2 Online ID:** Enter their Independent Financial (IF) online banking username.

Note: The Q2 Online ID must match the IF online banking username for Single Sign On to properly work.

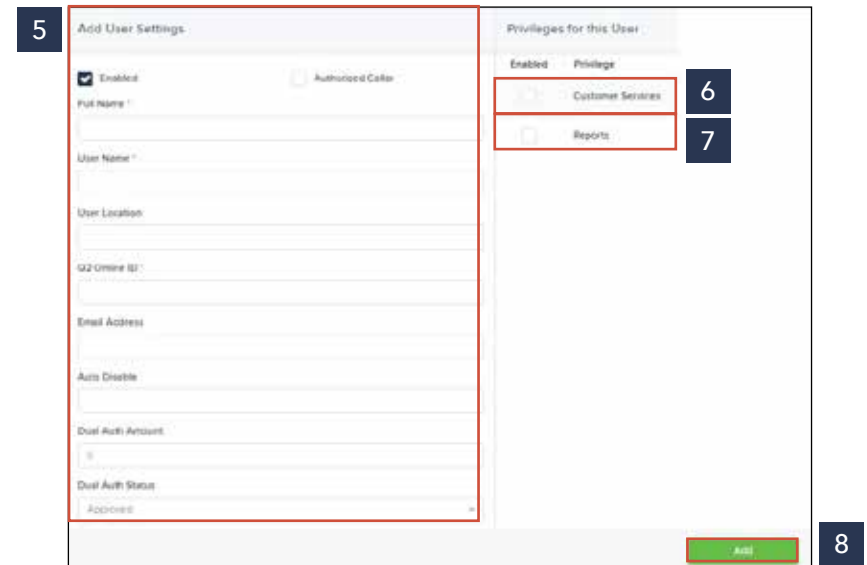
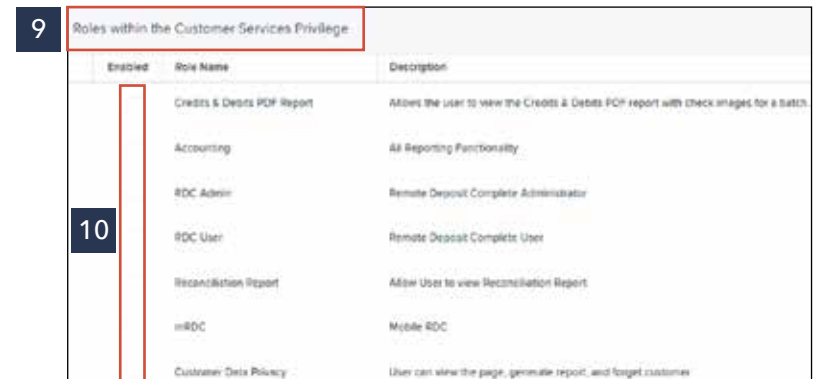
- **Email Address:** Enter the user's email address.

Note: The below fields are unsupported.

- Auto Disable
- Dual Auth Amount
- Dual Auth Status

6. Check the **Customer Services** box to enable access.
7. Check the **Reports** box to enable access.
8. Select **Add**.
9. Select **Roles within the Customer Service Privilege** to expand the dropdown menu.
10. Check applicable boxes to **Enable** access.

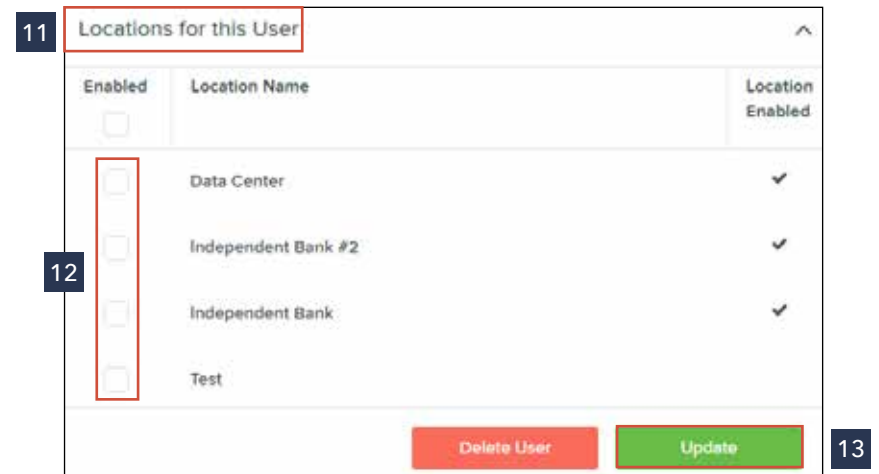
Note: **RDC Admin** access is required for a user to Close a Deposit.

Enabled	Role Name	Description
<input type="checkbox"/>	Credits & Debits PDF Report	Allows the user to view the Credits & Debits PDF report with check images for a batch.
<input type="checkbox"/>	Accounting	All Reporting Functionality
<input type="checkbox"/>	RDC Admin	Remote Deposit Complete Administrator
<input type="checkbox"/>	RDC User	Remote Deposit Complete User
<input type="checkbox"/>	Reconciliation Report	Allow User to view Reconciliation Report.
<input type="checkbox"/>	mRDC	Mobile RDC
<input type="checkbox"/>	Customer Data Privacy	User can view the page, generate report, and forget customer

11. Select **Locations for this User** to expand the dropdown menu.
12. Check applicable boxes to **Enable** account access.
13. Select **Update**.

The User Setup page is used by the administrator to manage their users. After additional users are added, please contact Treasury Support for assistance with linking the SSO.

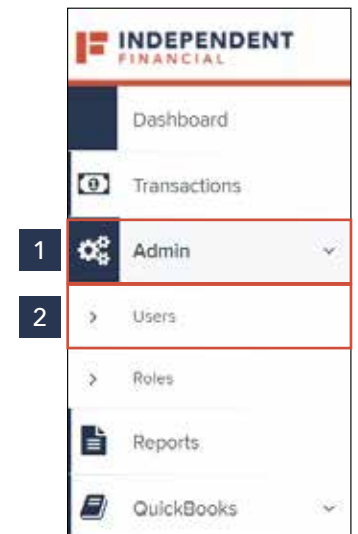


Enabled	Location Name	Location Enabled
<input type="checkbox"/>	Data Center	✓
<input type="checkbox"/>	Independent Bank #2	✓
<input type="checkbox"/>	Independent Bank	✓
<input type="checkbox"/>	Test	

Buttons: Delete User (red), Update (green)

## UNLOCKING A USER


1. Select **Admin** on the left hand menu to expand the dropdown menu.
2. Select **Users**.
3. Select **Unlock** under the Locked column.



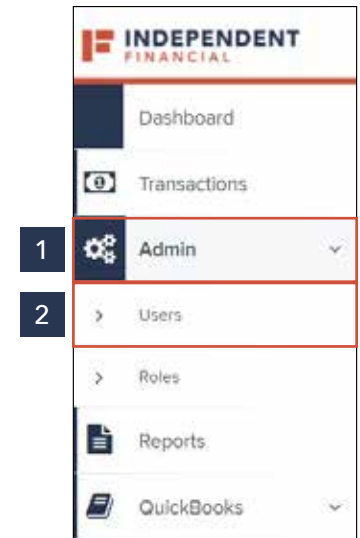
- Dashboard
- Transactions
- Admin**
  - Users**
  - Roles
  - Reports
  - QuickBooks

View	Edit	User Name	Full Name	Enabled	Auth Code	Locked	MFA Locked
		admin	Independent Bank #2	Enabled	Enabled	<input type="checkbox"/>	<input type="checkbox"/>
		admin	Independent Bank	Enabled	Enabled	<input type="checkbox"/>	<input type="checkbox"/>
		admin	Independent Bank	Enabled	Disabled	<input type="checkbox"/>	<input type="checkbox"/>
		admin	Independent Bank	Enabled	Enabled	<input type="checkbox"/>	<input type="checkbox"/>

## RESETTING A PASSWORD

1. Select **Admin** on the left hand menu to expand the dropdown menu.
2. Select **Users**.
3. Select the pencil icon  next to the user's name.
4. Select **Reset Password**
5. Select **Copy Password** to manually send the temporary password to the user.

Note: The Copy Password Reset Link is not supported.



View	Edit	User Name	Full Name
	 3	User1	Test User
		UserGuide1	User Guide




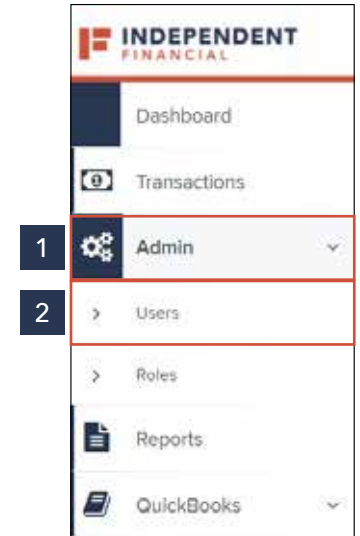
A screenshot of the user edit form. The 'Reset Password' button at the bottom is highlighted with a red box and a '4' callout. The form contains fields for Full Name, User Name, User Location, SW Online ID, Email Address, Auto Disable, Trial Auth Amount, Trial Auth Status, Approval, and Enable NDR.



A screenshot of the action bar at the bottom of the page. It contains a 'Reset Password' button (highlighted with a red box and a '5' callout), a 'Temporary Password' field with the value 'Gxrg%3832', a 'Copy Password' button, and a 'Copy Password Reset Link' button.

DISABLING A USER

1. Select **Admin** on the left hand menu to expand the dropdown menu.
2. Select **Users**.
3. Select the pencil icon  next to the user's name.
4. Uncheck the **Enabled** box.
5. Select **Update**.



View	Edit	User Name	Full Name
		User1	Test User
		UserGuide1	User Guide

Update User Settings

**Enabled**  Authorized Code

Full Name \*

First Name

Last Name

User Name \*

Username

User Location

Q2 Online ID \*

Identified

Email Address

Auto Disable

Dual Auth Amount

Dual Auth Status

Assignment

Enable KDR

Privileges for this User

Enabled	Privilege
<input checked="" type="checkbox"/>	Customer Services

Roles within the Customer Privilege


Locations for this User

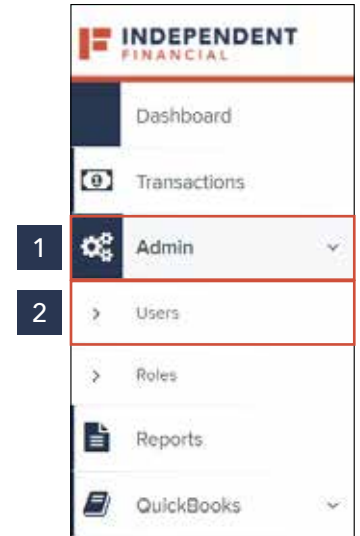
Reset Password

Disable User

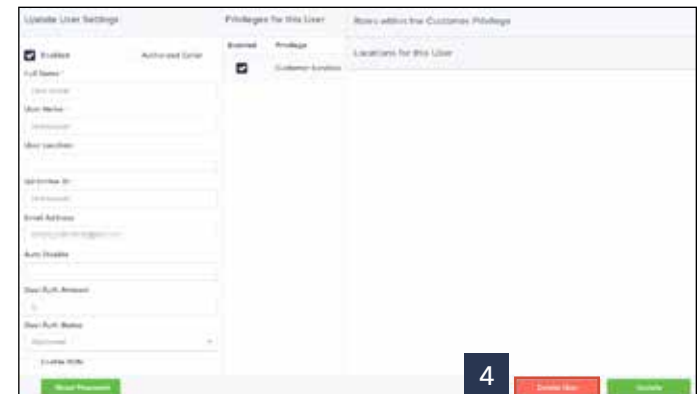
Update

## DELETING A USER'S PROFILE

1. Select **Admin** on the left hand menu to expand the dropdown menu.
2. Select **Users**.
3. Select the pencil icon  next to the user's name.
4. Select **Delete User**.
5. Select **Yes**.



View	Edit	User Name	Full Name
		User1	Test User
		UserGuide1	User Guide



**Confirm Delete:**

Are you sure you want to delete this user?

5
Yes
No