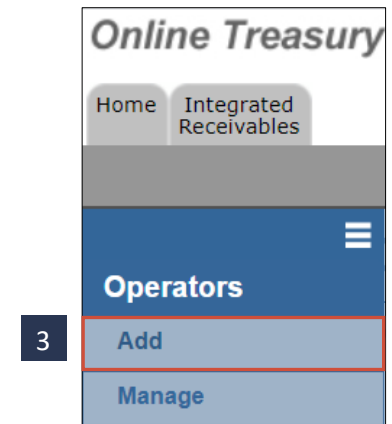
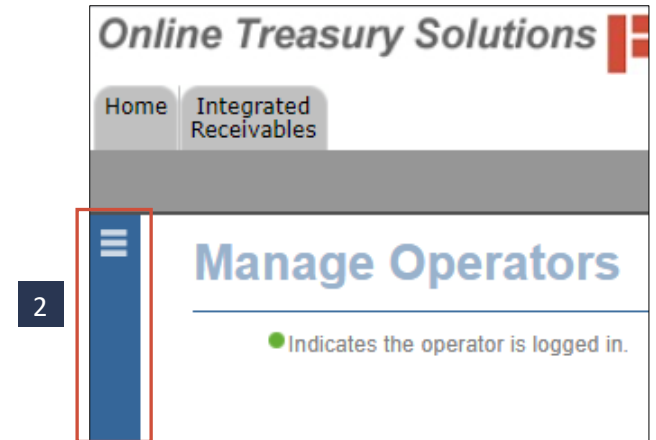
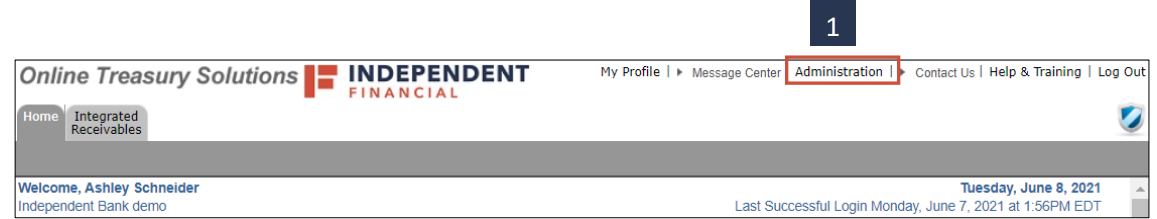


1. On the top right hand menu bar, click **Administration**.

2. Hover over the blue navigation bar to expand the menu.

3. Click **Add** under Operators.



## 4. Enter the User Information.

- **Operator ID** (username)
- **First Name**
- **Last Name**
- **Street**
- **City**
- **State/Province**
- **Zip/Postal Code**
- **Country**

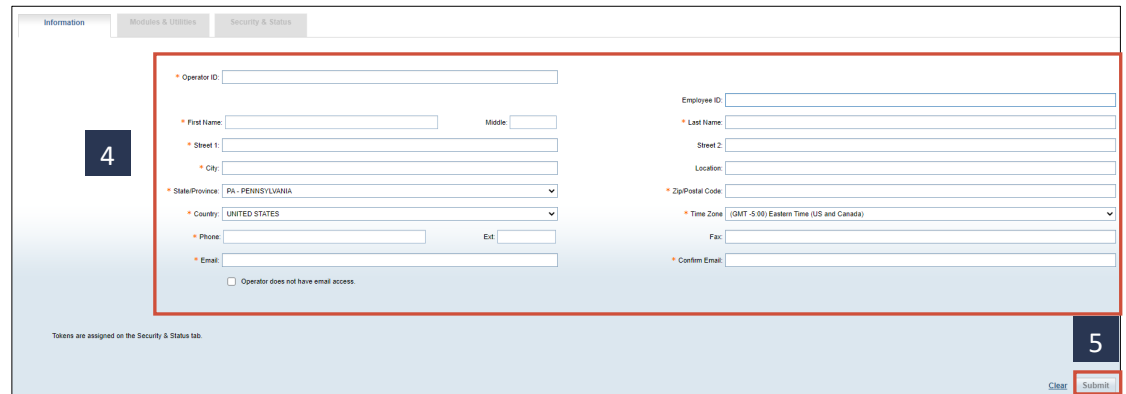
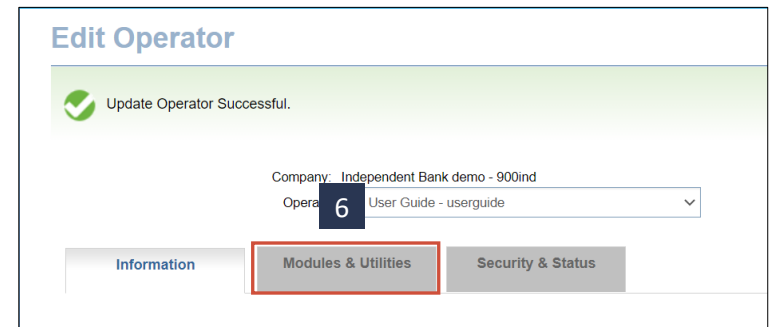
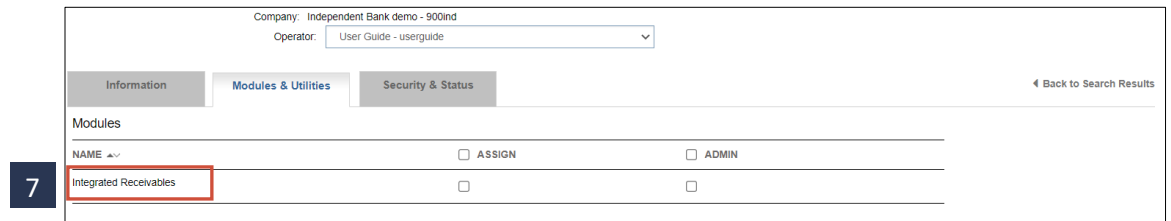
Note: System defaults to United States

- **Time Zone**  
Note: System defaults to (GMT - 5:00 Eastern Time (US and Canada))
- **Phone**
- **Email**
- **Confirm Email**

## 5. Click **Submit**.

## 6. Click the **Modules & Utilities** tab.

## 7. Click on **Integrated Receivables**.

8. The lockbox will be displayed to assign access. Check the **Lockbox Access** box to assign to the user.
  - If applicable, check the **Exception Manager** box if you have elected to utilize this service.

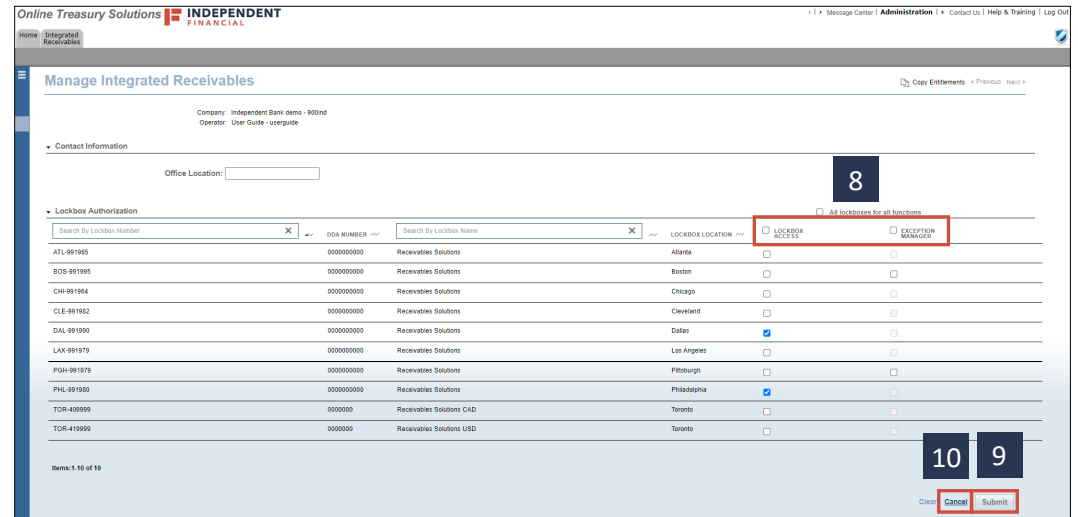
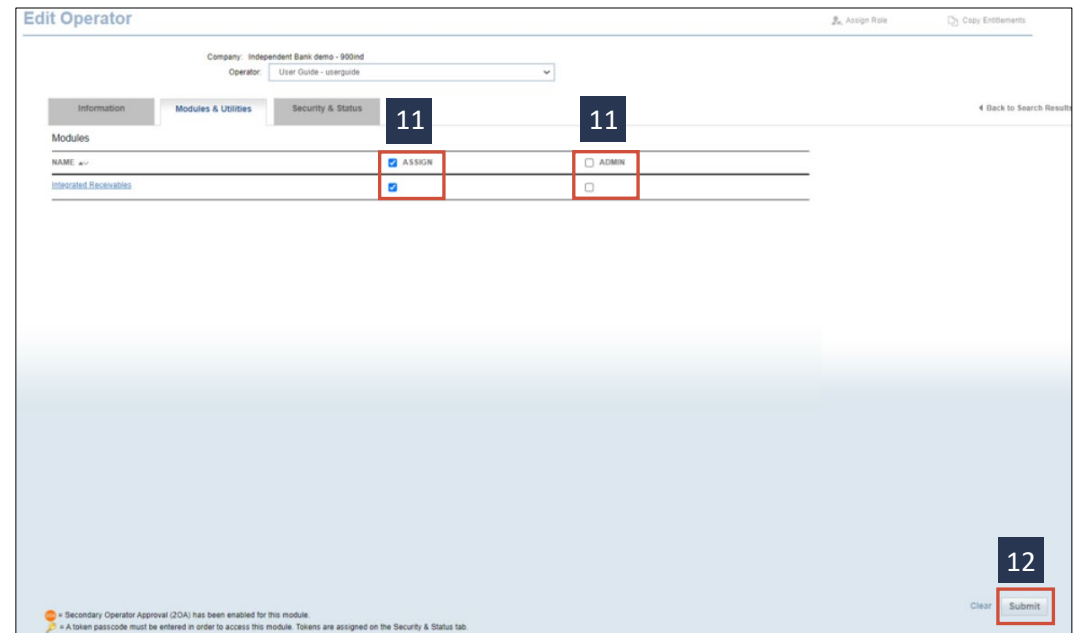
9. Click **Submit**.

10. Click **Cancel** to be taken back to the operator screen.

11. Check the box to **Assign** Integrated Receivables.

Optional: Click **Admin** to give administration access.

12. Click **Submit**.

13. Click the **Security & Status** tab.

14. Click **Change Password**.

**Edit Operator**

Company: Independent Bank demo - 900ind  
Operator: User Guide - userguide

Information Modules & Utilities **Security & Status** 13

Operator Status

DESCRIPTION	STATUS	ACTION
Operator ID	Enabled	<a href="#">Disable</a>
Password	Password Not Set	<b>14</b> <a href="#">Change Password</a> <a href="#">Approve Password</a>
Password Strike Count		<a href="#">Unlock/Clear</a>
Security Questions	Not Enrolled	<a href="#">Prompt Re-enrollment</a>
Session		<a href="#">Clear</a>

▼ Tokens

Tokens are only required to access modules that allow for external funds movement, or at login if your company has elected that setting. Optionally, you can require an individual operator to use a token at login regardless of modules assigned.

Physical Token

Require token passcode entry at login ☐

If checked, this operator must enter a token passcode at every login regardless of module assignments (optional).

[Clear](#) [Submit](#)

15. A password will need to be created for the user. There are two options:

### 15.1. Option 1 (Recommended): Create the New Password.

- On the Change Password screen, enter a password that follows the rules listed next to the New Password field.
- Click **Submit**.

Note: Remember to provide the password created to the user.

15.2. Option 2:  
**Send a Random Password.**  
 – Click **Send a Random Password.**

Note: The user will be emailed a system generated password.

Change Password

15.1

Company:  98765  
Operator:  12345678

New Password:

Verify Password:

Cancel

Submit

The following rules apply to all passwords:

- The password must be at least 8 characters and no more than 14 characters in length.
- The password must contain at least one letter, one number and one special character.
- The password must not:
  - contain three of the same character used consecutively,
  - contain spaces or `<`, `>`, `~`, `^` characters,
  - equal your Company User ID or Operator ID,
  - contain a recently used password

**Password note:** Passwords are case-sensitive. You must type the password at login exactly as you establish it here. UPPERCASE and lowercase letters may be used, but using a MIXEDCASE password is not required.

[Password Security Tips](#)

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16. To finalize the setup and enable the new lockbox user, please contact our Treasury Support team at 833.635.9291.