

ADMIN GUIDE: ENABLING SSO

ADDING SSO ENTITLEMENT

- 1. On the left hand menu, select Administration.
- 2. Choose User Roles from the drop down menu.
- 3. Select the *Pencil Icon* to edit.

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		Mailbox			Create Role	
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		Pay & Transfer	~			
		Treasury Services	~	USER ROLE TEMPLATES		\checkmark
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1	≡	Administration	^	Name * Description	Users 🔺	
		Company Settings			None	
		User Management		Administrator 2 INONE		
2		User Roles				3

REMOTE DEPOSIT CAPTURE (RDC)

- 1. Select the Features tab.
- 2. Select **ProfitStars RDCSSO Entitled Linkout** located under the System Values section.
- 3. Select Save.
- Contact Treasury Management Support at 833.635.9291 or <u>treasury.support@ibtx.com</u> to complete the user setup.

User Roles SSO Test					
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ProfitStars RDC SSO Entitled Linkout					



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LOCKBOX

- 1. Select the Features tab.
- 2. Select Enable PNC Lockbox located under the SSO section.
- 3. Select Save.
- 4. Contact Treasury Management Support at 833.635.9291 or treasury.support@ibtx.com to complete the user setup.

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ACH & CHECK POSITIVE PAY

- 1. Select the **Features** tab.
- 2. Select Positive Pay located under the Link Out section.
- Optional: To allow users access to Positive Pay via their mobile device select Centrix ETMS located under the Rights section.
- 4. Select Save.
- 5. Contact Treasury Management Support at 833.635.9291 or <u>treasury.support@ibtx.com</u> to complete the user setup.

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RIGHTS	IGHTS		
Access to all payment templates		Allow one-time recipients	
Centrix ETMS		✓ Manage Recipients	
Manage Users		Recipient upload from batch	
View All Recipients		View Wire Activity	
Wire upload from batch (requires Multi-Wire	2)		
LINK OUT			
Positive Pav		× 2	



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BILL PAY

- 1. Select the Features tab.
- 2. Select Enable iPay BBP Access located under the Custom Features section.
- Optional: If you would like to allow the user(s) to be a Bill Pay admin, also select iPay Business Billpay Admin.
- 4. Select Save.

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3	iPay Business Billpay Admin 🗸	

E-STATEMENTS

- 1. Select the Features tab.
- 2. Select **CSI Estatement SSO** located under the SSO section.
- 3. Select Save.

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	Overview Features Accounts	
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