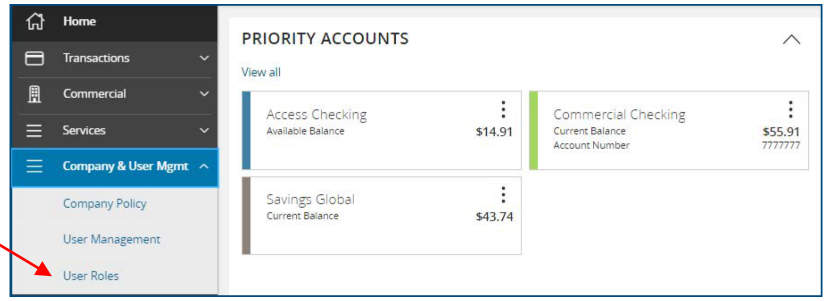
Camden NATIONAL BANK | TreasuryLink

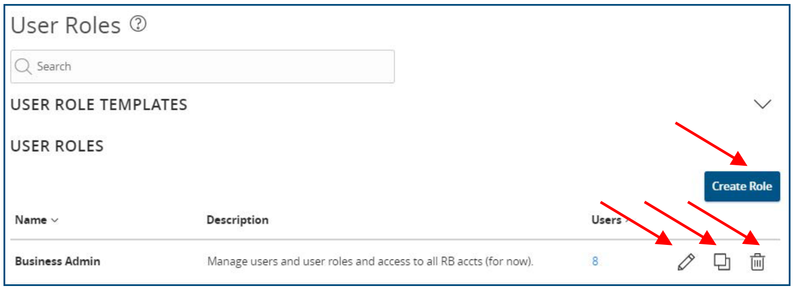
User Roles

NOTE: Each User Role controls feature entitlements and dollar limits for one or more company users with like roles and needs to be assigned to each user.

1. Select ‘Company & User Mgmt’ and then select ‘User Roles’.



2. Select ‘Create Role’ to create a new user role. Or use an available Template.



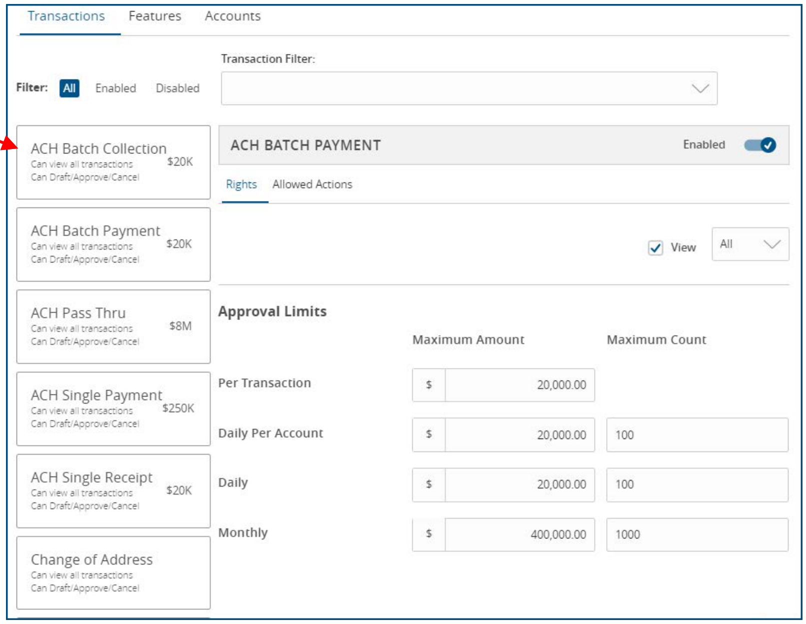
NOTE: Three actions can be performed on an existing user role.

a. Select the pencil icon to edit the user role.

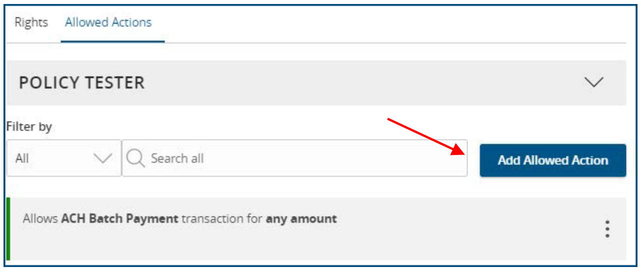
b. Select the double paper icon to copy the user role.

c. Select the trash bin to delete the user role.

3. Review each transaction by clicking on the card view and adjust Limits and add Allowed Actions as needed to further limit entitlements.



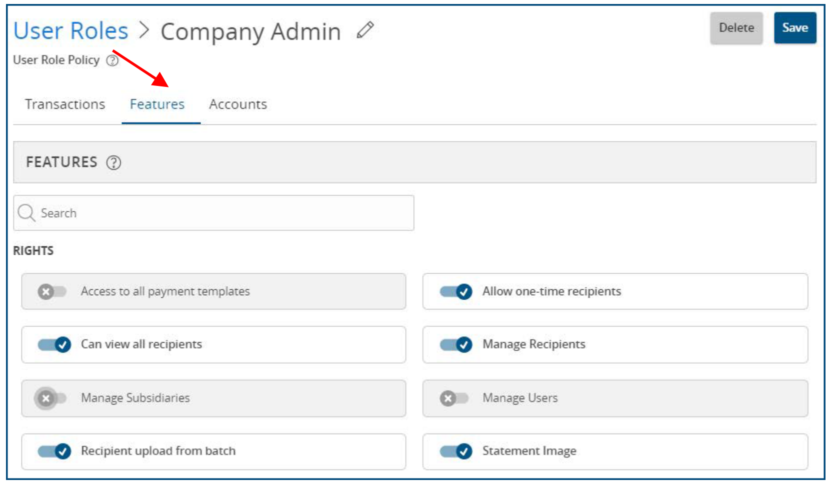
4. Expand the 'Policy Tester' to validate the User Role functionality. If the Policy Test fails, the reason will be designated on the screen.



Questions? We can help!
Phone: 866-265-9195
Email: TreasuryManagement@CamdenNational.com

Features

5. Select the ‘Features’ tab to view and modify the non-transactional features. Select features to enable or disable.



Accounts

6. Select the ‘Accounts’ tab to view and modify the account entitlements by selecting ✓ or ⊘ under ‘View’, Deposit’ or ‘Withdraw’.

7. Repeat steps 4-12 for each transaction type.

8. Save the User Role by selecting the ‘Save’ button.

NOTE: ‘Show unassigned accounts’ allows the user to view accounts without any view, deposit or withdrawal access.