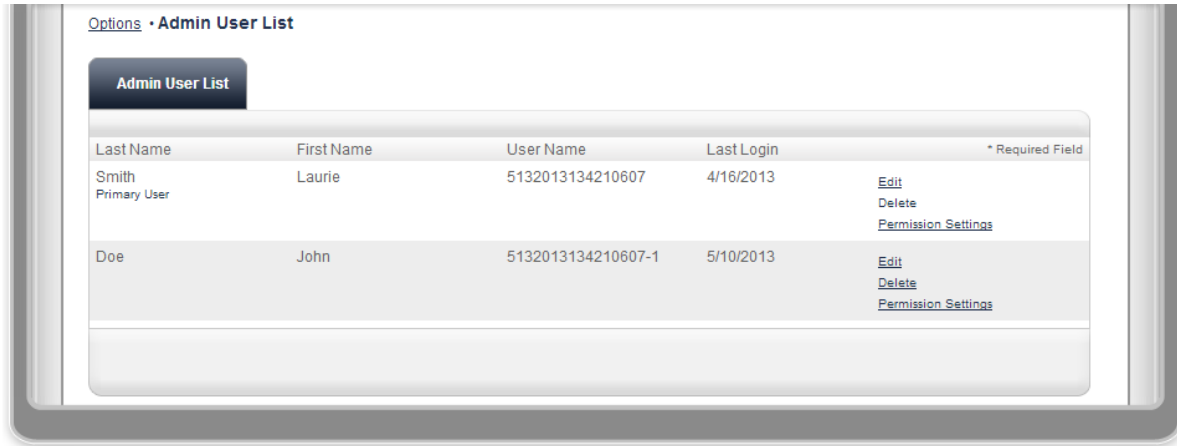


How to Delegate Payment Tasks

Go to the “Options” tab.

Select “Manage Users.”

From there, you will see your Admin User List.



Choose the user you want to delegate payments to and select “Permission Settings.”

This allows you to view the current permission settings for this user and to edit these settings.

Edit Permissions Menu—Payments

- Schedule Bill Payments
 - Allow the user to schedule payments to any payee or to specific payees that you choose.
- Schedule Email Payments
 - Allow the user to schedule payments to all email payees or to specific email payees that you choose.
- Establish Payment Caps
 - Set specific payment caps for each payee, or set a payment cap that applies to all payees. The user will not be able to exceed this cap when scheduling payments.
- Choose Payment Accounts
 - Determine which accounts the user can make payments from.

View

User Information

Edit Permissions

Payments

Payees

Options


Message Center

Approve Authority

Edit Payment Permissions

User Name: Frank Winslow

User Type: Custom



Schedule Bill Payments

Schedule to all Bill Payees
 Schedule to specific Bill Payees

<input type="checkbox"/> Jenny Jones	<input type="checkbox"/> Bob Smith
<input type="checkbox"/> Retirement Account	<input type="checkbox"/> Chase
<input type="checkbox"/> AT&T	<input type="checkbox"/> Moe's Mowers
<input type="checkbox"/> Waverly Water Co.	<input type="checkbox"/> Vern's Fertilizer
<input type="checkbox"/> Seed Indeed Co.	<input type="checkbox"/> Cellular One
<input type="checkbox"/> Lease	<input type="checkbox"/> Kim Stone
<input type="checkbox"/> American Express	<input type="checkbox"/> MasterCard

Schedule Email Payments

Schedule to all Email Payees
 Schedule to specific Email Payees

Establish Payment Caps

Payment caps allow you to set a specific amount that Frank Winslow cannot exceed when scheduling payments to particular payees.

Payee Payment Cap \$

Payment Cap to all Bill Payees
 Payment Caps to specific Bill Payees

Payee Name	Payee Payment Cap Amount

Tax Payments

Designate Pay from Accounts

Select **“Approve Authority”** in the **Edit Permissions** menu to indicate that you want to approve transactions.