



Mobile Business Manage Users Edit a Role

Edit a role by changing the user permissions.

Business Manage Users - Edit a Role Step-by-Step

Use the following steps to edit a role.

Step	Action
1	Tap Menu at the bottom right of the screen.
2	Tap the Manage Users drop-down arrow.
3	Tap the Roles hyperlink.
4	Tap the arrow next to the Role to edit.
5	Optional: Tap the Delete (🗑️) icon in the upper right of the screen to delete the role.
6	Optional: Tap the Apply All Permissions Below checkbox if the role is granted unlimited access and permissions.
7	Scroll down to tap the All Accounts drop-down arrow to view all accounts.
8	Optional: Scroll down to tap the Select All checkbox to allow access to all accounts.
9	Scroll down and tap the checkbox next to the account(s) to grant access.
10	Scroll down and select the Permission(s) to assign to the role by tapping the checkbox(es) next to each option.
11	Scroll down to tap the Transfer To and From drop down arrow to select External Account access.
12	Scroll down to tap the checkbox next to the External Account Permissions to grant permissions.
13	Scroll down to enter an amount in the Limit per credit field.
14	Scroll down to enter an amount in the Limit per debit field.
15	Scroll down to tap Transfer "To" drop down arrow to view a list of available accounts.
16	Optional: Scroll down to tap the Select All checkbox to grant access to all accounts.
17	Scroll down and tap the checkbox next to the account(s) to have access.
18	Scroll down to tap Transfer "From" drop down arrow view a list of available accounts.
19	Optional: Scroll down to tap the Select All checkbox to grant access to all accounts.
20	Scroll down to tap the checkbox next to the account(s) to grant access.
21	Scroll to tap the checkbox next to the Manage Users Access options assigned to the role.
22	Scroll to tap the checkbox next to the Manage Roles Access options assigned to the role.
23	Optional: Tap the Delete Role hyperlink at the bottom right of the screen to delete the role
24	Optional: Tap the Cancel button to cancel editing the role.
25	Tap the Save button to save the edits.