



How to Create New User

- 1. Under the "Entitlements Management" section, click on Create a New User.
- 2. Under "Add Email" type in user's email address in the "Email" field and click on Continue.
- **3.** Complete the "Enter User Details" section with the user's information and click **Continue**.
- 4. Under the "Select User Type", select **Yes** or **No** as to whether the user will be an Administrator then click on **Continue**.

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Enti	tlements	Manager	nent			1
					Generate Entitlements F	Report Create New U
reate N	lew User	3		Enter User Details	3	
eate User	Assign Entitlemen	nts Review	Setup Complet	Now, add some details. Enter	full legal name and best primar ntacted.	ry
1 Add E	Email 2			First Name	Middle Name (Optional)	Last Name
Let's start t	by adding an email address.					
Email (?)				Preferred Name (Optional)		
		Г	Cancel Continue			Cancel Continue
	Select Liser	Type 4				
0	Select User	Type 4				
Lets	s start with de	fining the typ	e of user you'll	be setting up. This	will allow	
for a	certain permis	sions or limit	ts to be enabled	d.		
Will	this user be an	Administrator	?			
\bigcirc	No			Yes		
\bigcirc	This user will o	only be able to	access	This user will ha	ve the ability to	
	accounts and them.	functions assi	gned to	manage access for users.	levels and approva	als

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- 5. Under "Assign Entitlements", complete each of the following sections, "Accounts and Reporting", "Payments and Transfers" and "Relationship Management".
- 6. In the "Accounts and Reporting" section choose Select all accounts or Choose my accounts (leave Add/Manage Investments blank).
 - **a.** If **Choose my accounts** is selected, click on the desired account tabs from the pop-up box.
 - b. Click Apply Selections.

Accounts this user will be associated with and what level of access have.	they will
User Details	
Accounts and Reporting	Close
Assign permissions to the user to view the Accounts and Reports ta assigned permissions to add/manage investments (Time Deposits) Viewer Provides access to Accounts and Reporting tab in the portal	ıb. The user can also be
Choose Accounts ?	
 Select all accounts Choose my accounts 0 of 8 accounts selected 	
Select all accounts Choose my accounts O of 8 accounts selected Add/Manage Investments Provides access to add and manage Time Deposit products within the Accounts tab in the portal.	
Select all accounts Choose my accounts O of 8 accounts selected Add/Manage Investments Provides access to add and manage Time Deposit products within the Accounts tab in the portal. Assign Accounts	X

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- 7. In the "Payments and Transfers" section, complete all three sub sections: "Viewer", "Creator" and "Approver".
- 8. In the "Viewer" section, click the Viewer box to allow access to the "Payments Tab" where all initiated payments and book transfers may be viewed.
 - a. Next, choose Select all accounts, Select same as Accounts and Reporting or Choose my accounts.
 - **b.** If "Choose my accounts" is selected, click on the desired account tabs from the popup box and then click **Apply Selections**.
- 9. In the "Creator" section, click the **Creator** box to provide the user with access to initiate wire payments and book transfers.
 - a. Next, choose Select all accounts, Select same as Accounts and Reporting or Choose my accounts.
 - **b.** If "Choose my accounts" is selected, click on the desired account tabs from the popup box and click **Apply Selections**.
- **10.** In Approver, click Approver box to provide access to approve wire payments.
 - a. Next, choose one of the following "Select all accounts", "Select same as Accounts and Reporting" or "Choose my accounts".
 - **b.** If "Choose my accounts" is selected, click on the desired account tabs from the popup box and click **Apply Selections**.
 - c. Set transaction limits for the user, with the Max (per day) field being optional.
- 11. Once all sub sections are complete, click Apply Selections.

Payments and Transfers Close Assign permissions to the user to view the Payments tab. The user can also be assigned permission to create and/or approve wires and book transfers. 8 Viewer Provides access to Payments tabs to view all initiated payments and book transfers for selected accounts. Choose Accounts (?) 8b Select all accounts Select same as Accounts and Reporting Choose my accounts 0 of 8 accounts selected Creator Provides access to initiate wire payments and book transfers from selected accounts. Initiated book transfers will not require approval **9**a Choose Accounts (?) Select all accounts Select same as Accounts and Reporti Choose my accounts 0 of 8 accounts selected Approver (10)ApproverProvides access to approve wire payments Choose Accounts (? (10b Select all accounts Select same as Accounts and Reporting Choose my accounts 2 of 8 accounts selected Set Limits Maximum per day (Optional) Maximum per transaction Ś 0.00 USD S 0.00 USD Please enter a valid 'Max.(per transaction)' amount.

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- 12. In the Relationship Management section click **Core Onboarding** box to provide access to view entities, view/upload Docs, trigger signatures/approvals, add/manage accounts.
- 13. In the bottom right of screen click Review.

14. On Review and Submit Profile page, review all user information and entitlements given.

15. If changes are needed, click Edit at the top right of that section

16. Once all information and entitlements have been validated click **Submit**.



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