Capital Markets

RBC Clear™
Working Capital Solutions

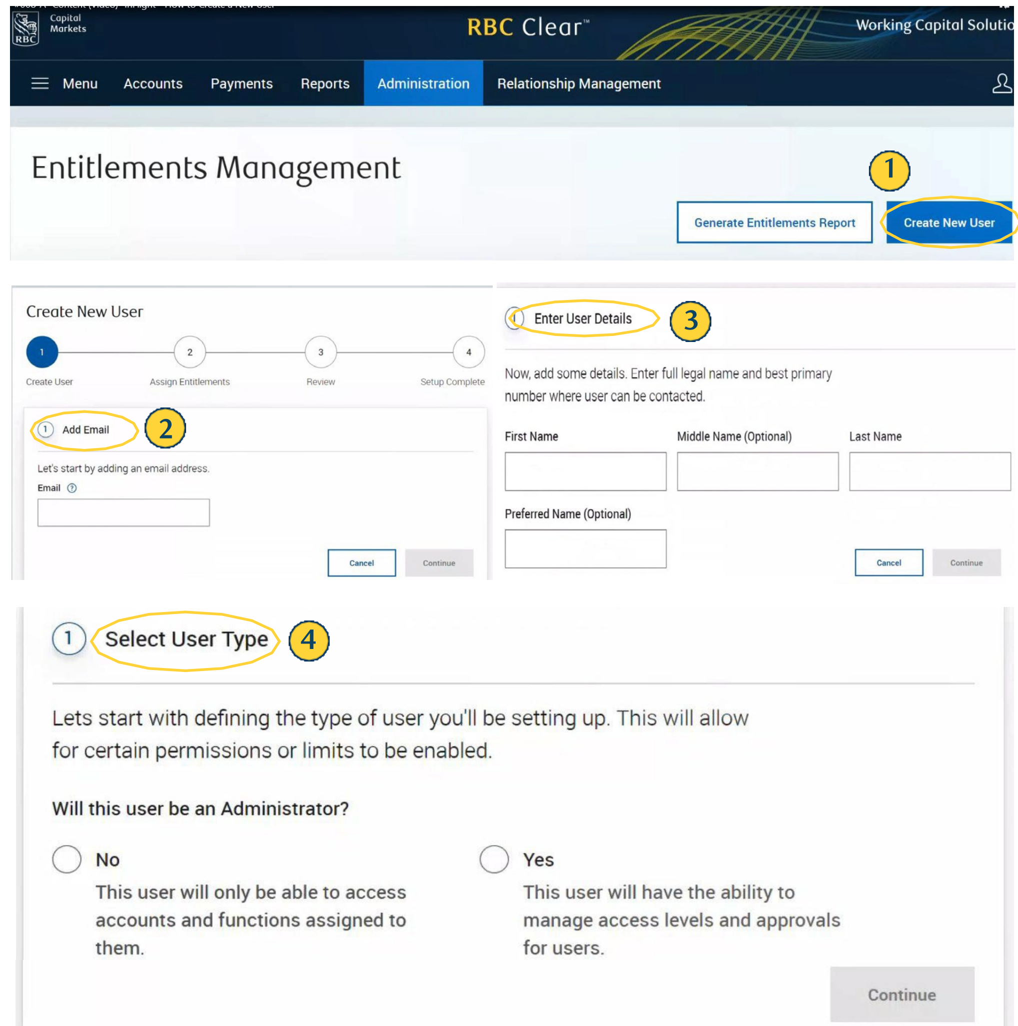
How to Create New User

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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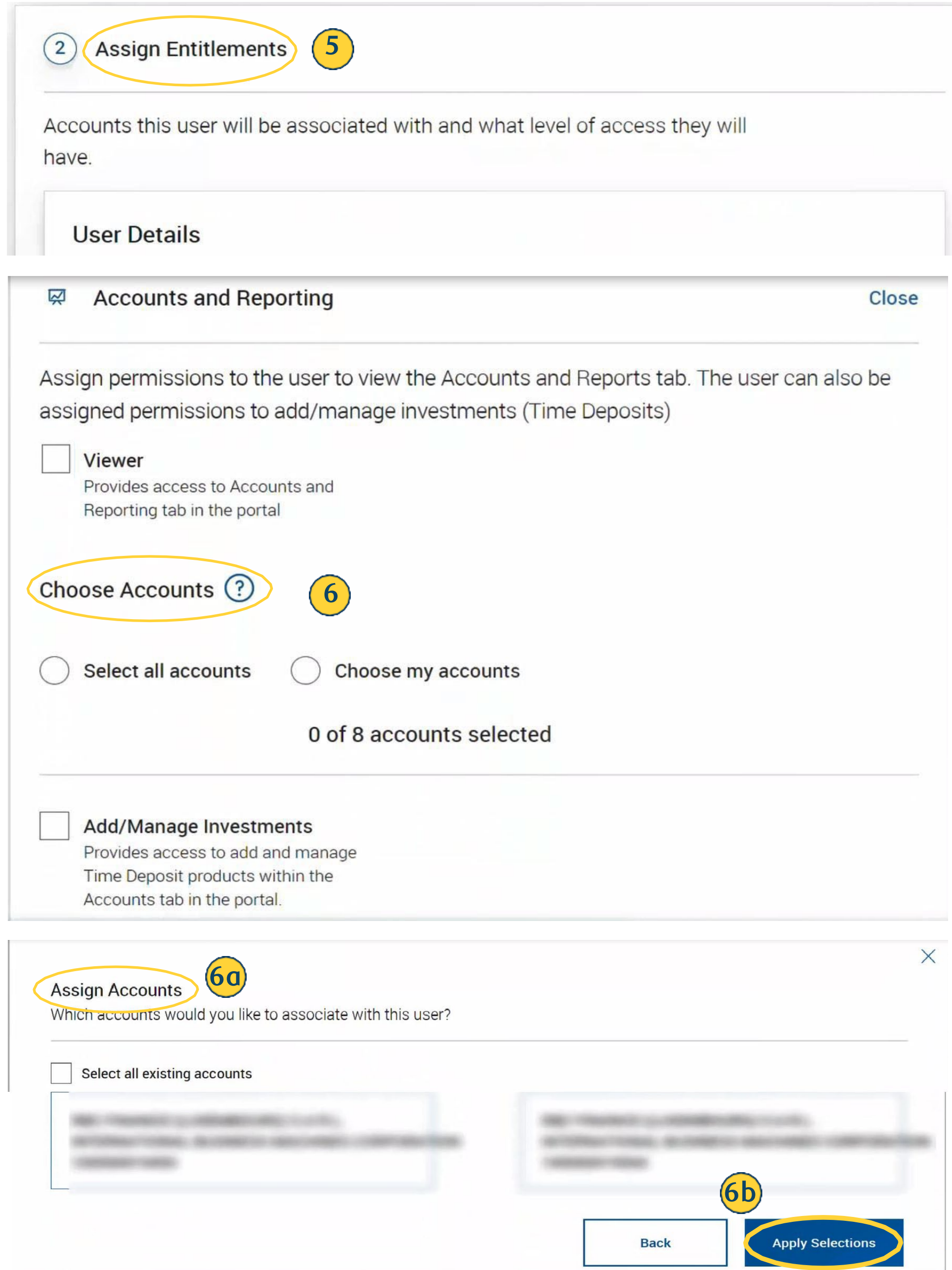
5. Under "Assign Entitlements", complete each of the following sections, "Accounts and Reporting", "Payments and Transfers"and "Relationship Management".

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.**



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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**.

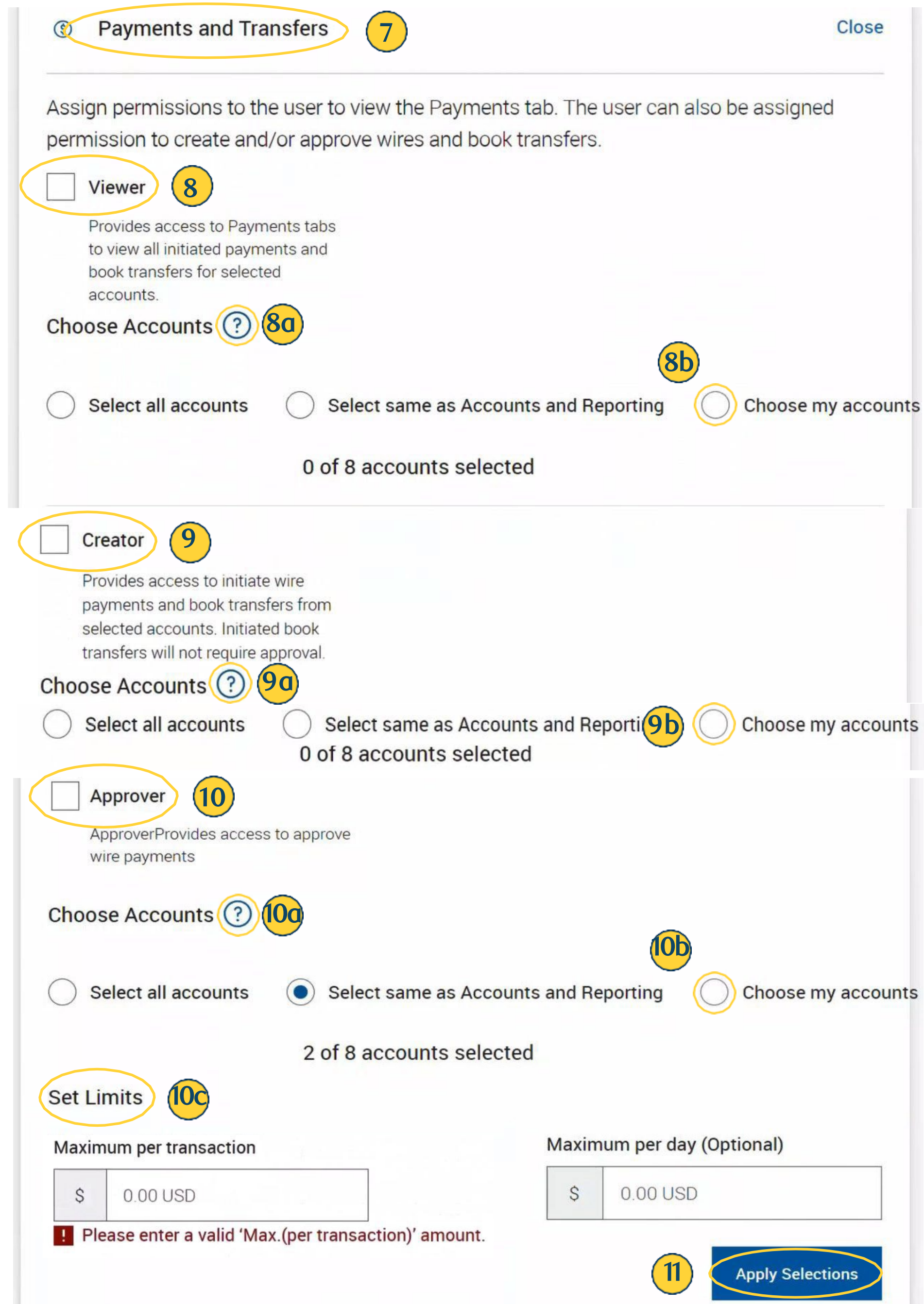
10. In Approver, click Approver box to provide access to approve wire payments.

   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**.

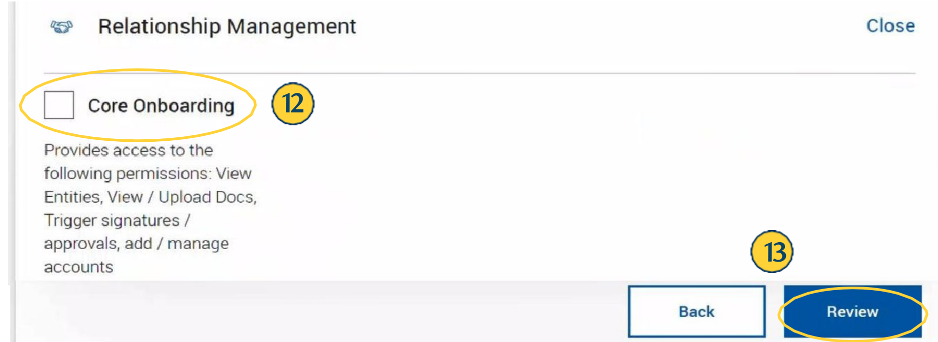
   c. Set transaction limits for the user, with the Max (per day) field being optional.

11. Once all sub sections are complete, click **Apply Selections**.

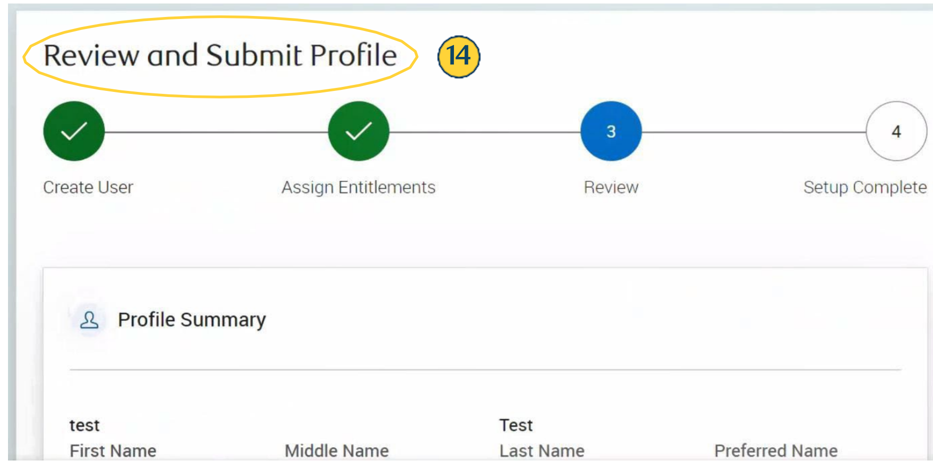


12. In the Relationship Management section click **Core Onboarding** box to provide access to view entities, view/upload Docs, trigger signatures/approvals, add/manage accounts.

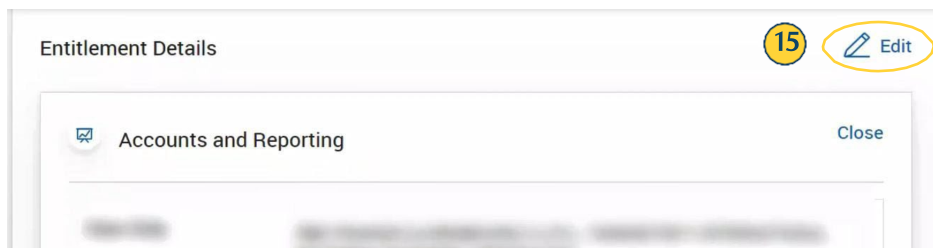
13. In the bottom right of screen click **Review**.



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**.