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WEB ESCROW ADMINISTRATOR GUIDE

Equal Opportunity Lender
Equal Housing Lender
Member FDIC

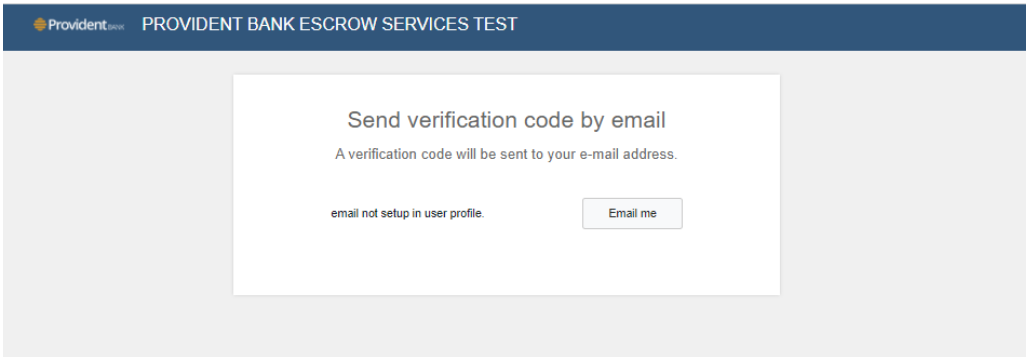
Table of Contents

Web Escrow Administrator Guide

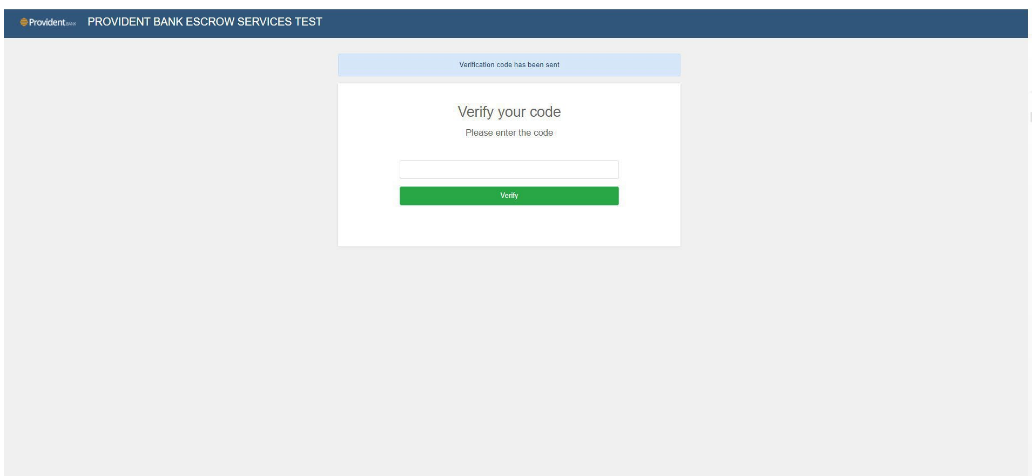
Sign In

Enter your Username and Password, then click the **Login** button. The *Send verification code by email* window appears.

1. Select **Email Me**



2. Check your email account for a verification passcode when the *Verify your code* window appears.
3. Enter the verification code in the **Enter your code** field.
4. Select **Verify**.



After signing in, the user will be taken to one of the following screens:

- If the user has multiple Master accounts, they will be taken to the *Select Master Account* screen.
- If the user only has one Master account, they will be taken to the *Master Account Summary* screen.

Expired Password

The *Change Your Password* window appears if the user's current password is expired or if the password was changed by an administrator.

1. Enter the old password in the **Current Password** field.
2. Enter the new password in the **New Password** and **Confirm New Password** fields.
3. Select **Change** to process the password change.

NOTE

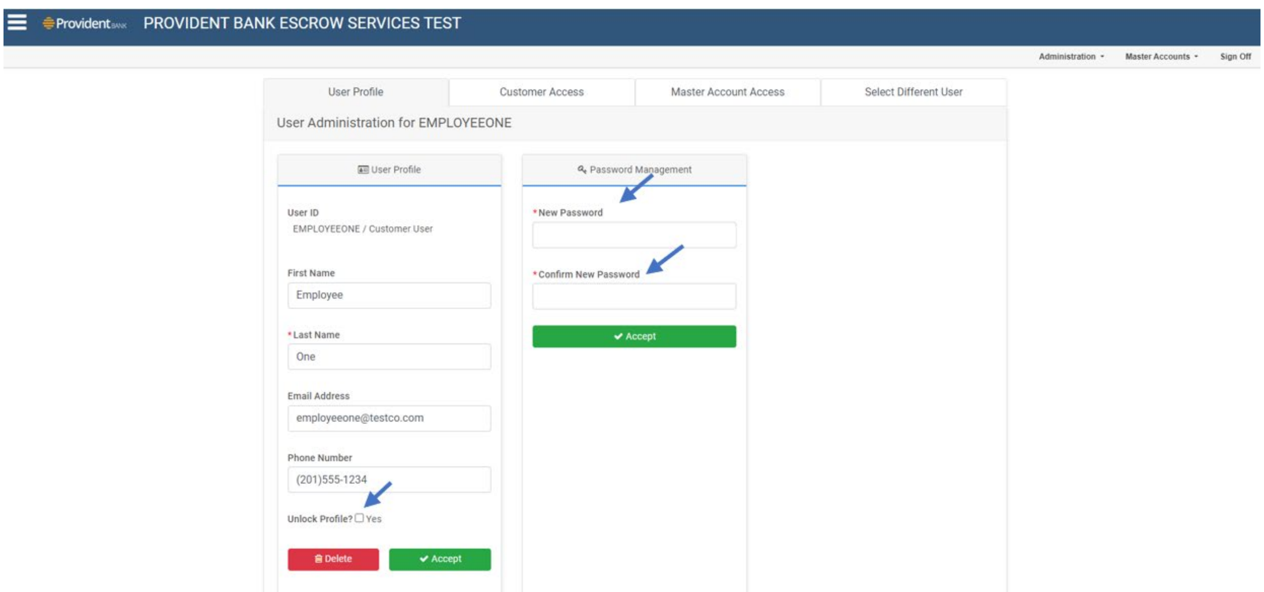
Password must have at least 10 characters Password must contain at least 1 letter Password must contain at least 1 number Password must contain at least 1 capital letter
Password must contain at least 1 special character
Password must not be the same as the last 5 that you have used

Resetting a Locked User

A user may be locked if they fail the login too many times. As an administrator, select the *Yes* check box next to **Unlock Profile?** and select **Accept.** This will allow the customer to login with their existing password.

NOTE

If the user has forgotten their password, the administrator can also change the password and provide the new password to the user. Remember to select **Accept** to apply changes. The user will be required to change their password when logging in.



System Offline

This panel appears if the Web Escrow system is not available. This would typically occur during early morning hours.

Administration Drop-Down Menu

Edit My User Profile - Change Password

The Change Password panel allows the user to change their password.

1. Enter the current password.
2. Enter the new password in the New Password field, and then re-enter the new password in the Confirm New Password field.
3. Select Accept.

4. Sign in again using the new password after the change has been accepted.

Edit My Profile - Change Contact ID

The Change Contact Info section allows the user to enter or change an email address, phone number, and first or last name.

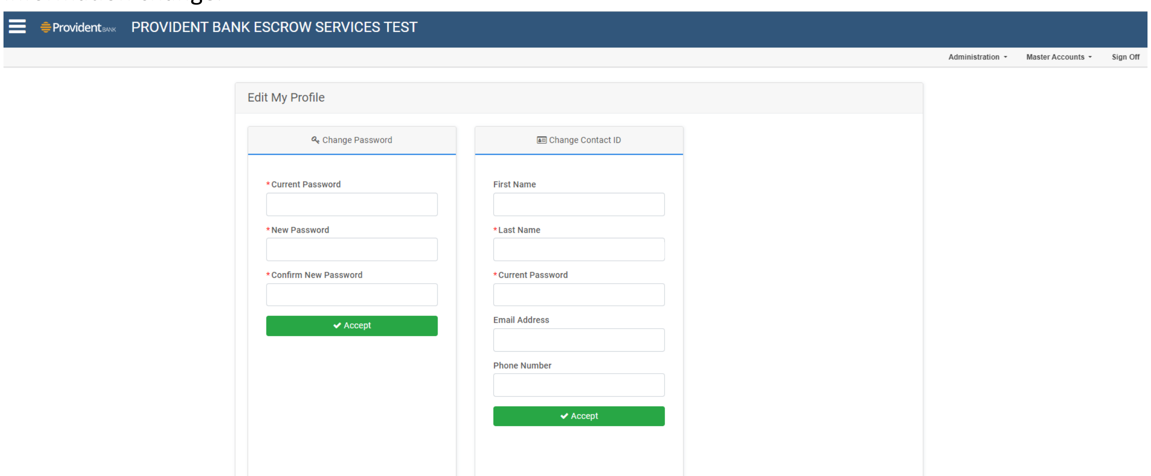
NOTE

User email addresses and phone numbers are required as the financial institution has chosen a Multi - Factor Authentication option.

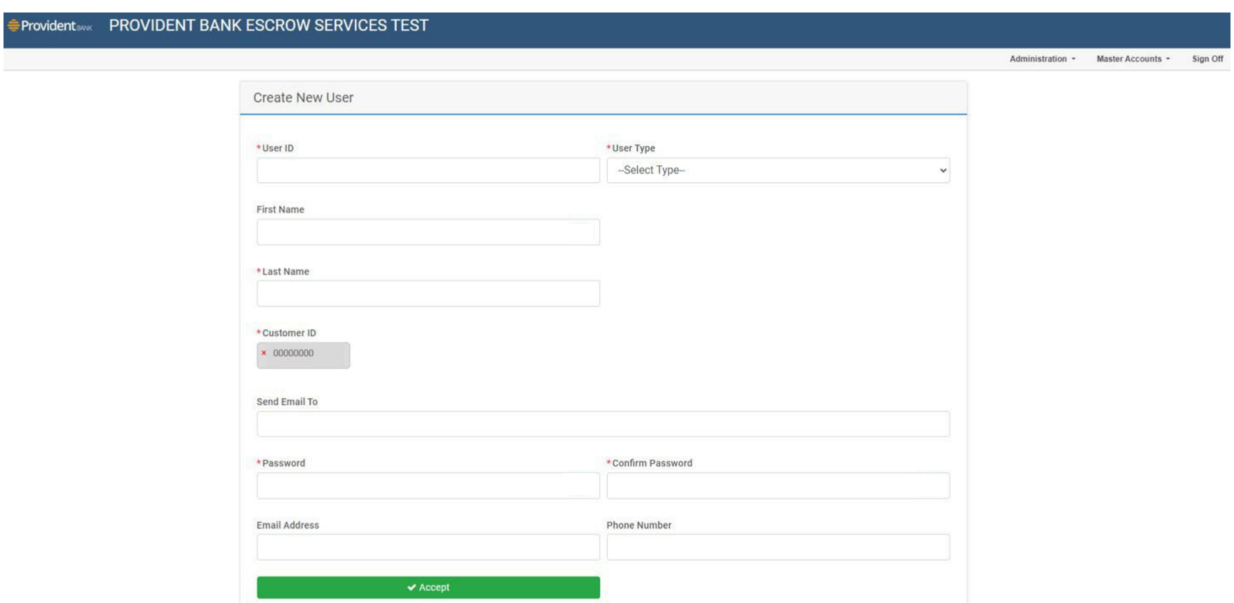
1. Enter user information into the appropriate fields.
2. Enter the current password and last name in the Current Password and Last Name fields.

NOTE

The current password and last name are required to make changes. Select Accept to process the contact information change.



Create New User



Customer Administrator

Bank users and customer administrators are the only user types that can create customer administrators. Customer administrators are assigned a customer ID and have access to all master accounts with the matching customer ID.

These fields are available on the Create New User screen. Required fields have a red asterisk to the left of the field name:

User ID
Enter a unique login ID for the customer administrator. The value can contain up to 40 alphanumeric characters.

First Name
Enter the customer administrator's first name. The value can contain up to 40 alphanumeric characters.

Last Name
Enter the customer administrator's last name. The value can contain up to 40 alphanumeric characters.

User Type
Select *Customer Administrator* from the drop-down menu.

Customer ID
Select the Customer ID that this user should have access to. The customer administrator has access to every master account with a matching customer ID.

Password
Enter a temporary password.

Confirm Password
Re-enter the temporary password.

Email Address
Enter the customer administrator's email address. This should be treated as a required field since email is used for login authentication.

Phone Number
Optionally enter the customer administrator's phone number.

Select **Accept** to create the customer administrator profile.

Customer User

Only bank users and customer administrators have permissions to create customer users. Customer users are assigned a customer ID and only have access to master accounts with a matching customer ID. Customer users can also be limited regarding the activity they may perform for a master account.

These fields are available on the Create New User screen. Required fields have a red asterisk to the left of the field name:

User ID
Enter a unique login ID for the customer user. The value can contain up to 40 alphanumeric characters.

First Name
Enter the customer user's first name. The value can contain up to 40 alphanumeric characters.

Last Name
Enter the customer user's last name. The value can contain up to 40 alphanumeric characters.

User Type
Select *Customer User* from the drop-down menu.

Customer ID
Select the Customer ID that this user should have access to. Access to the master accounts for this Customer ID is granted on the *Master Account Access* panel.

Password
Enter a temporary password.

Confirm Password
Re-enter the temporary password.

Email Address

Enter the customer user's email address. This should be treated as a required field since email is used for login authentication.

Phone Number

Optionally enter the customer user's phone number.

Select **Accept** to create the customer user profile. Master account access will need to be added in order for this customer user to have permission to accounts. Reference the *Master Account Access* section under *User Information* in this guide for steps for adding user permissions.

User Administration

Select a User

Administrators have access to the **User Administration** function in the **Administration** menu and can open the **Select a User** panel.

Selecting one of the underlined user IDs opens the user's information in a new screen. All visible information associated to the user can be modified.

Customer Access

The *Customer Access* panel allows a user to assign or remove access to a **specific customer ID.**

Customer users are granted access to one or more customer IDs upon creation of the profile. When access is granted to a customer ID, the master accounts associated with that customer ID are available for assigning user permissions.

Add Customer ID

To add customer ID access for the user, enter the desired ID in the **Customer ID** field and select **Add**.

Remove Customer ID

To remove customer ID access for the user, select the **Delete** check box for the customer ID that you want to remove, and then select **Delete**.

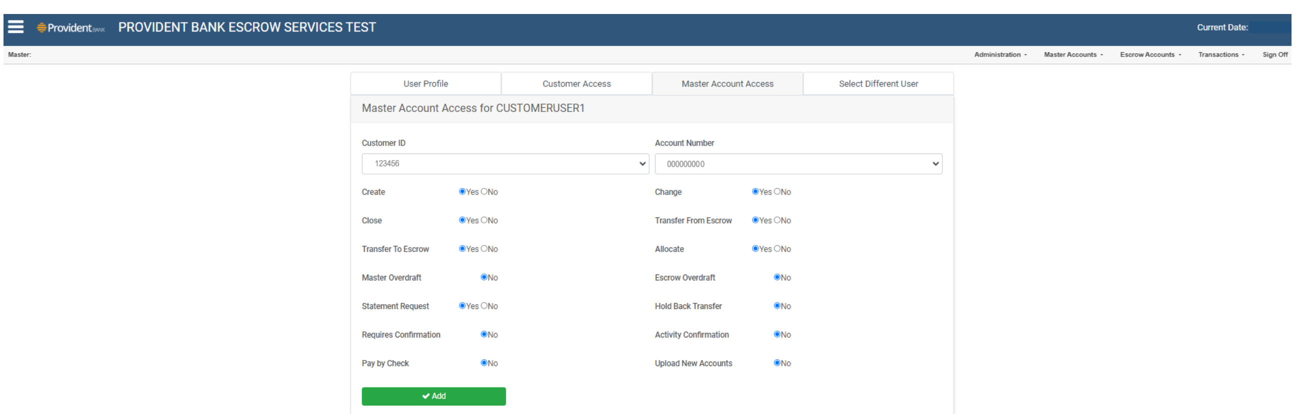
Note: Removing access to a customer ID removes access to all master accounts associated to the ID for the user.

Change Customer ID Rows

To change the number of customer IDs displayed at one time, enter the desired value in the **Page Size** field, and then select **Accept Page Size**.

Master Account Access

This panel is only displayed for Customer User types. Customer Administrator access is set by the bank. Customer users must be granted access to master accounts and given escrow account activity permissions for each master account. The *Master Account Access* panel allows the user to select the master account and activity permissions for each escrow account.

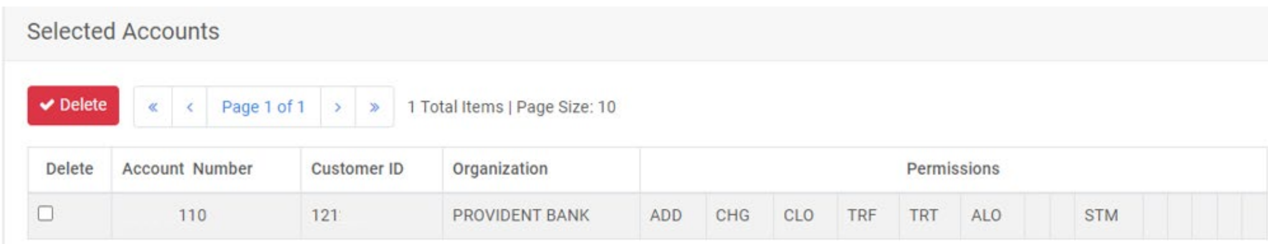


Add Master Account Access

1. Select the customer ID from the drop--down menu. The **Account Number** drop-down menu lists all master accounts for the relevant customer ID.
2. Select **All Accounts** or a particular master account, and then select *Yes* or *No* to determine whether the customer user can perform the activity. If there are no selections next to an activity, the master account is not permitted to perform the activity.
3. Select **Add** to grant access for that master account to the customer user. All master accounts for which the customer user has been granted access appears along with the escrow account activity that is permissible.

Remove Master Account Access

To remove master account access, select the check box next to the account number in the delete column, and then select **Delete**.



NOTE

<u>**Acronyms**</u>

ADD=Create

CHG=Change

CLO=Close

TRF=Transfer from Escrow

TRT=Transfer to Escrow

ALO=Allocate

STM=Statement Request

View Administrator Activity

The *View Administrator Activity* panel allows administrators to review activity performed by other users with administrative permissions.

Admin Guide

The *Admin Guide* contains the instructions defined by the bank for administrators.