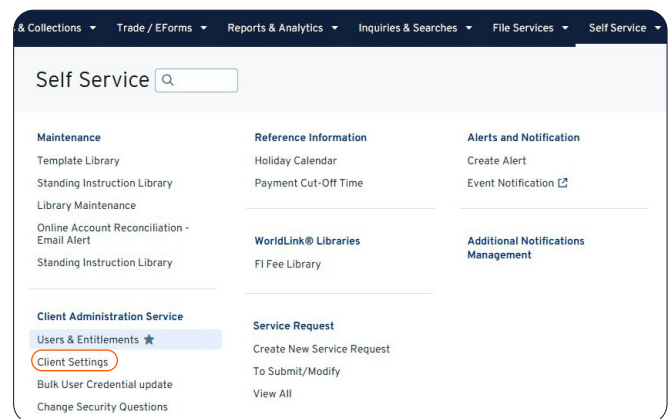


CitiDirect How to change a payment flow – a transaction authorization level

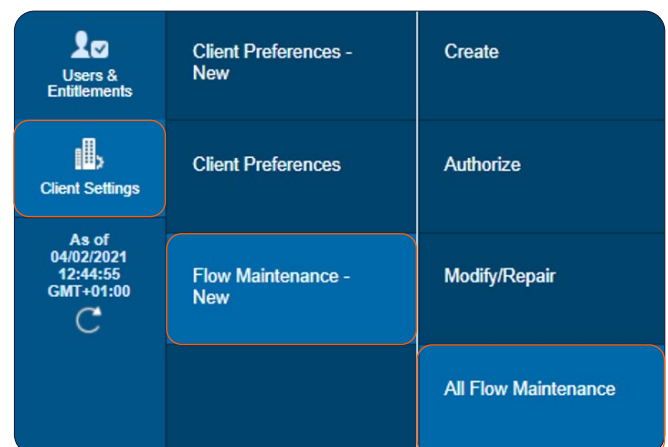
Introduction

Security Manager is entitled to change a payment authorization flow. For every company, the flow is set as assigned to specified 2- persons. One person creates a payment and next, another person authorizes it. However, the flow can be modified. This can be done in the main Self Service module.

1. In the main Menu, select the tab **Self Service**.
2. Now select the option **Client Settings**.



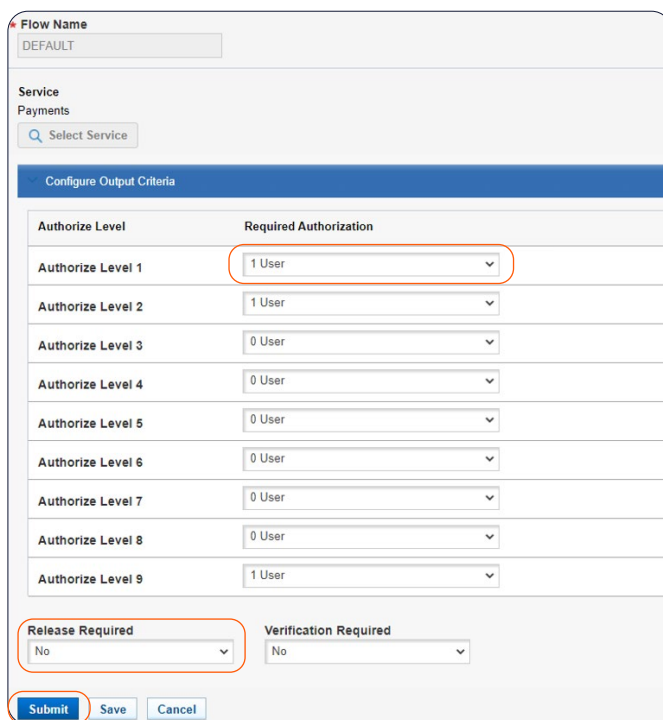
3. Click on the tile **Client Settings** and go smoothly through the option **Flow Maintenance – New** to the 3rd column and the tab **All Flow Maintenance**.



4. Select the service for which you want to modify the flow. For a flow for payments, select **Payments**. Click on the word **DEFAULT** next to it.

All Flow Maintenance (26)		
Show Search Criteria		
All (1 - 26 of 26)		
Flow Name 2 ▲	Service 1 ▲	Worklist Status
DEFAULT	Flow Maintenance	Processed
DEFAULT	Import Transactions	Processed
DEFAULT	Libraries	Processed
DEFAULT	Messages	Processed
DEFAULT	Mobile & Tablet User Management	Processed
DEFAULT	Payment Insights	Processed
DEFAULT	Payments	Processed
DEFAULT	Purchase FX for Payments	Processed

5. The system will take you to the window where the level of authorization and the number of users who are to provide authorization are selected.
6. Having selected the appropriate level of authorization and number of authorizations, click on [Submit](#).
7. The option [Release required](#) is a type of the next stage of verification after authorization. This is not payment authorization. A payment will be waiting for sending in the tab [To Release](#). A payment can be sent by the person who has authorized it. A different approach applies to authorization. Each authorization must be made by a different user.
8. After you have set your preferred levels, click on [Submit](#). The flow for payments will be re- directed to authorization.



Flow Name: DEFAULT

Service: Payments

Select Service

Configure Output Criteria

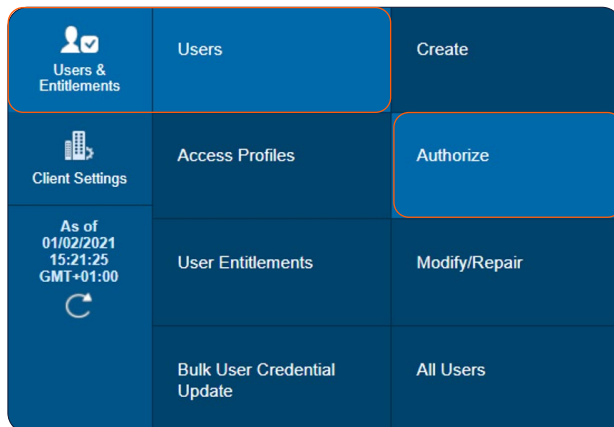
Authorize Level	Required Authorization
Authorize Level 1	1 User
Authorize Level 2	1 User
Authorize Level 3	0 User
Authorize Level 4	0 User
Authorize Level 5	0 User
Authorize Level 6	0 User
Authorize Level 7	0 User
Authorize Level 8	0 User
Authorize Level 9	1 User

Release Required: No

Verification Required: No

Submit Save Cancel

9. Authorization will be carried out in a standard manner: the other Security Manager will find the new flow to be authorized in the tab [Authorization](#).



Users & Entitlements	Users	Create
Client Settings	Access Profiles	Authorize
As of 01/02/2021 15:21:25 GMT+01:00	User Entitlements	Modify/Repair
	Bulk User Credential Update	All Users

If you have any questions, please contact the CitiDirect Technical Support >>