FEBRUARY 2025

Digital Banking

ROBERTSON
BANKING COMPANY
EST. 1870

USER GUIDE

Learn how to use Digital Banking with this handy guide.

For questions contact us at **1-866-289-1033**

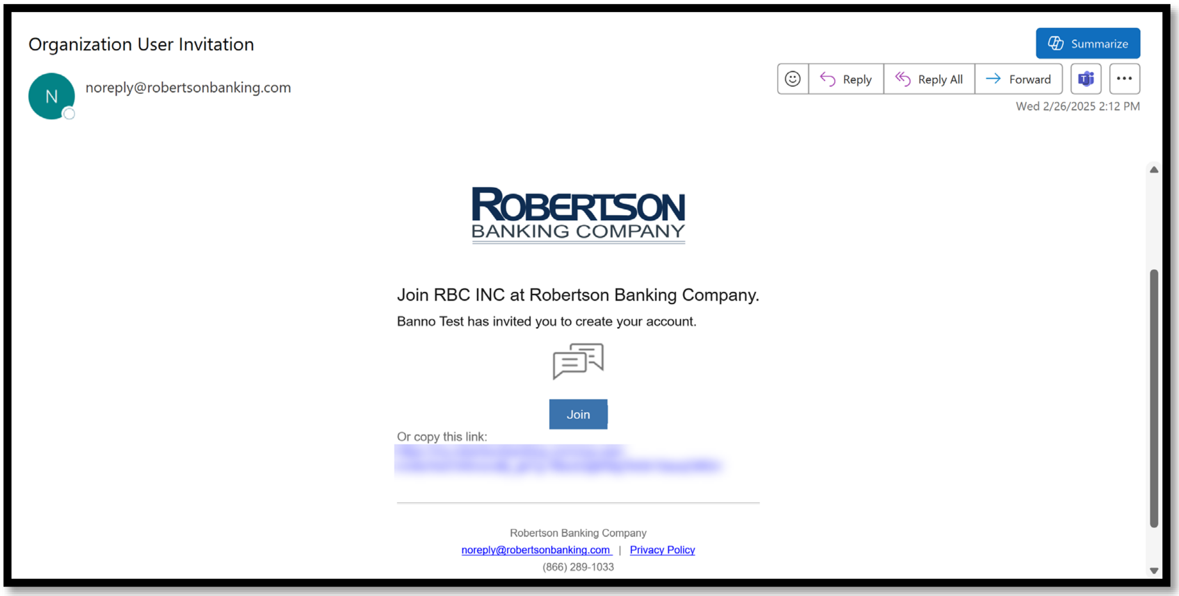
Table of Contents

Table of Contents

First Time Login

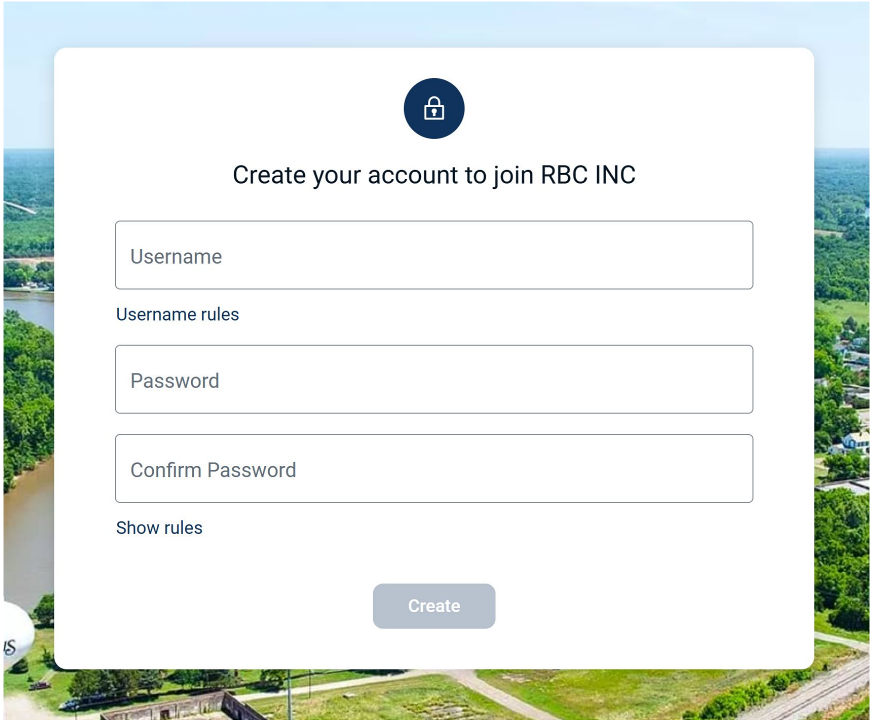
Step 1

Open your enrollment email and click **Join**.



Step 2

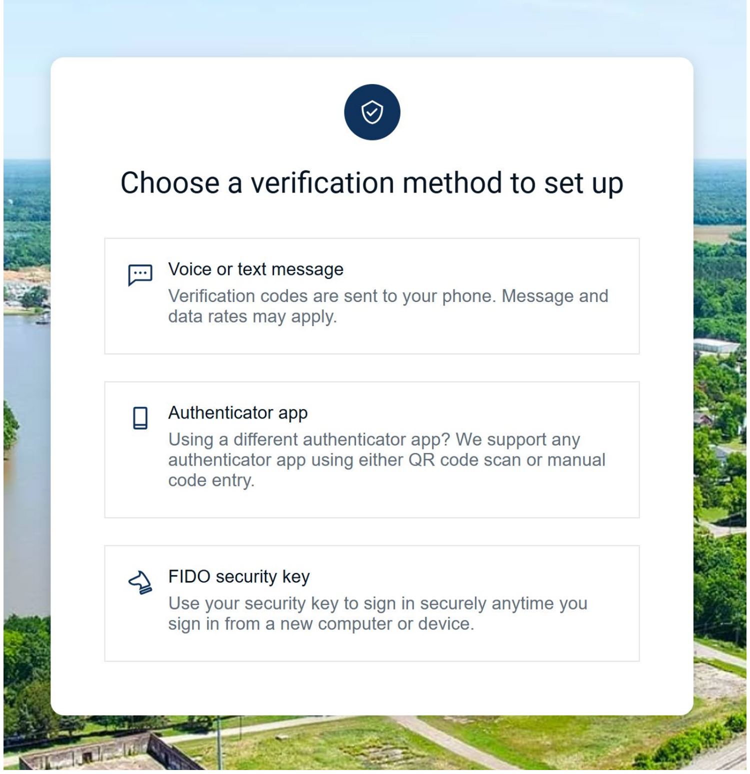
Create your **username** and **password**. Click **Create** and sign In.



Step 3

Review the information regarding registering for two-factor authentication and click **Get started**. Choose how to receive your two factor authentication codes:

- **Voice or text message:** Enter your phone number and choose to receive your code via text or phone call. Enter the code you receive.
- **Authenticator app:** Open your authenticator app and either scan the QR code or enter the code that appears manually. Enter the code that generates on your app.
- **FIDO security key:** Scan the QR code, insert, or tap your physical key to your device



Step 4

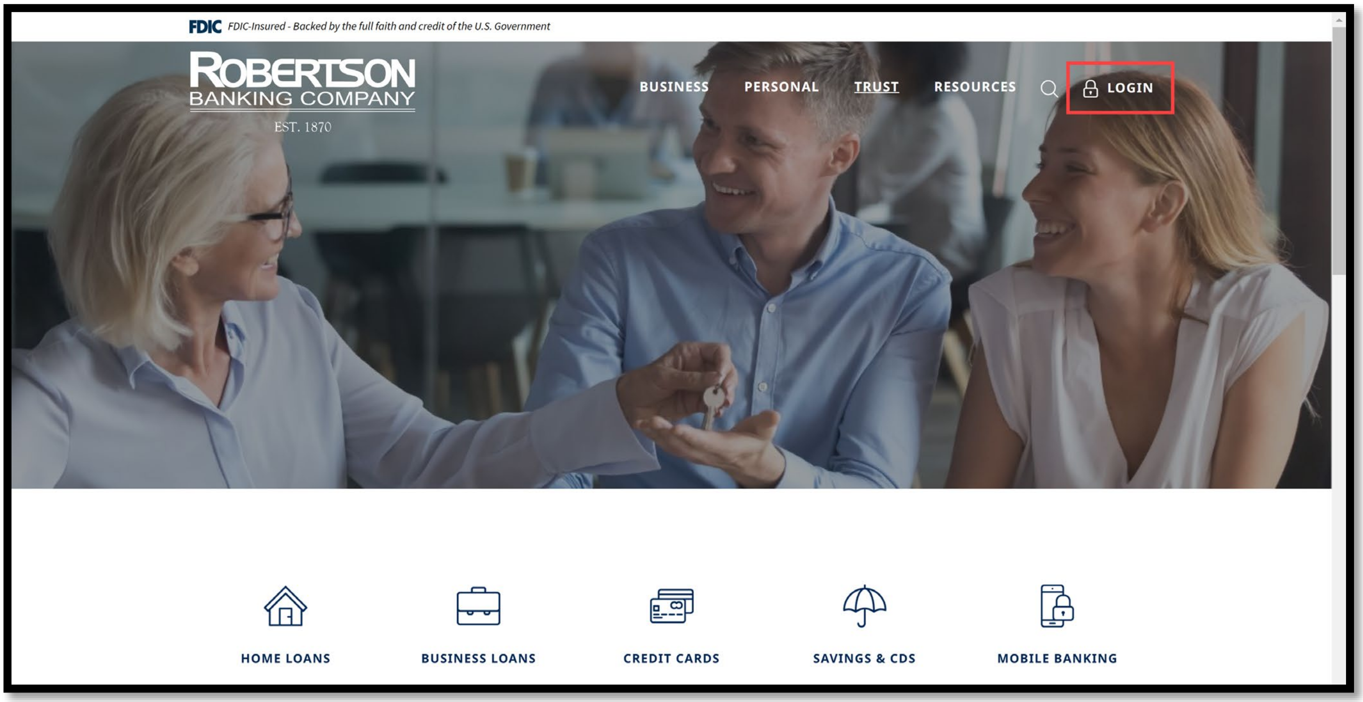
Click **Done** and accept the **Terms and Conditions**.

Account Recovery

Use these steps to reset your password and/or retrieve your username.

Step 1

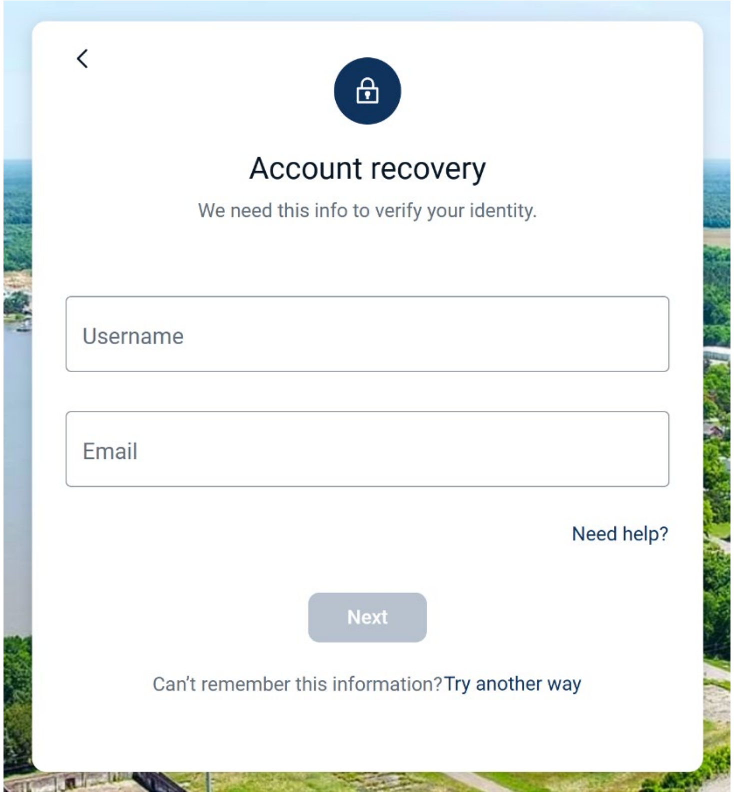
Navigate to our website and click **Login**. Select **Forgot Password**



Step 2

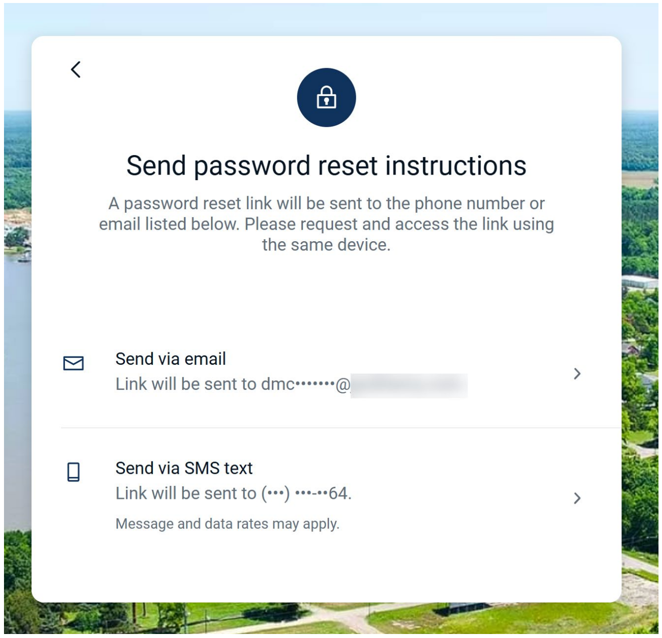
Enter your username and email address.
IMPORTANT: Email must match what is on file.

Don’t know your username or email address? Click **Try another way** to use your social security and account numbers instead.



Step 3

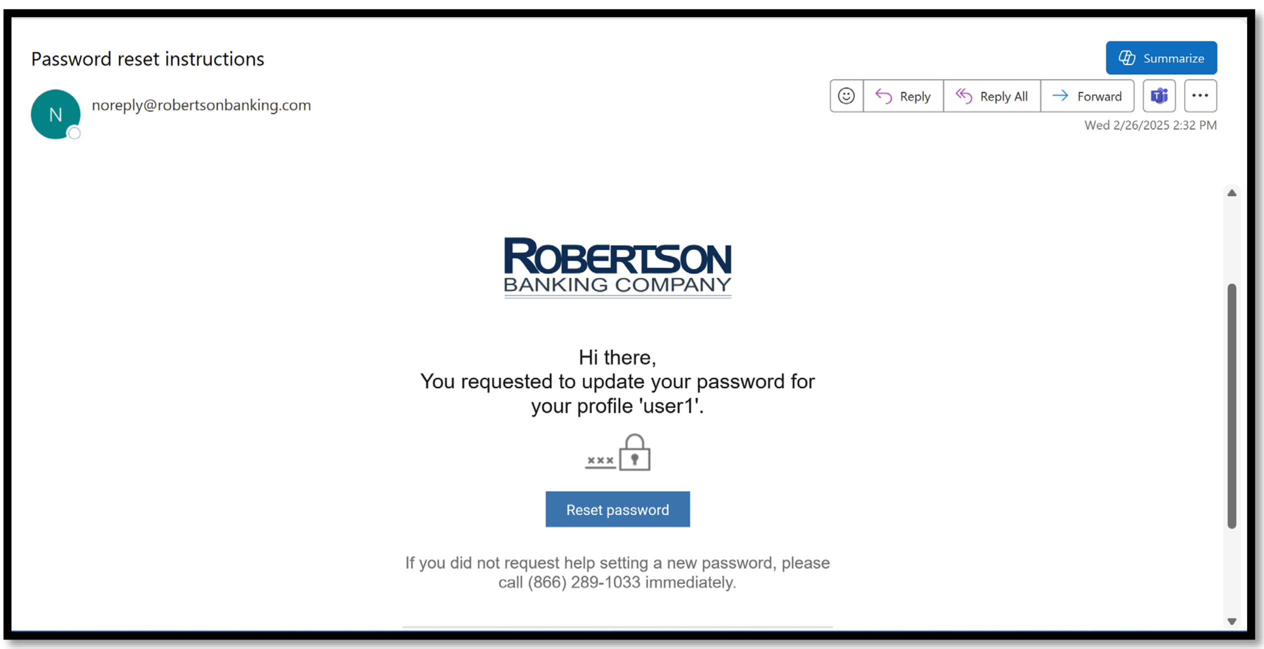
Choose to receive your instructions via email or text.



Step 4

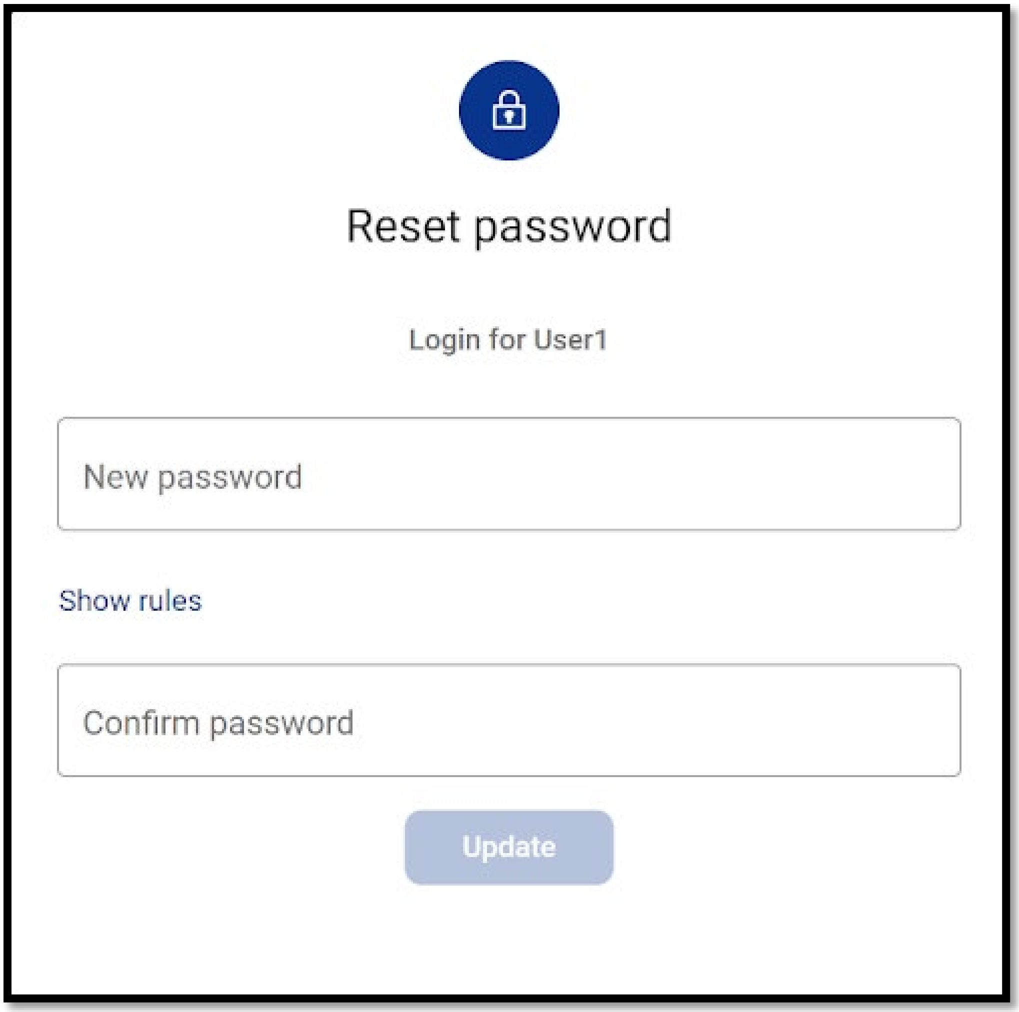
Email: Open your email. Your username will appear in the email body.
Click **Reset Password** if applicable.

Text: Open your text and click the link.



Step 5

Enter the code you receive and create a new password.

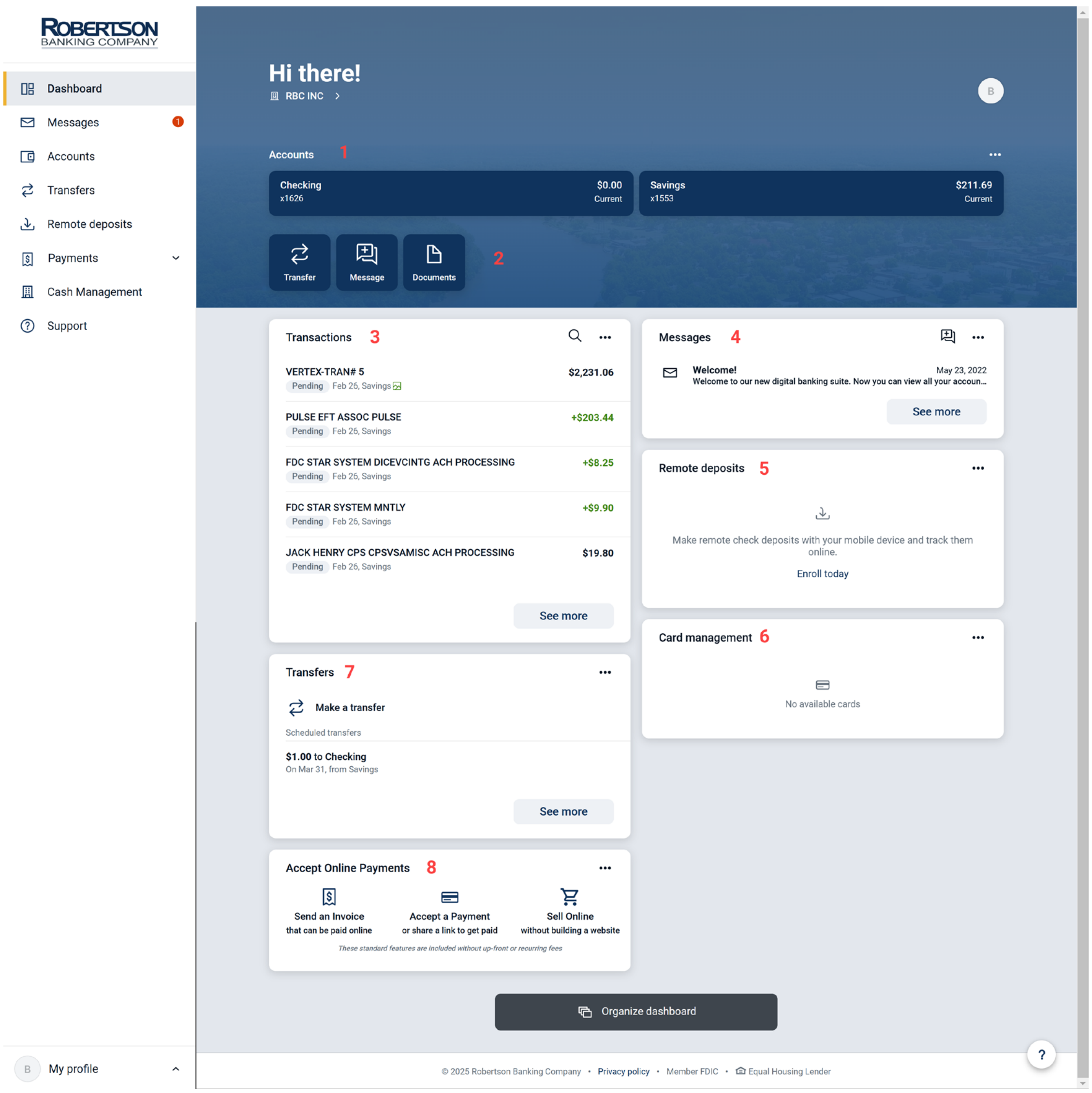


Dashboard

This is your landing page where you can access your accounts, review recent activity, and move money.

Layout

1. **Accounts -** Displays accounts including balance, status, and last four digits of account number.
2. **Quick Action Buttons -** Click a button to jump to that feature of online banking
3. **Transactions -** Displays recent activity on all accounts
4. **Messages -** Displays conversations between you and support representatives as well as alerts and bank messages.
5. **Remote deposits-** Enroll for and view recent mobile deposits
6. **Card Management -** Displays debit cards that are linked to your accounts. Select a card to toggle it on or off, report it lost or stolen, or reorder.
7. **Transfers -** Displays scheduled transfers and a quick link to Make a Transfer.
8. **Accept Online Payments-** Send an invoice, accept a payment, or sell online

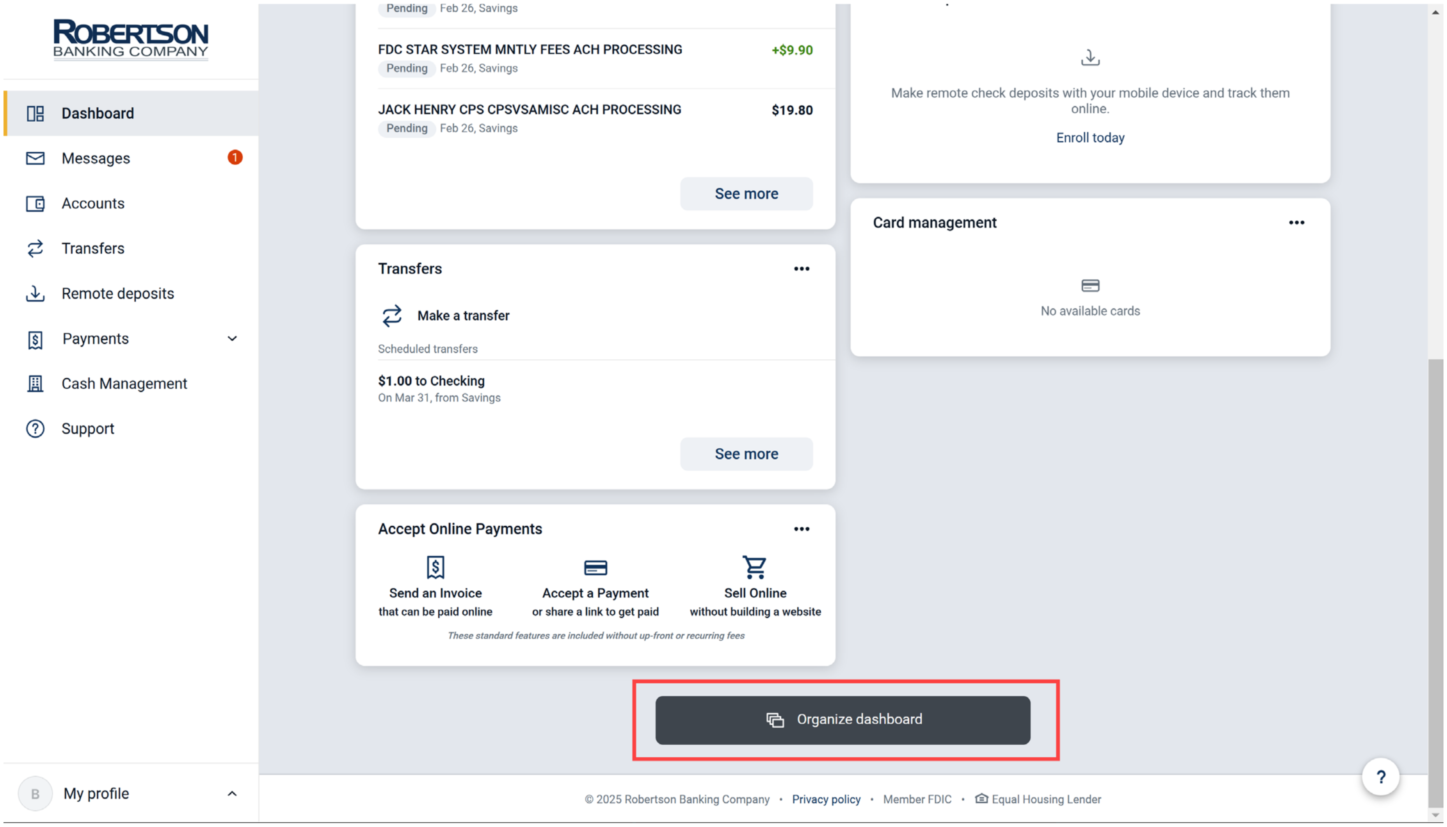


Organize Dashboard

Use this feature to **add**, **remove**, or **reorder** the cards on the dashboard.

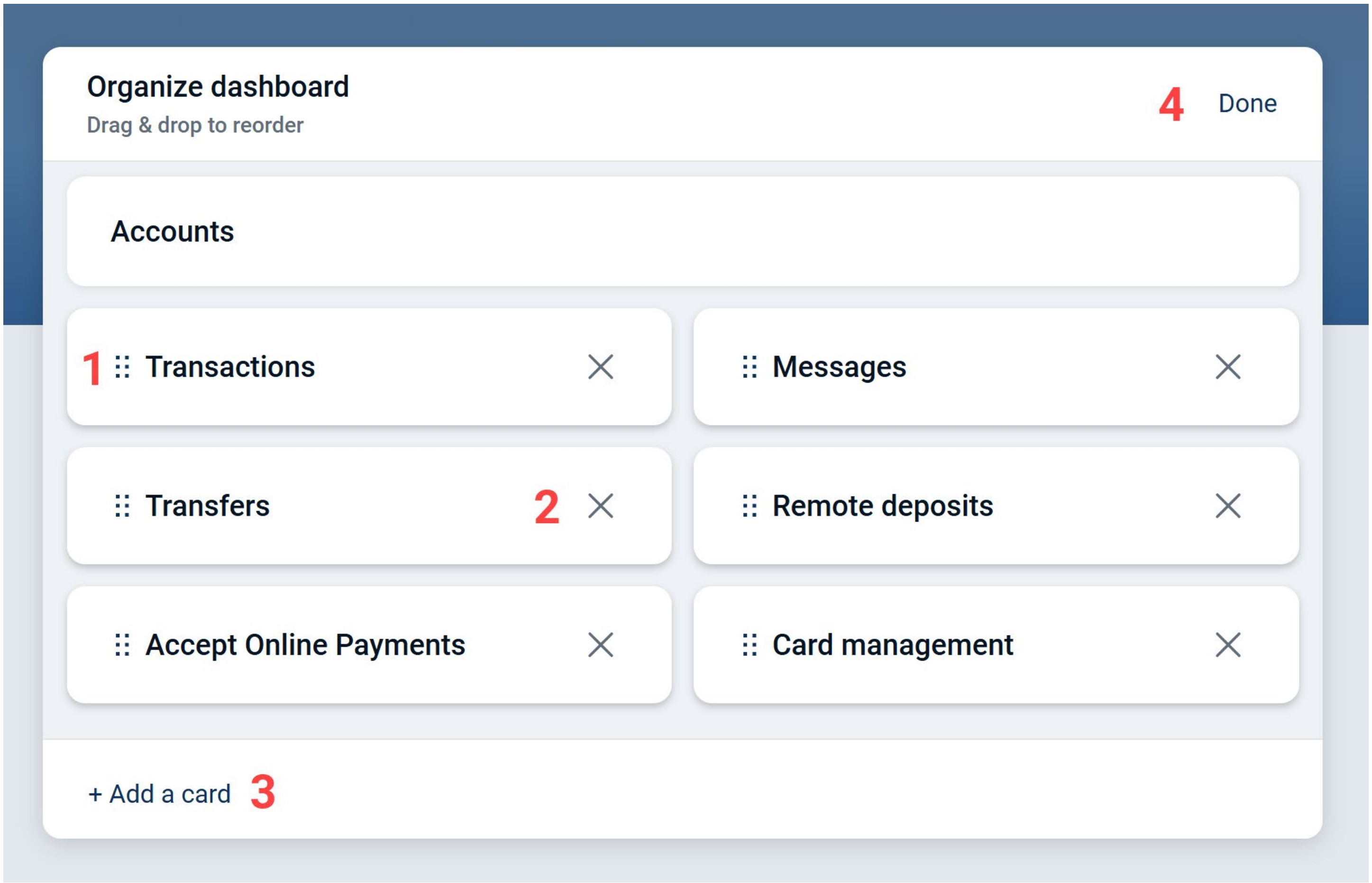
Step 1

Click **Organize Dashboard**.



Step 2

1. Click and hold the **6 dot icon** to drag and drop the cards to the order you prefer.
2. Click the **X** to remove a card from the dashboard.
3. Click **+ Add a card** to browse available cards that may be added to the Dashboard. Select any you'd like to appear and click **<** when finished.
4. Click **Done** once the layout suits your needs.

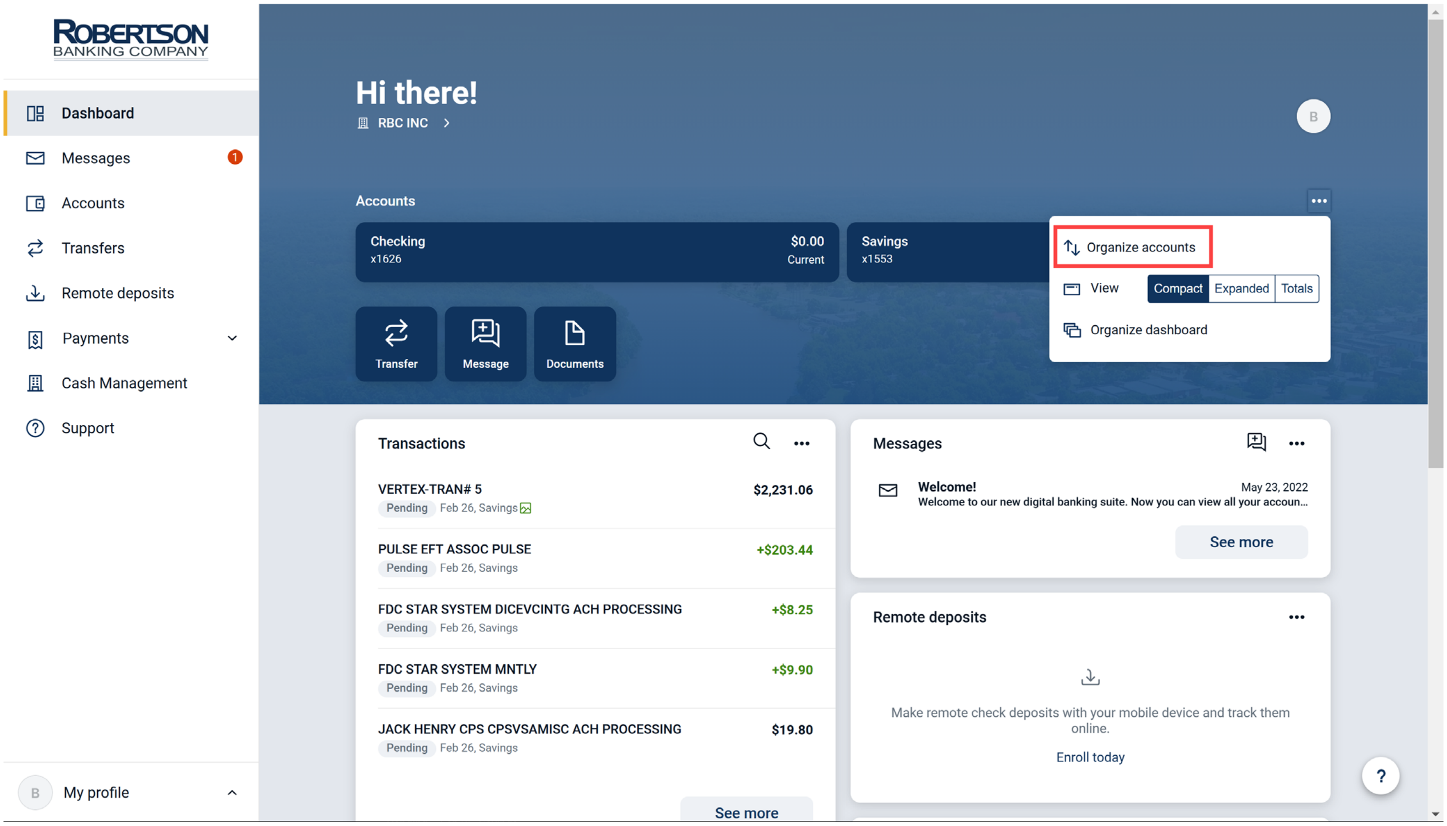


Organize Accounts

Use this feature to change the order of your accounts on the dashboard or update how the account information is displayed.

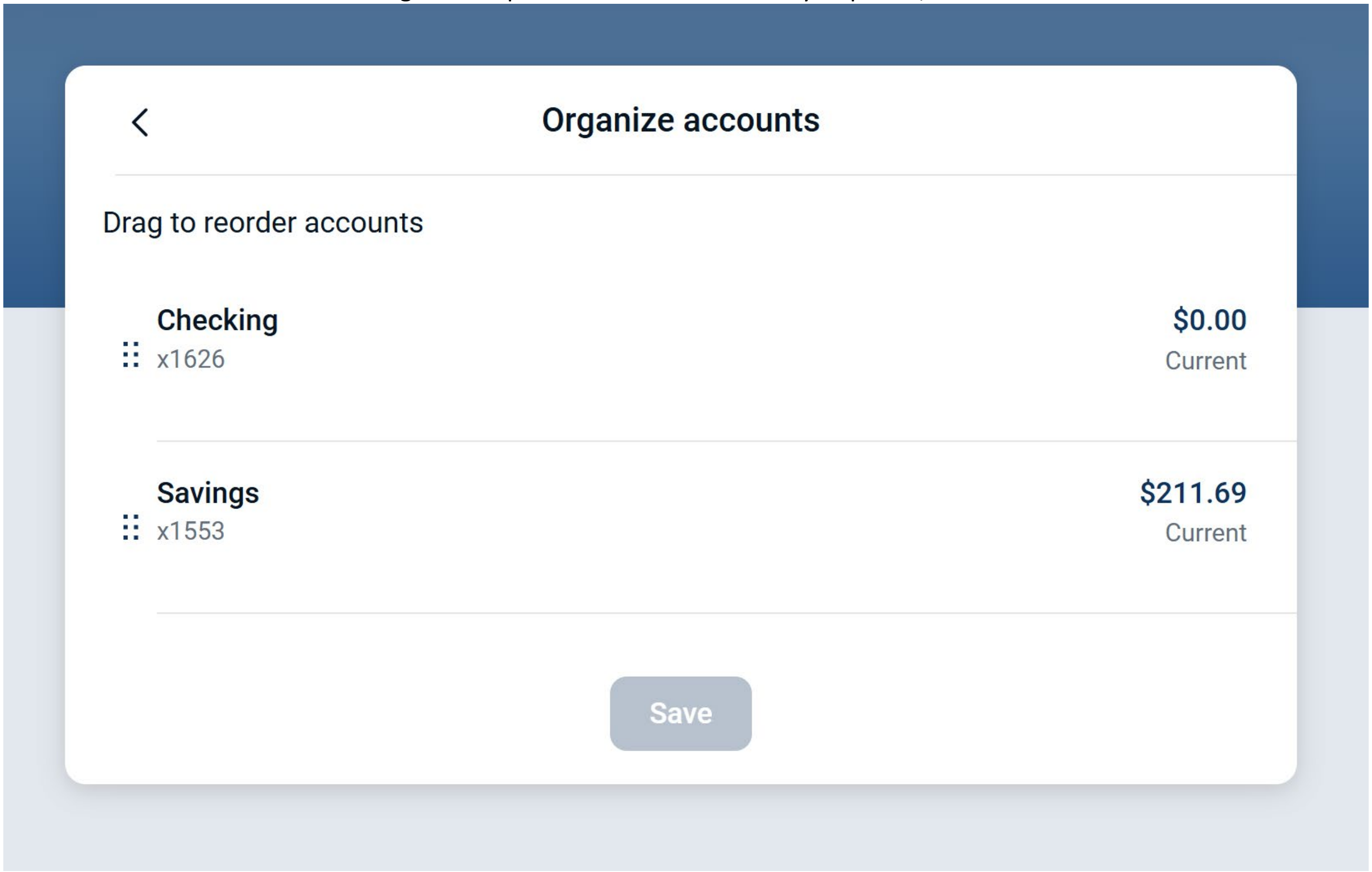
Step 1

Click the **ellipsis icon** next to the **Accounts** section, then select **Organize accounts**.



Step 2

Click and hold the **6 dot icon** to drag and drop an account to the order you prefer, then click **Save**.

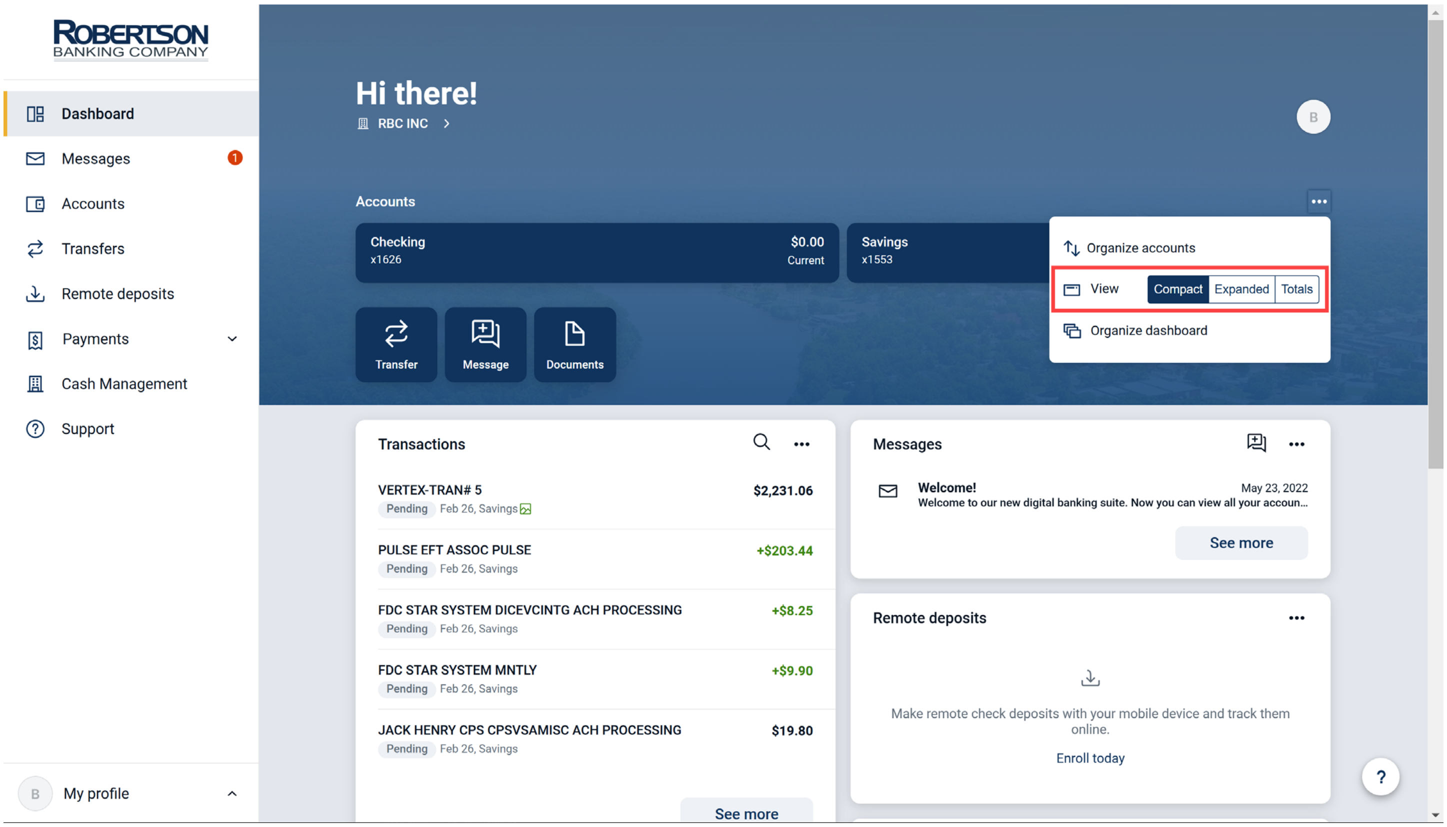


Account View

Use this feature to change what account information is displayed on the dashboard.

Click the ellipsis icon next to the **Accounts** section choose from one the **View** options:

- **Compact:** Displays accounts in a single row. Only three accounts will appear at a time.
- **Expanded:** Displays accounts in two rows. Up to six accounts will appear at a time.
- **Totals:** Groups accounts together based on type such as Cash, Borrowed, Credit Balance, and Investments. Displays the total balance for all accounts in each group.



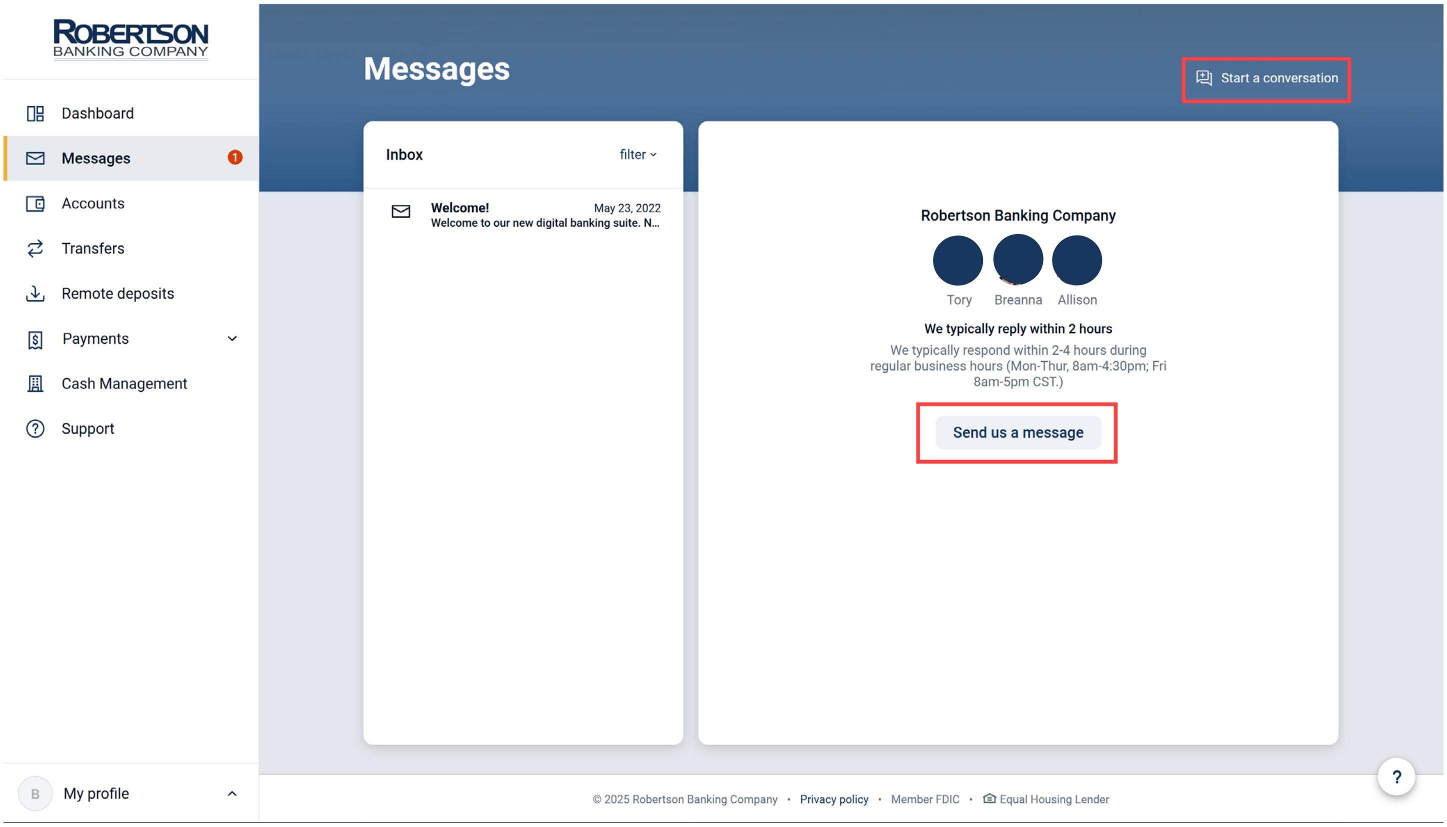
Messages

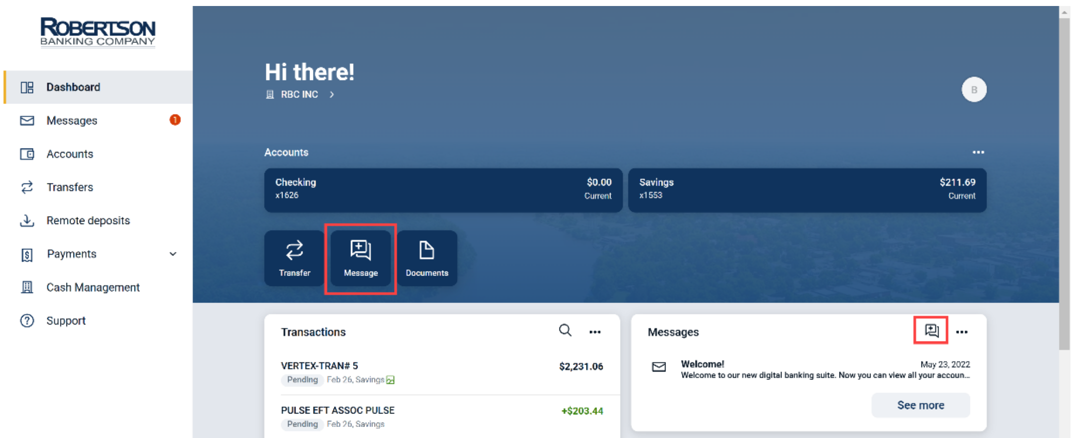
Use this module to start a conversation with the institution, review alerts, and access informational messages from the institution.

Start a Conversation

Step 1

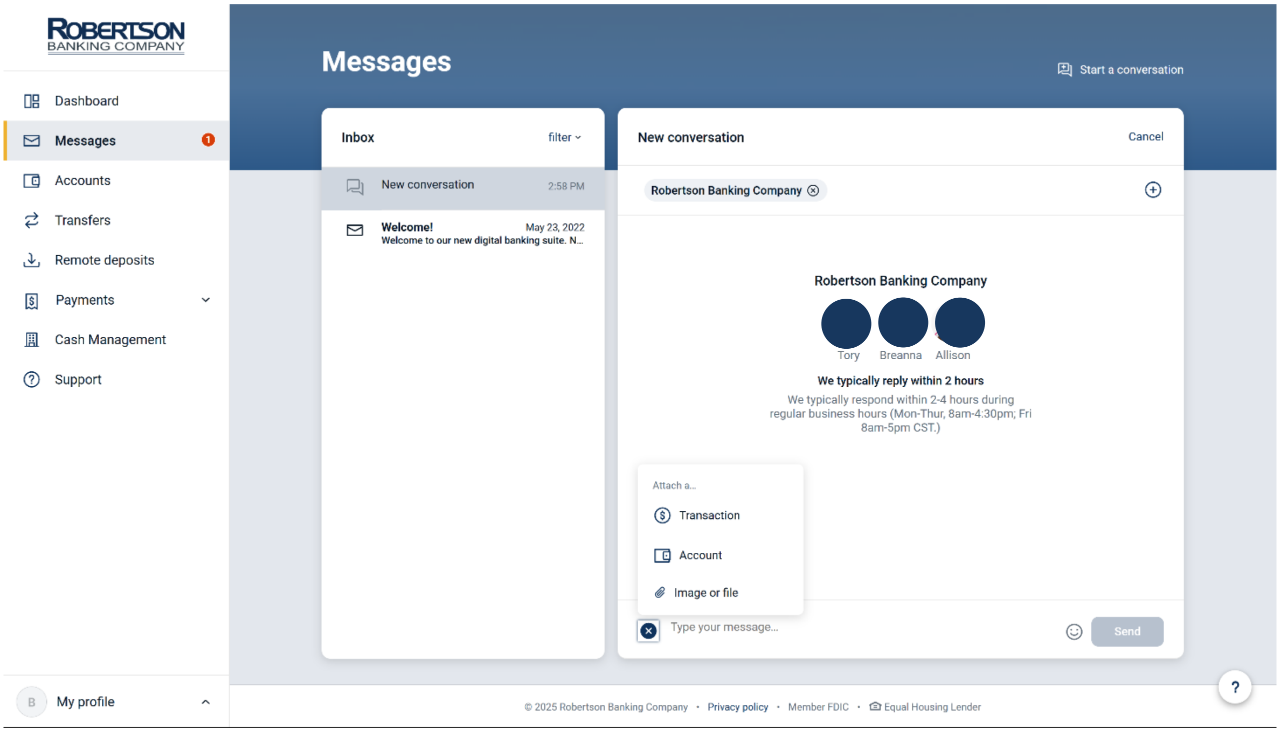
Select **Messages** from the navigation pane or navigate to the **Messages** card on the **Dashboard**. Click **Start a conversation**, **Send us a message**, or select the **New conversation** icon.





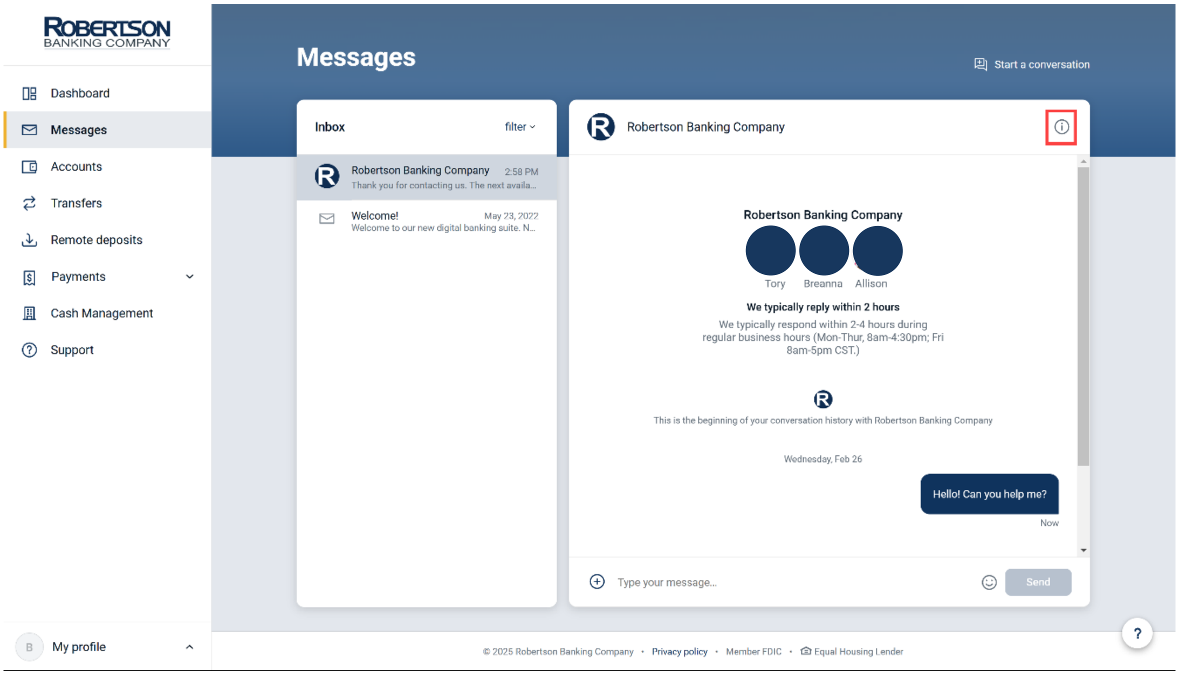
Step 2

Type your message in the field. Click the **+** to add transaction, account, or payment details to your message. You can also attach images or other files. Click **Send** when done.



Close/Delete a Message

Select the icon and click **Close conversation**. Closing a conversation deletes it.



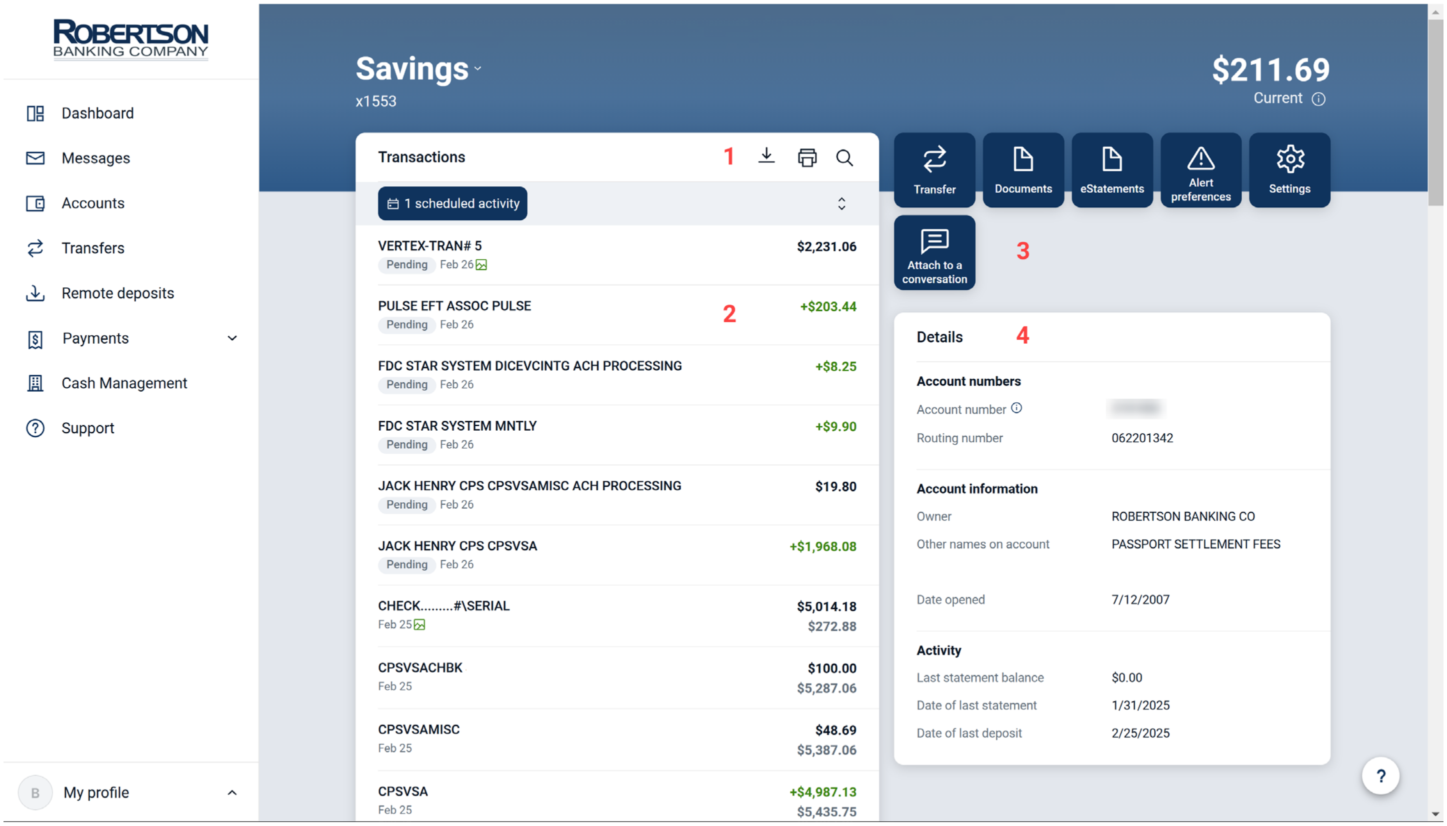
Accounts

Select **Accounts** to see a listing of all the accounts tied to your online banking ID.

Account Information

Select an account from the **Accounts** page or from the **Dashboard.**

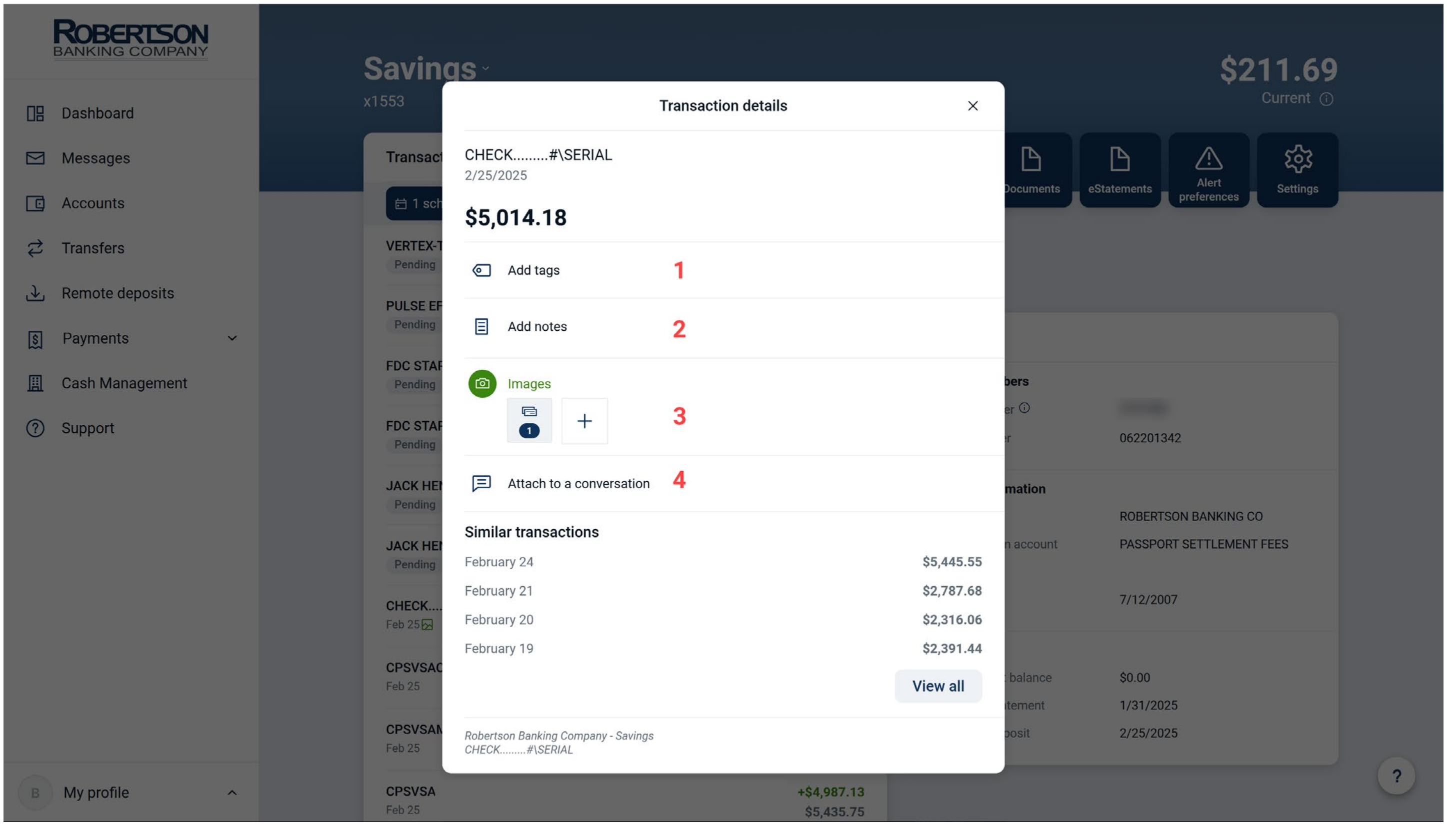
1. Download into CSV, TXT, OFX, QBO or QFX format, print, or search transaction activity.
2. Review recent account activity.
3. Quickly access other features for this account.
4. Review account details such as account and routing numbers, account owners, and important dates.



Transaction Details

Select a transaction to view additional information.

1. Add a **tag** to categorize the transaction.
2. Add **notes** to accompany the transaction description.
3. Review check **images** or add an image such as an invoice or receipt.
4. Attach the transaction details to a conversation with the institution.



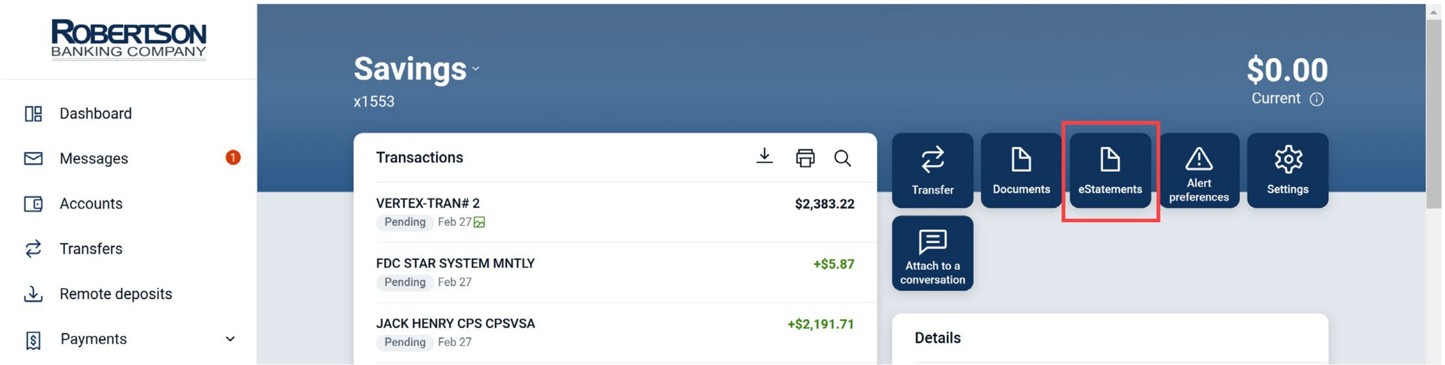
eStatements

Enroll for eStatements to stop paper documents from being mailed. You will receive an email when your electronic document is available to view. eStatements are available online for 18 months.

eStatement Enrollment

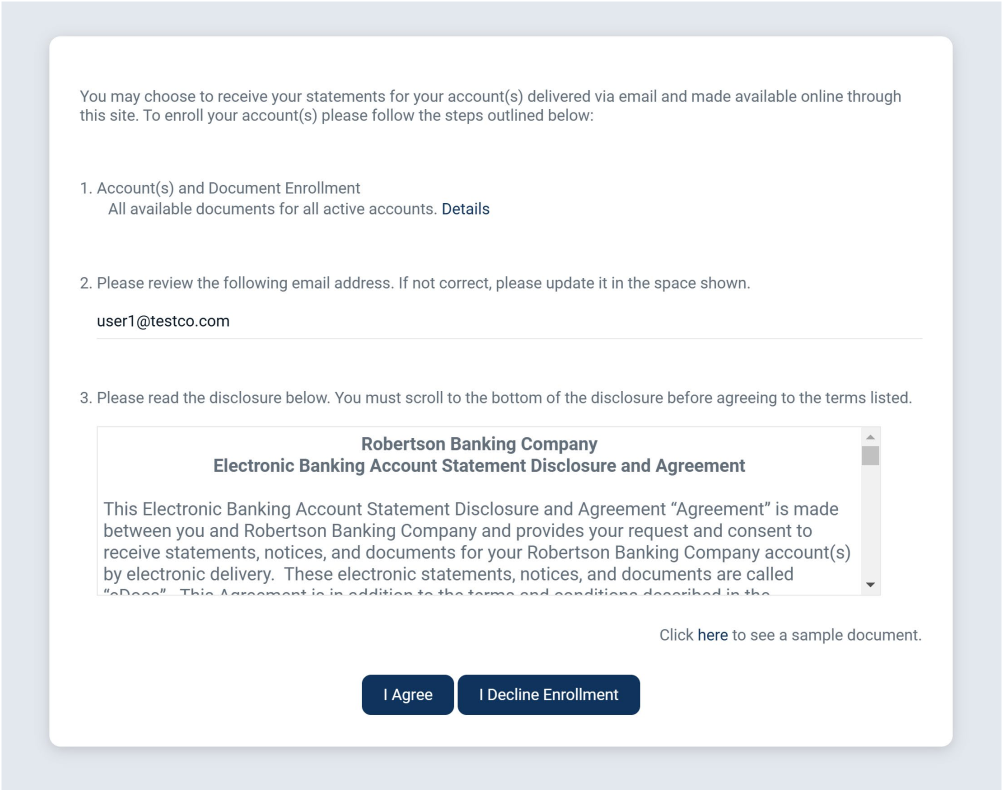
Step 1

Click **eStatements** from the Accounts page or the Dashboard.



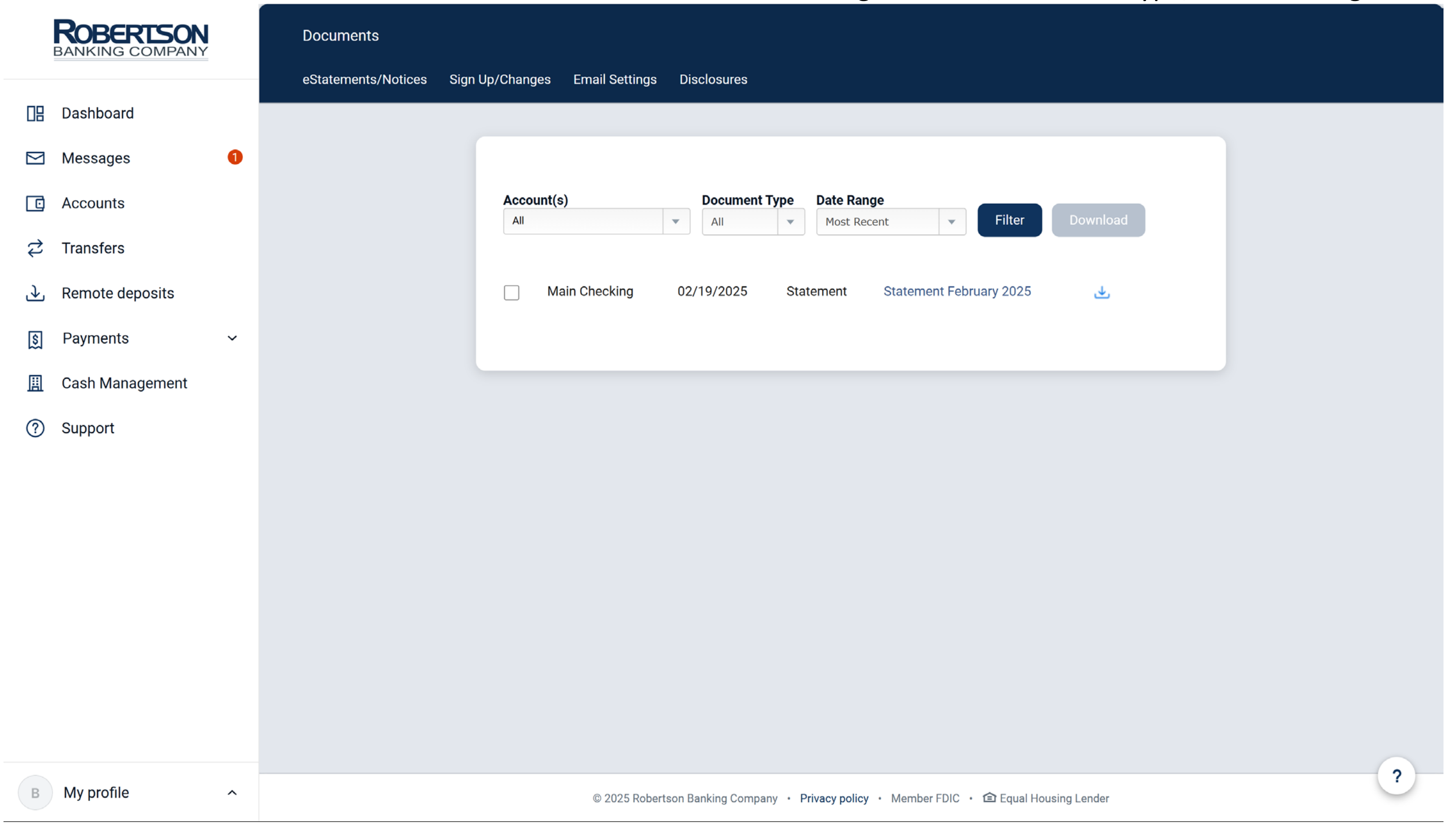
Step 2

1. Click Details and choose the account(s) to enroll.
2. Confirm your email address
3. Accept the disclosure by clicking **I Agree**



Step 3

Select a document to download and view. You can use the filter to change account, document type, and date range.

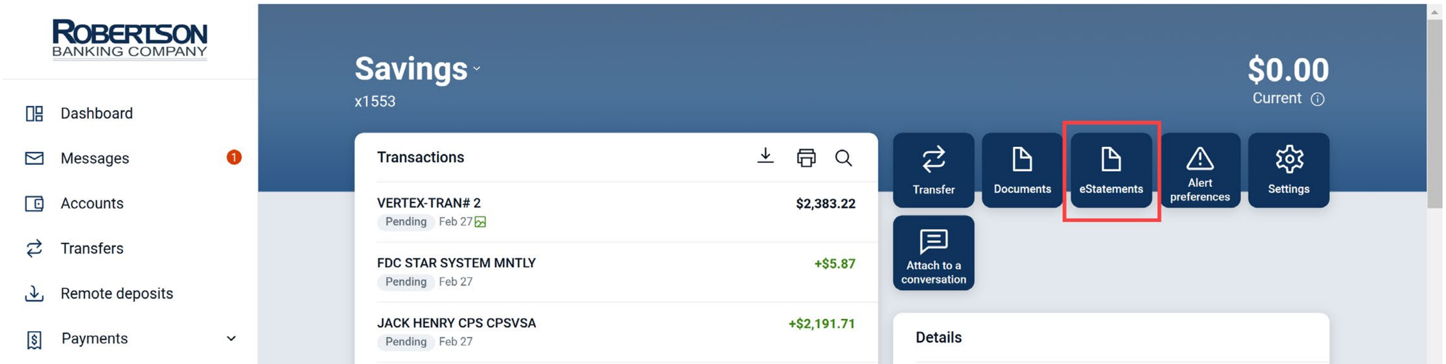


eStatement Enrollment Changes

Need to make changes to your eStatement enrollment?

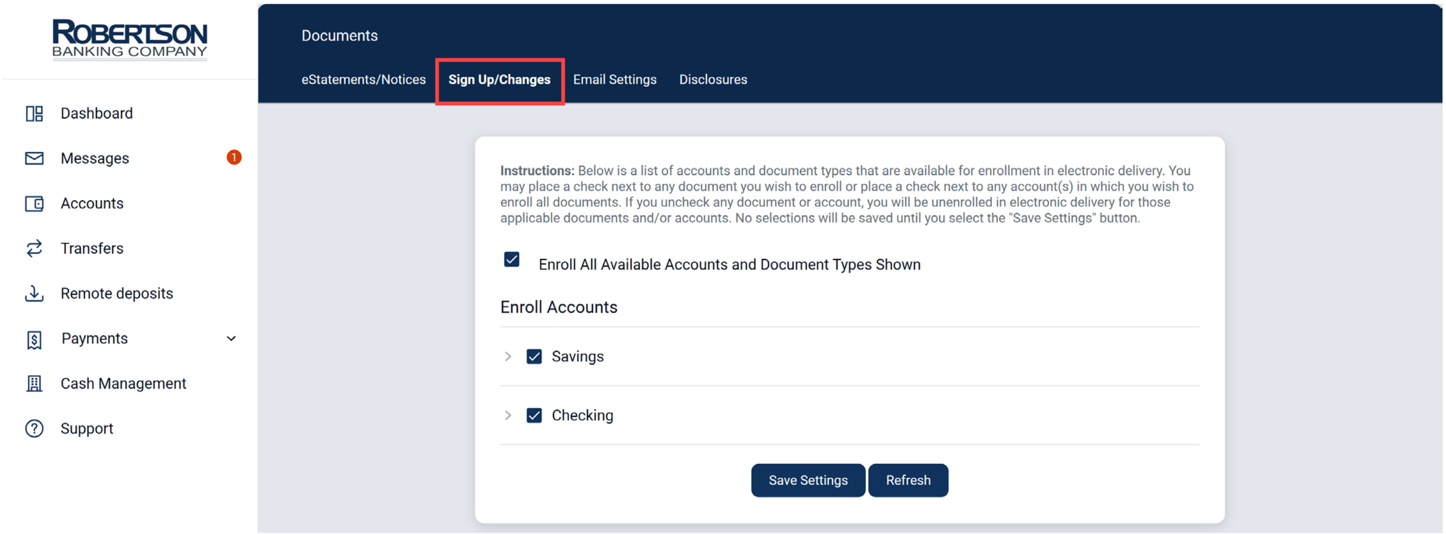
Step 1

Click **eStatements**.



Step 2

Select **Sign Up/Changes.** Choose which accounts to enroll. Click the **>** to expand each account to choose which documents to receive electronically. Click **Save Settings** when done.



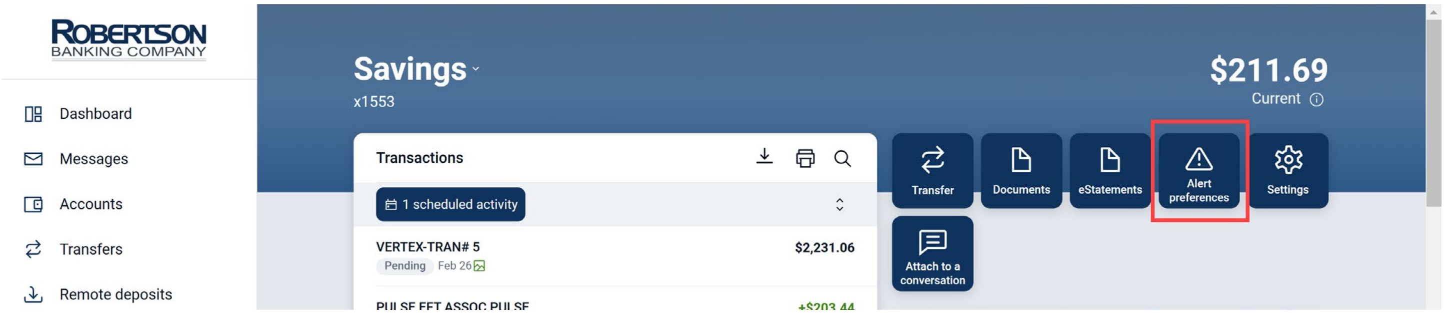
Alerts

Set up alerts to be notified about your balance or certain transactions.

Set up Balance and Transaction Alerts

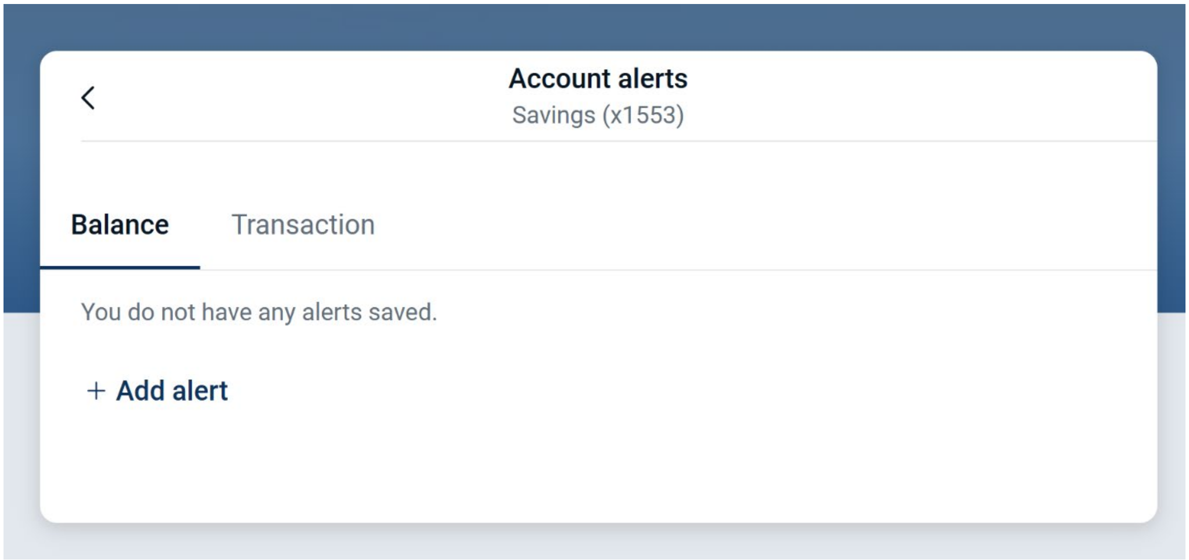
Step 1

Click **Alert Preferences** and select **Balances, transactions, and deposits.**



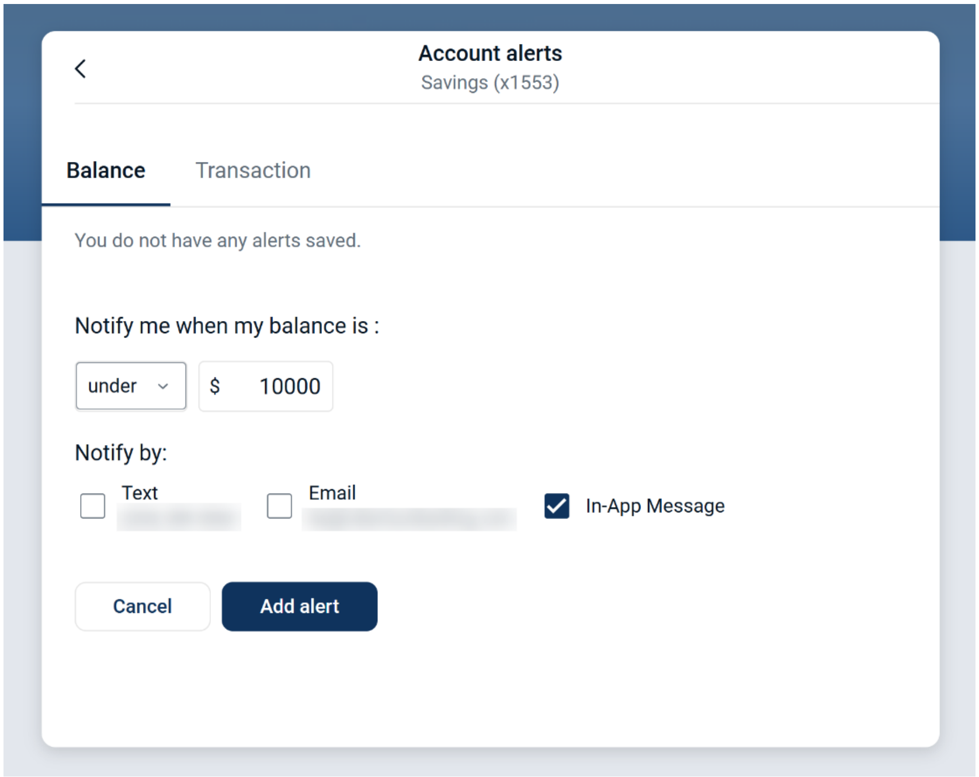
Step 2

Choose **Balance** or **Transaction** and click **+ Add alert**.



Step 3

Complete the details and select how you'd like to receive the alert. Click **Add alert**.



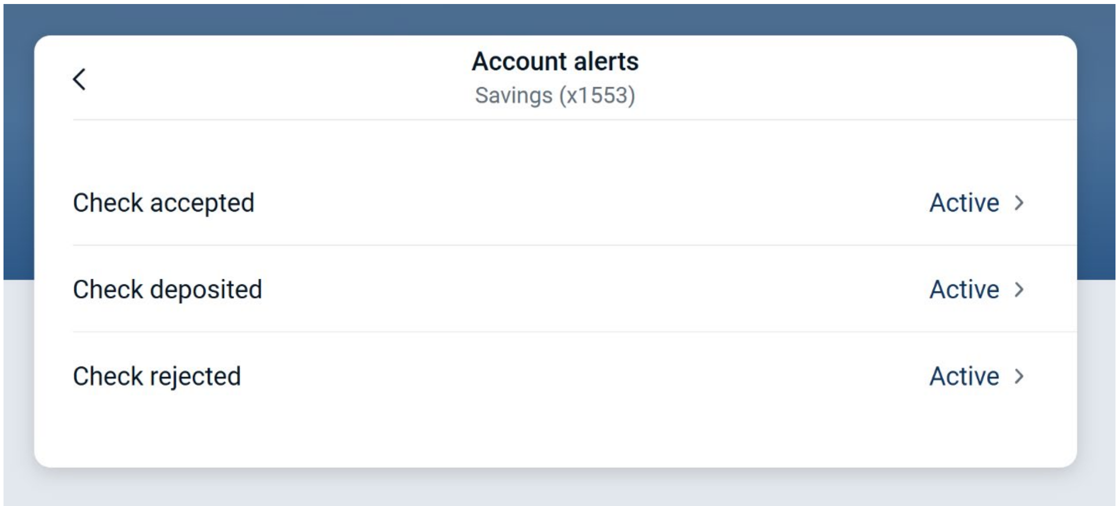
Set Up Check Alerts

Step 1

Click **Alert preferences** and choose **Checks**

Step 2

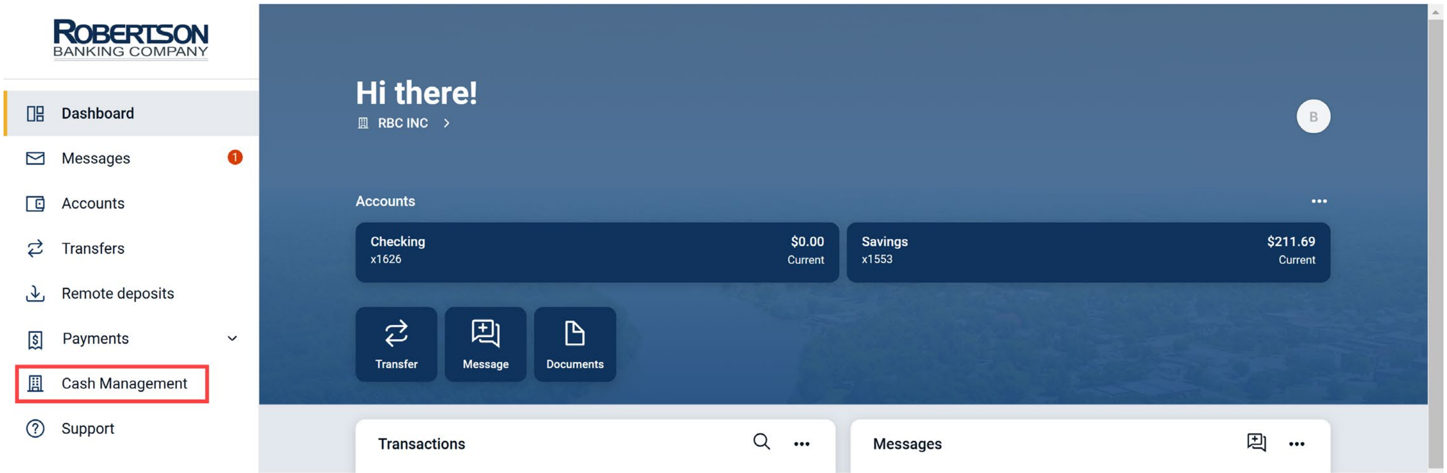
Select an alert and choose how to be notified



Set Up Business Activity Alerts

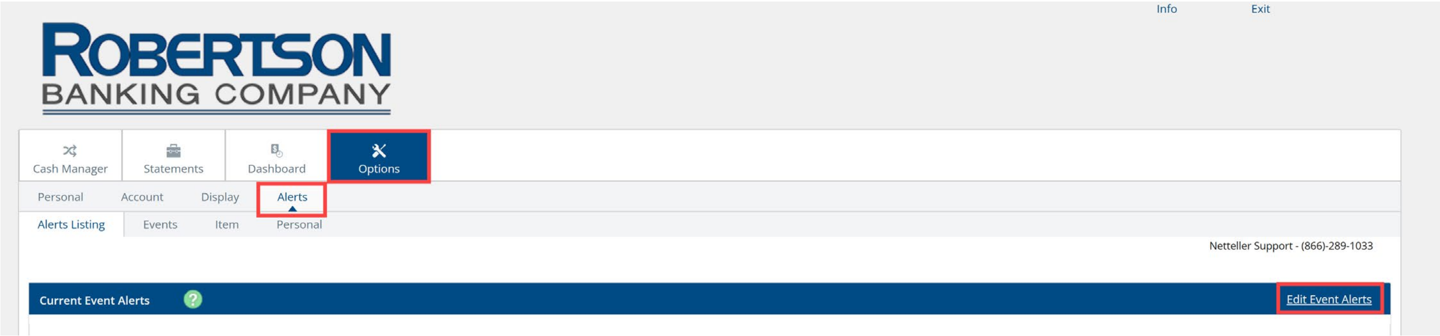
Step 1

Select **Cash Management** from the navigation pane.



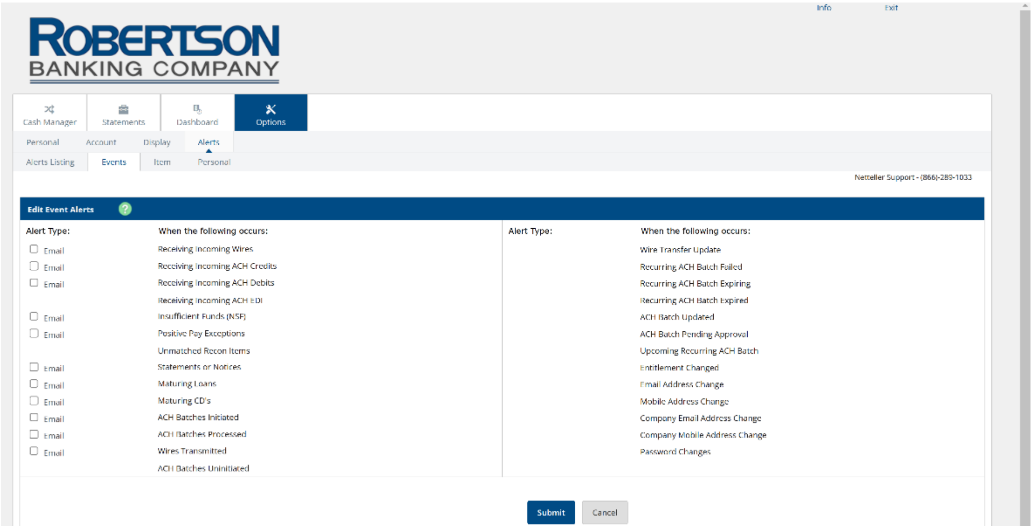
Step 2

Select **Options** and then **Alerts**. Click **Edit Event Alerts**, **Add Item Alert**, or **Add Personal Alert**.



Step 3

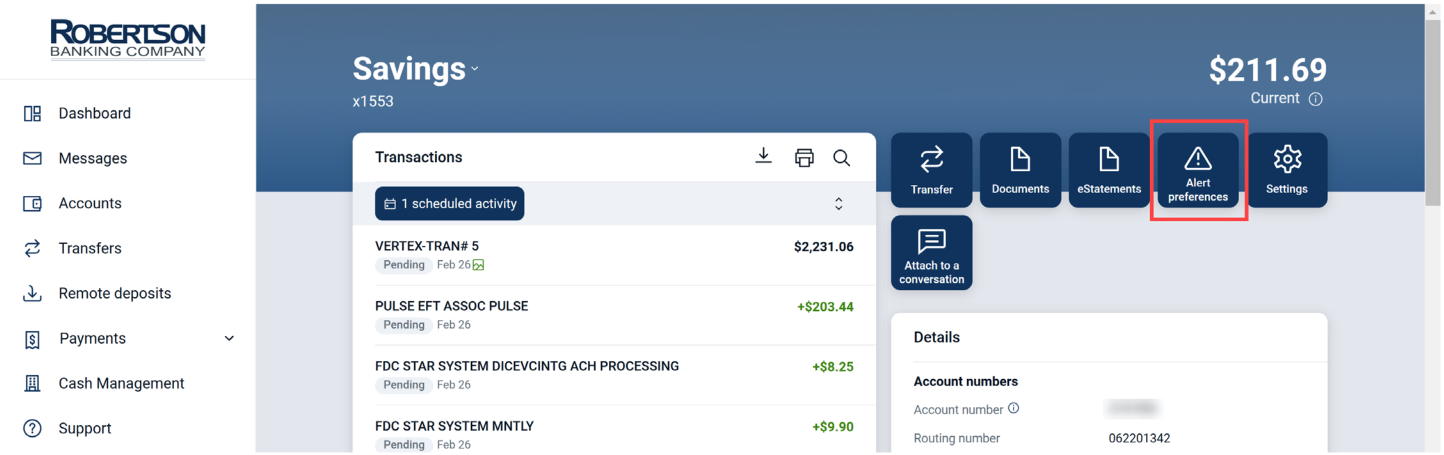
Check the box next to the desired alert. Click **Submit** and then **Accept** once you confirm your email address.



Edit or Delete a Balance and Transaction Alert

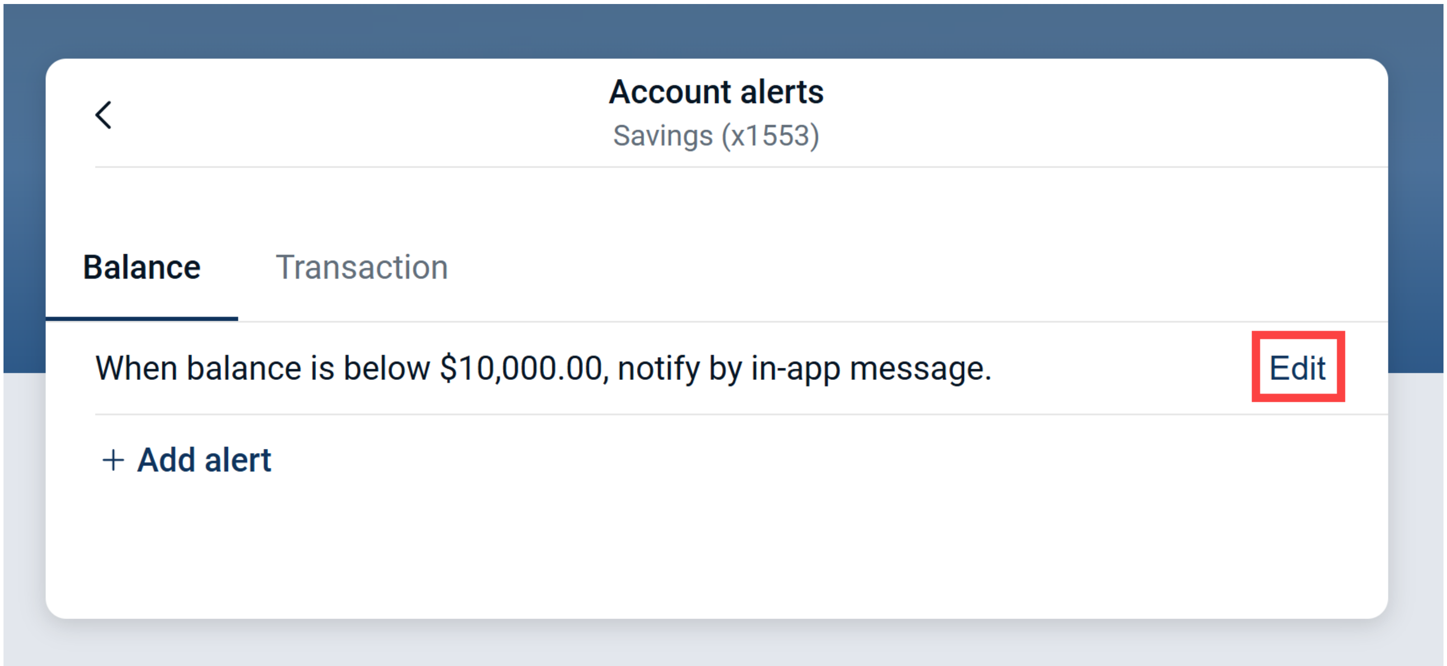
Step 1

From within the account, click **Alert Preferences** and select **Balances, transactions, and deposits**.



Step 2

Toggle between **Balance** and **Transaction** to find the alert to modify or delete. Select **Edit**.



Step 3

Modify the details or click the **trash can** icon to delete.

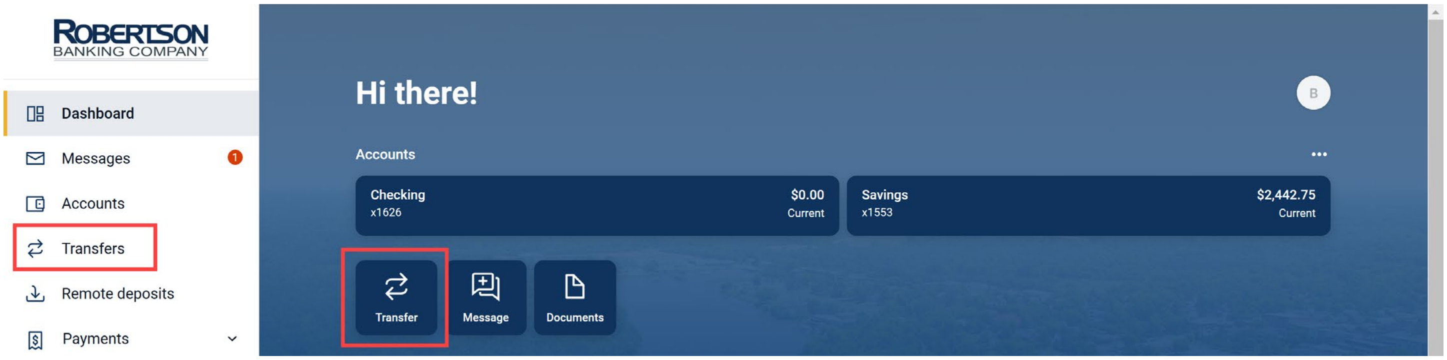
Transfers

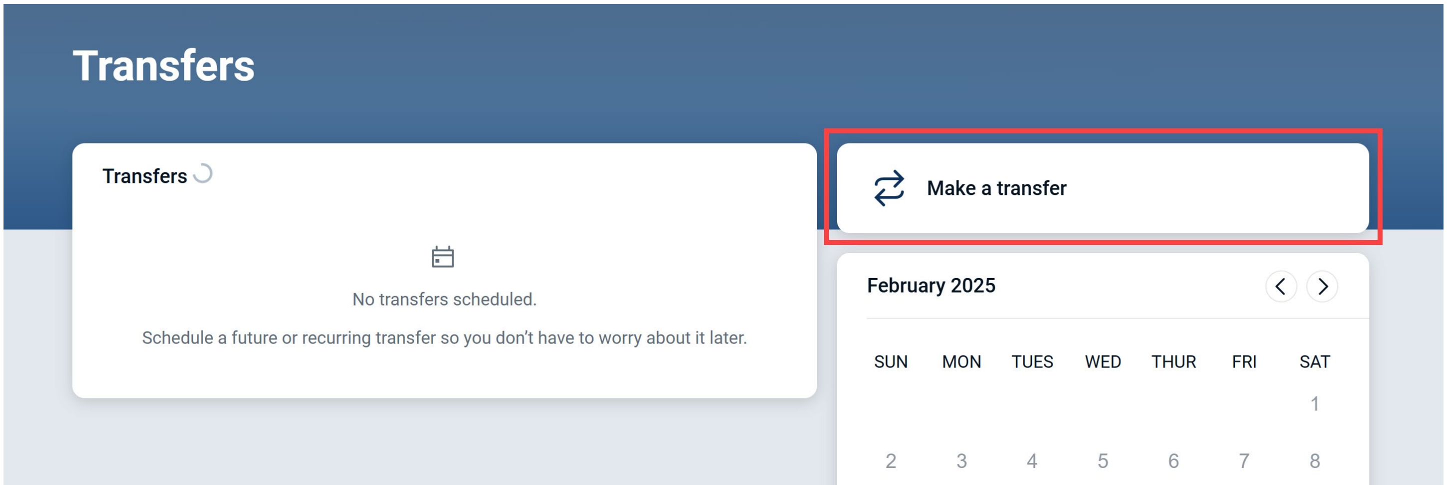
Move money between internal accounts.

Submit a Transfer

Step 1

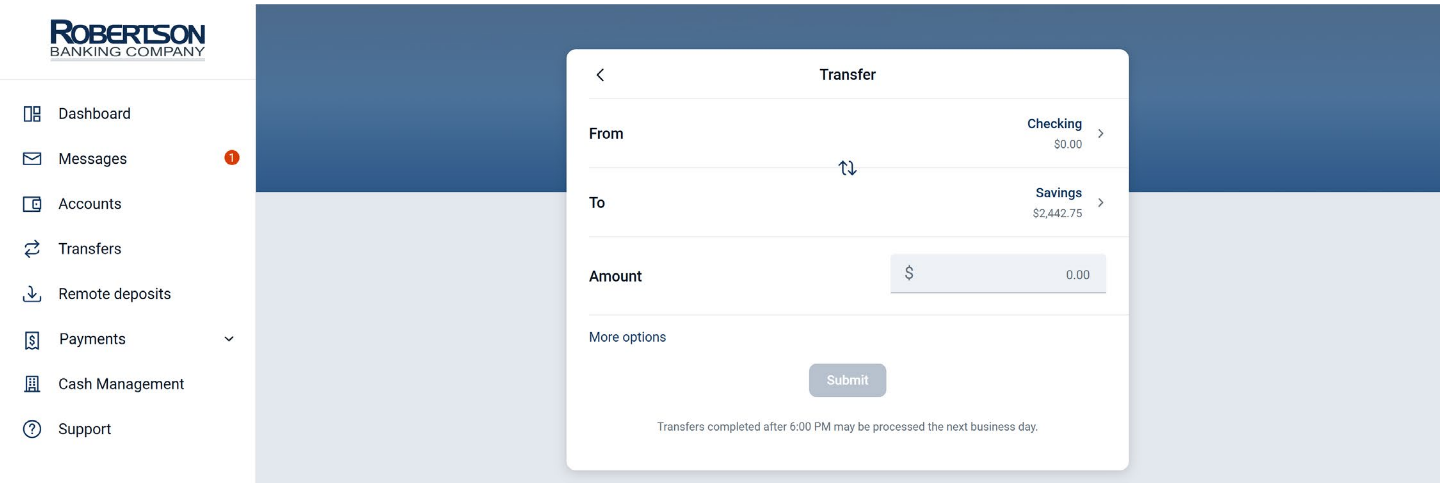
Click **Transfer** or **Make a Transfer** from the **Dashboard** or the **Transfers** page.





Step 2

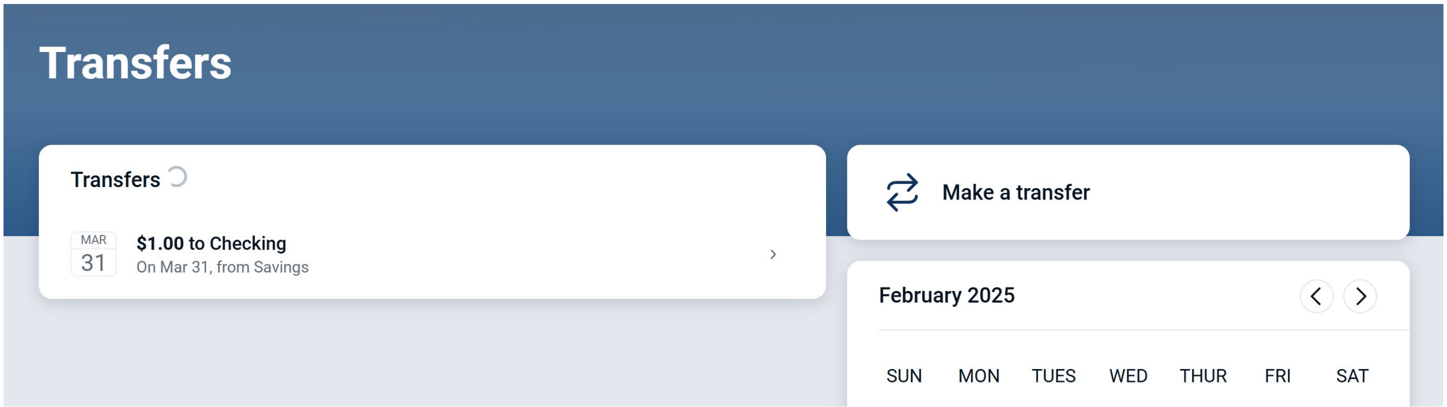
Select your **From** and **To** accounts and enter the amount to transfer.
Click **More options** to set up a recurring frequency, select a future date, or add a memo if applicable. Click **Submit**.

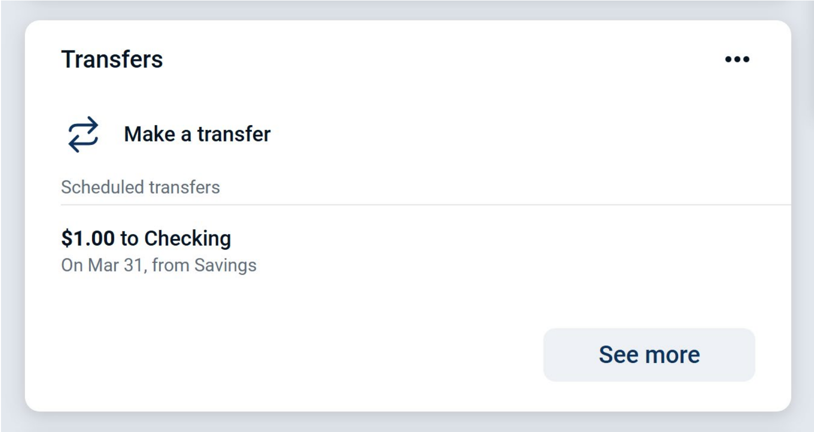


Edit or Delete a Transfer

Step 1

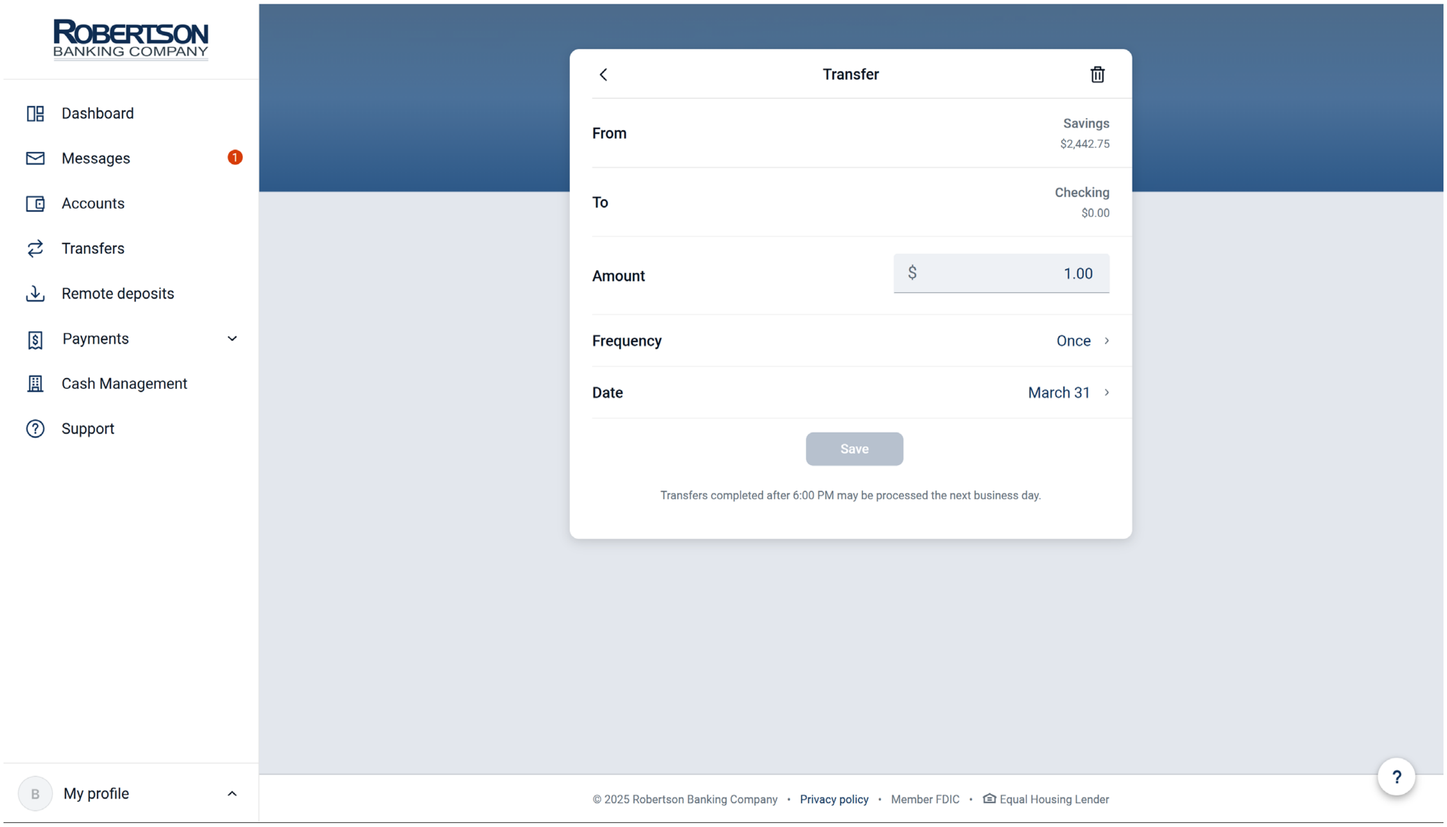
Navigate to the **Transfers** card on the **Dashboard** or the **Transfers** page to find the transfer to edit or delete.





Step 2

Select the transfer and modify details or select the **trash can** icon to delete.

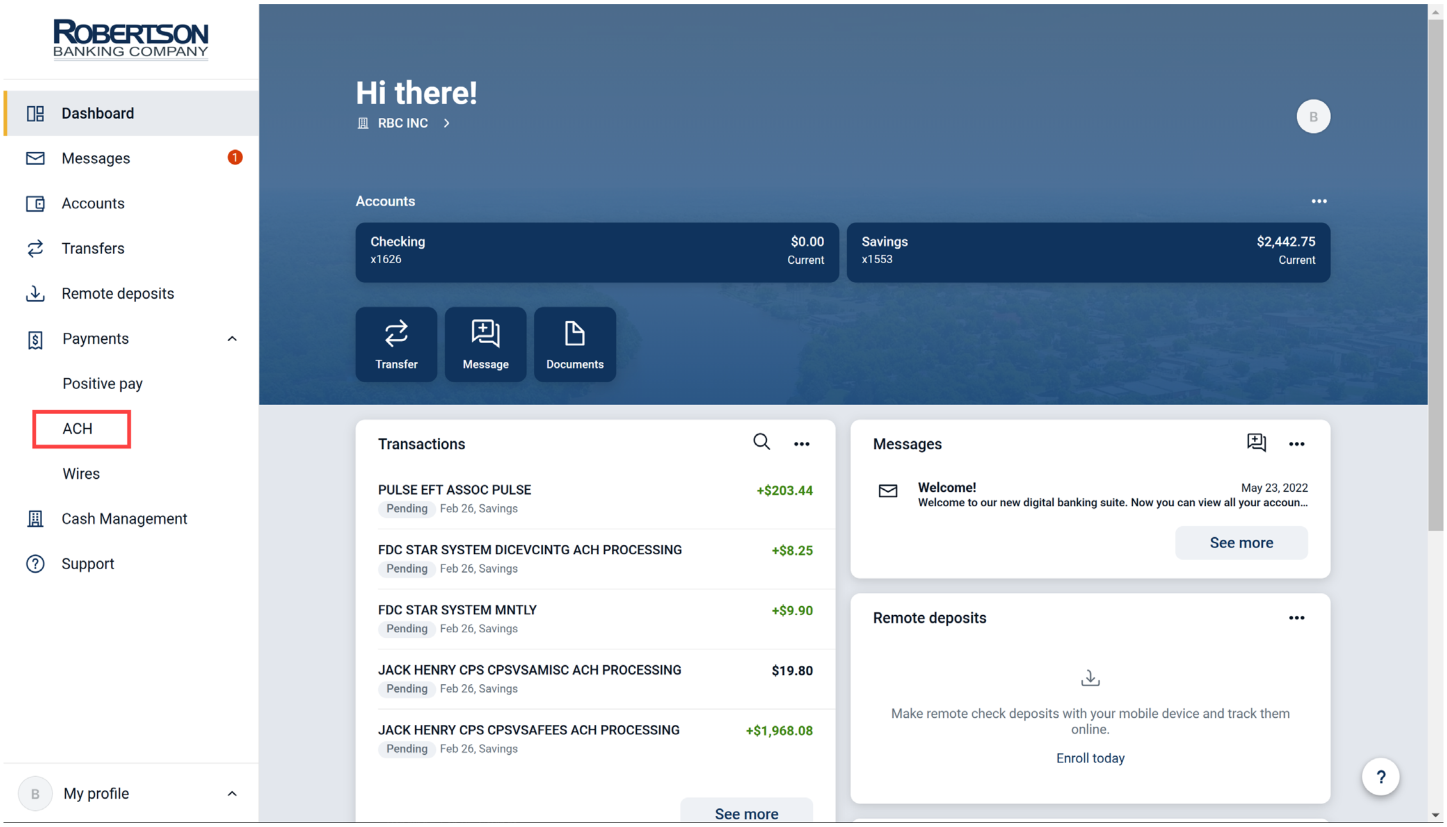


ACH

Create a Batch Manually

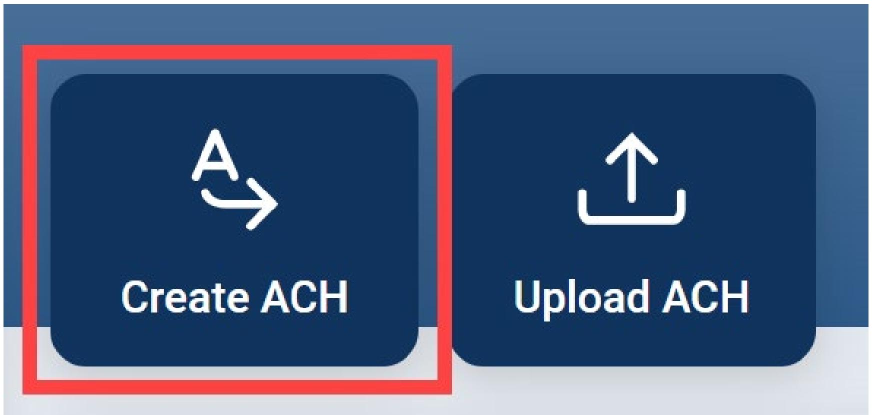
Step 1

Select **ACH** from the navigation pane.
Please note: If you have multiple payment features activated, select the **Payments** menu first.



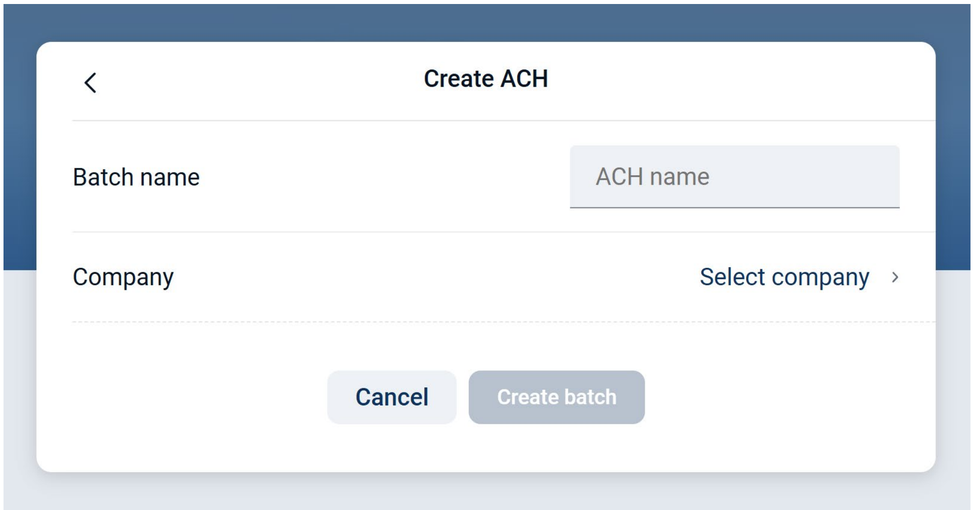
Step 2

Click **Create ACH**.



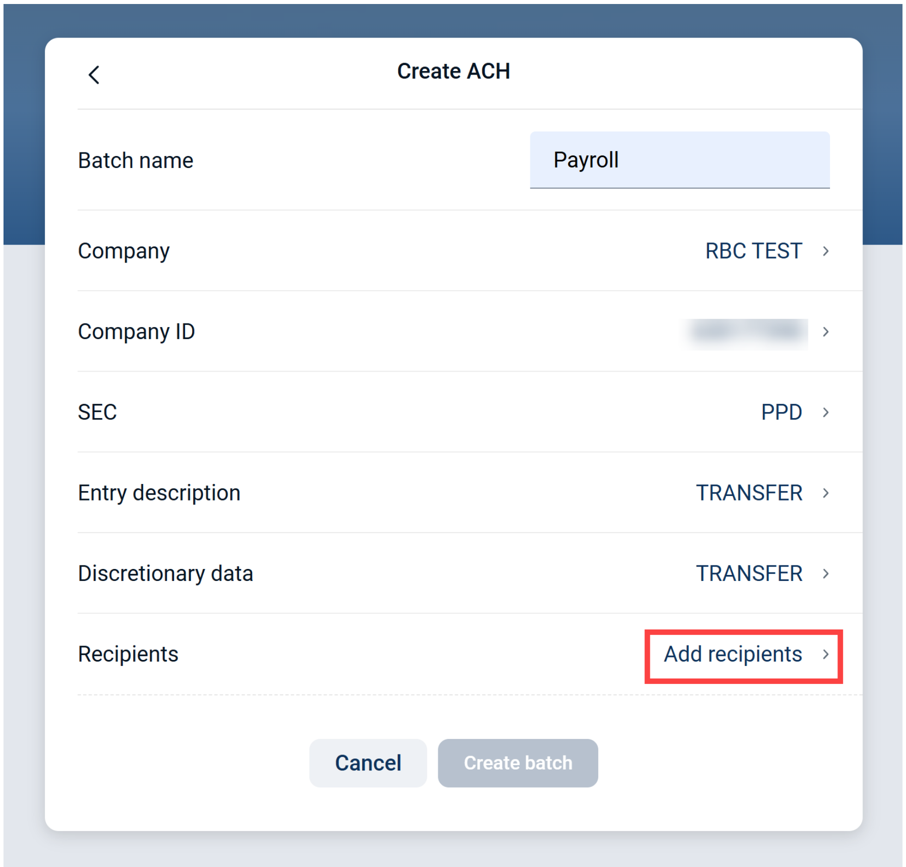
Step 3

Enter the **Batch name** and select the **ACH company** to originate the payment from.



Step 4

Confirm that the correct **SEC** code, **Entry description**, and **Discretionary data** display. Modify if necessary. Click **Add recipients**.



Step 5

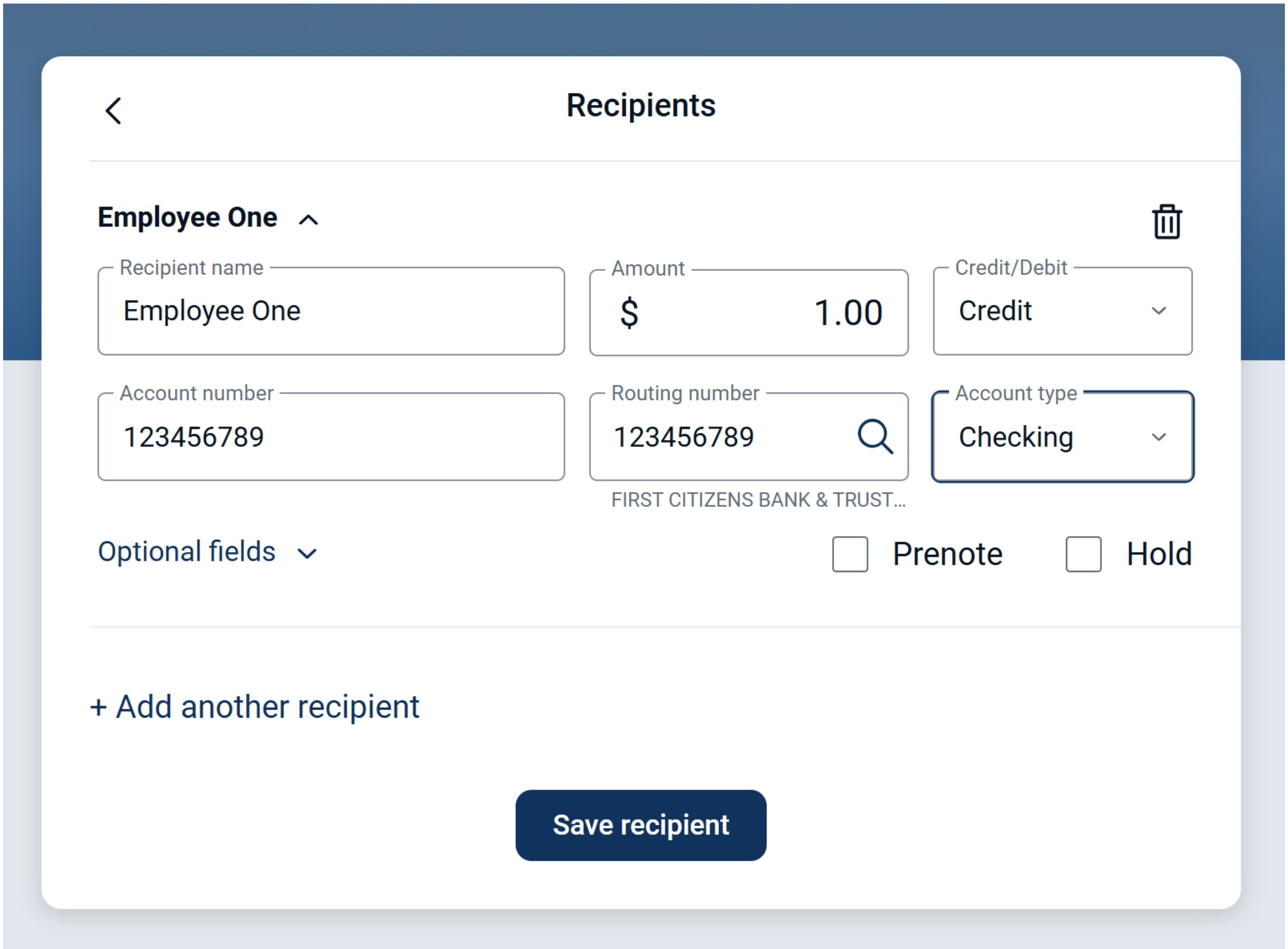
Enter the **Recipient name**, the **amount** to pay them, transaction type (**Credit** or **Debit**), and account information.

Click **Optional fields** to enter a recipient ID number or addenda information.

Check **Prenote** to create a zero dollar batch for this transaction. This prenote batch may then be initiated to confirm account details prior to sending the live batch. (optional)

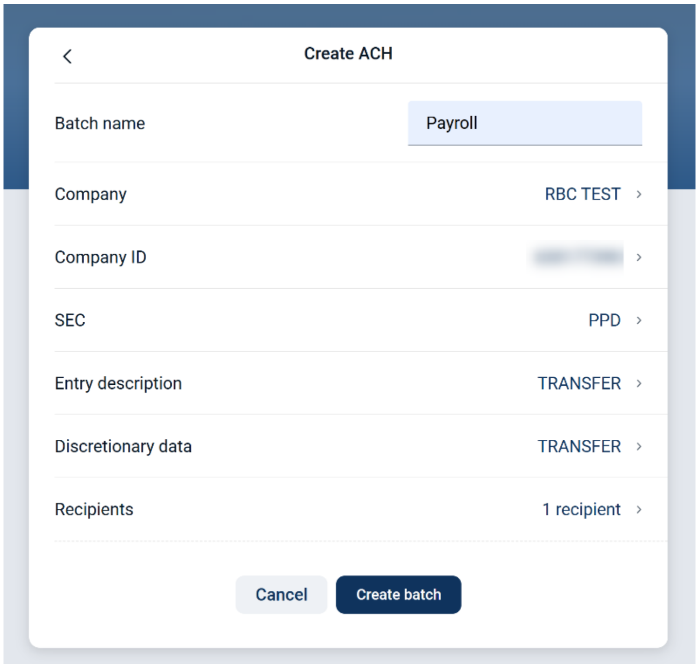
Check **Hold** to prevent this transaction from processing with the other transactions in the batch. (optional)

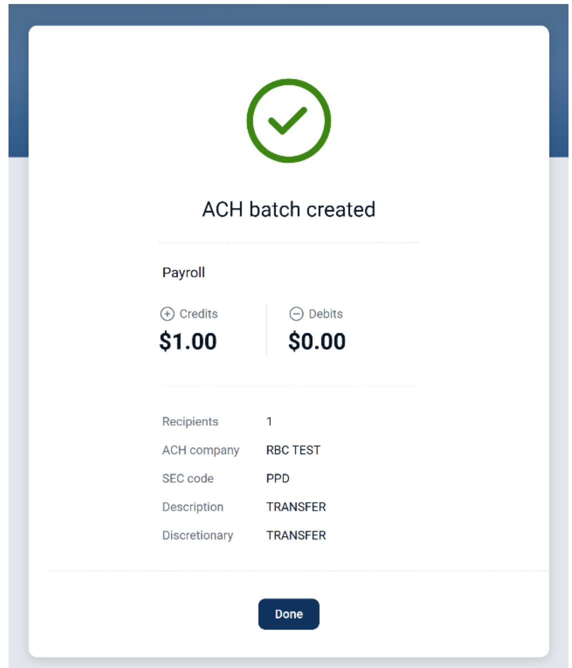
Click **+ Add another recipient** to enter another recipient. Click **Save recipient** when done adding recipients to the batch



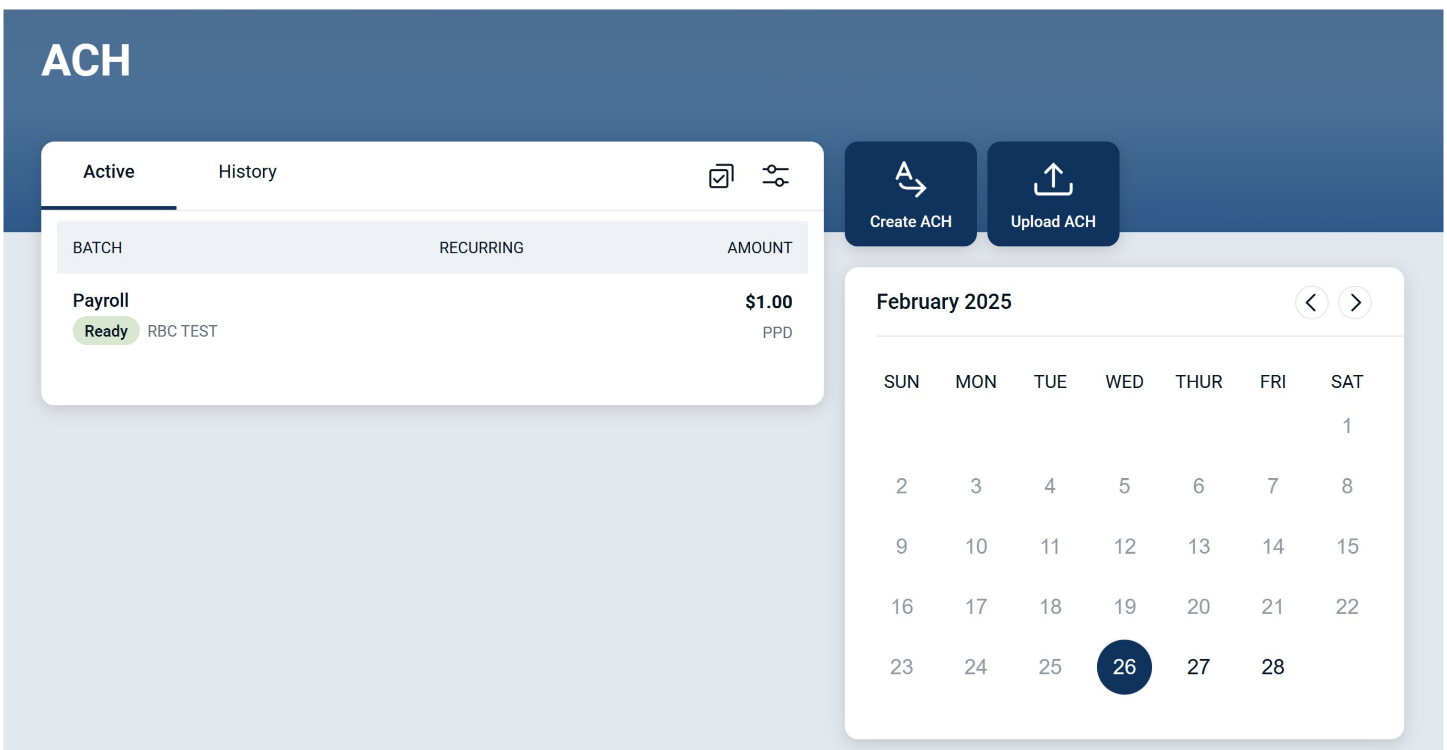
Step 6

Click **Create batch**, review the confirmation, then click **Done**.





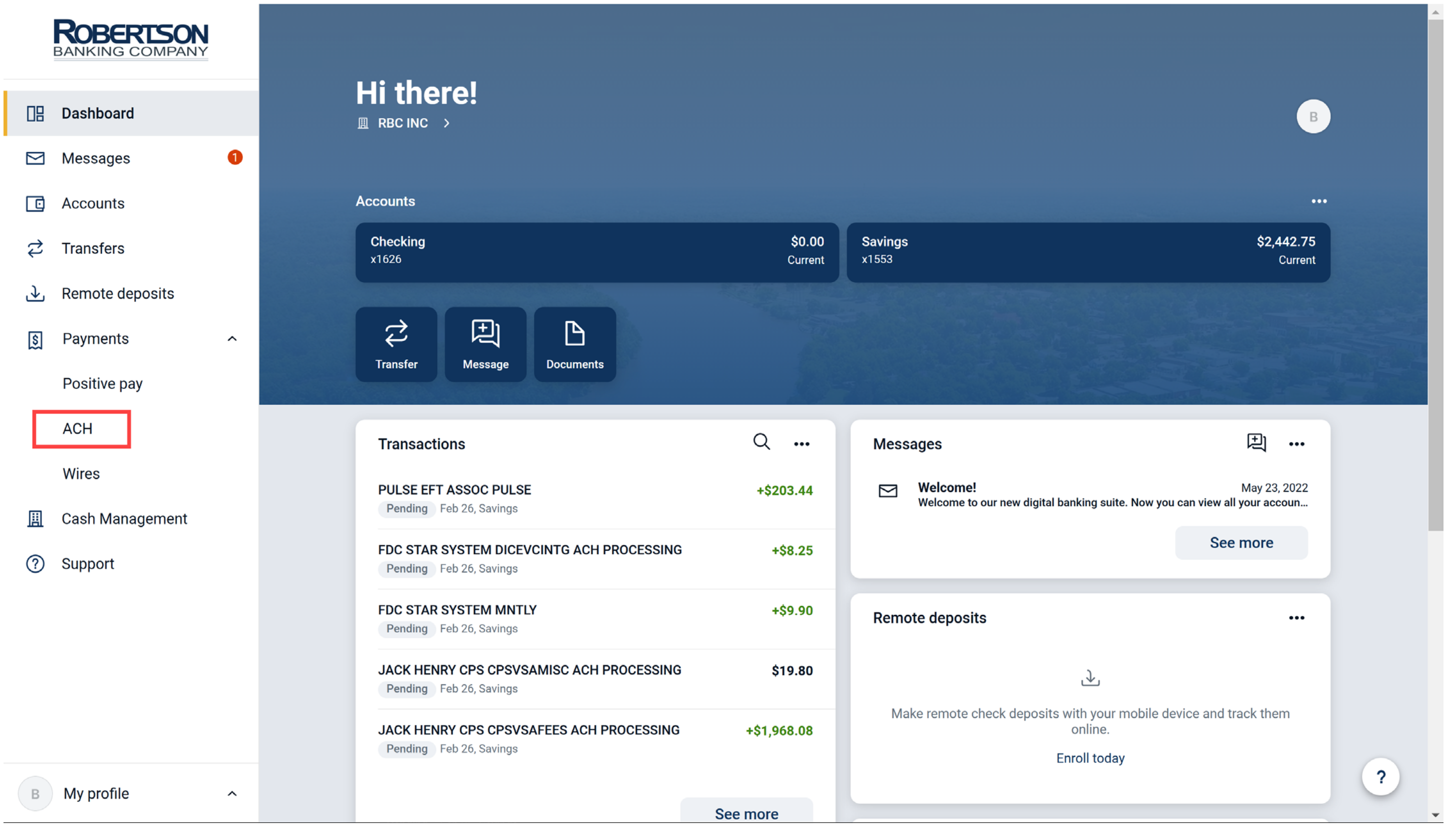
The batch will appear under the **Active** tab in a **Ready** status.
Please see the **Initiate a Batch** section for steps on how to send the payment.



Upload a NACHA File

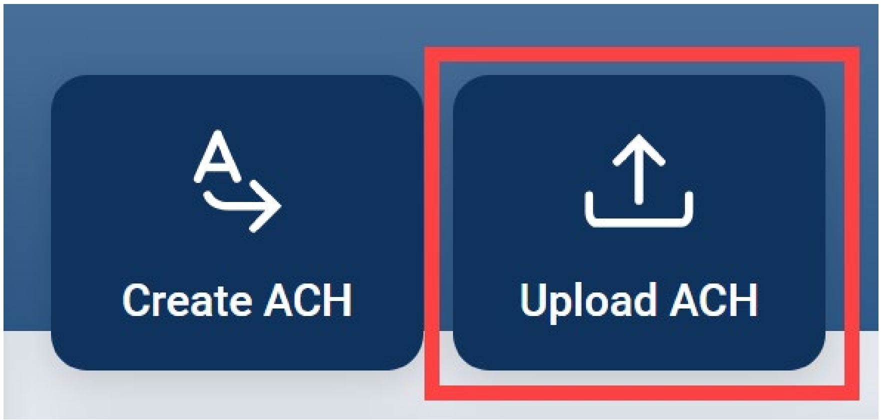
Step 1

Select **ACH** from the navigation pane.
Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

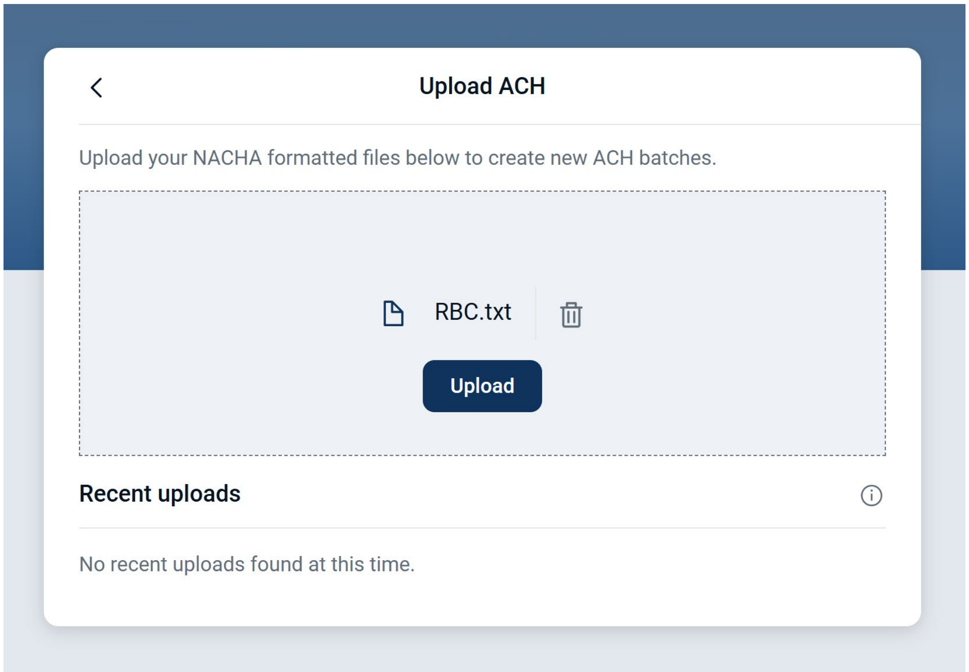
Click **Upload ACH**.



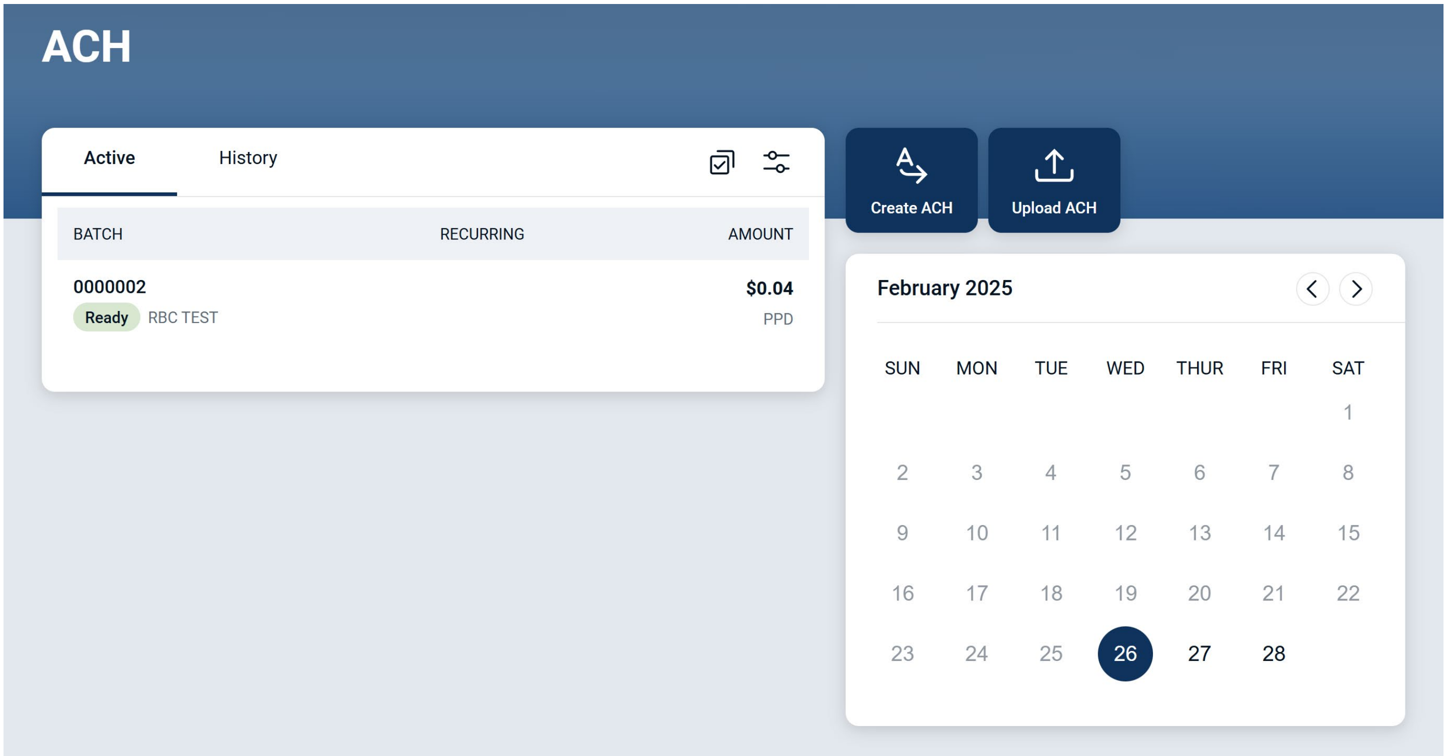
Step 3

Browse for your file and click **Upload.** Review your file for proper formatting if you receive an error.

The batch will appear under the **Active** tab in a **Ready** status.
Note: A generic name will be given to an uploaded batch. Select the batch and click **Edit** if you wish to change the name.



Please see the **Initiate a Batch** section in this document for steps on how to send the payment.

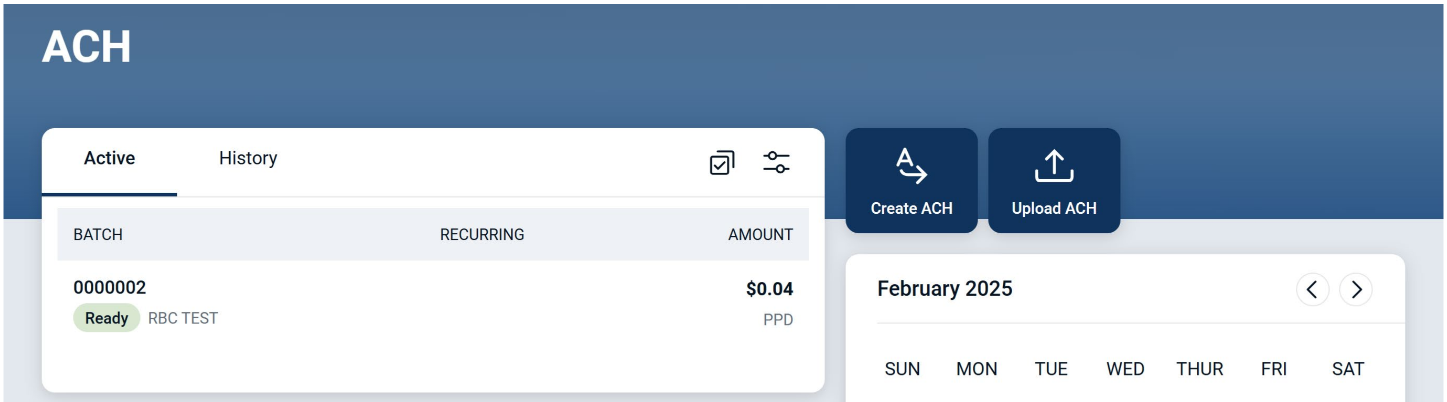


Edit or Delete a Batch

Please note: Batches in an initiated or processed status cannot be edited or deleted. Please uninitiate the batch first or contact the bank for assistance.

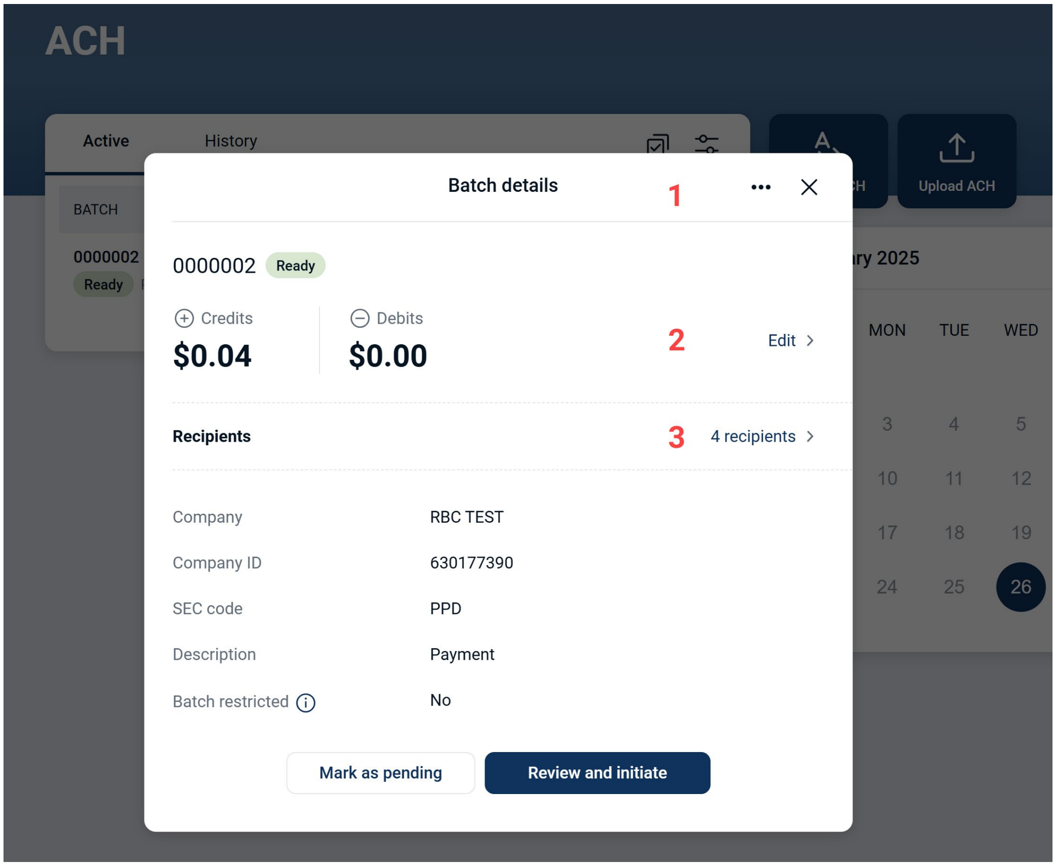
Step 1

Select the batch.



Step 2

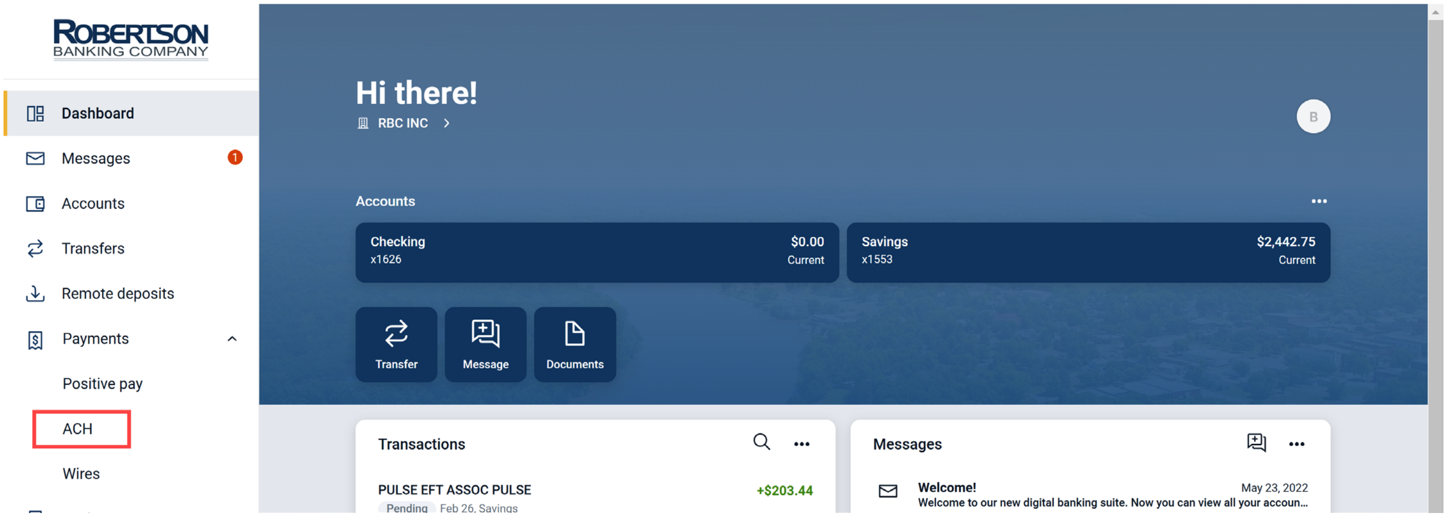
1. Select the ellipsis icon to delete the batch.
2. Click **Edit** to modify the batch header information.
3. Click **Recipients** to add, delete, or modify the recipient(s) account information or payment amount(s).



Initiate a Batch

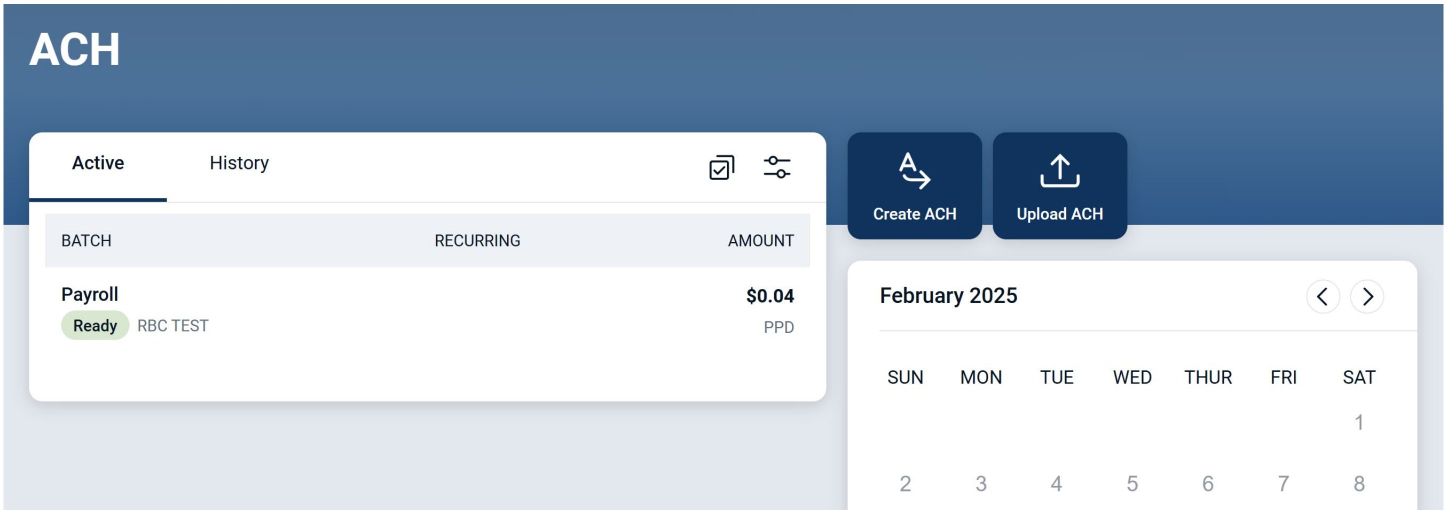
Step 1

Select **ACH** from the navigation pane.
Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

Select the batch in a **Ready** status and click **Review and initiate**.
Please note: If dual control is activated, you cannot initiate a batch that you created or edited. A second user will need to complete this step.



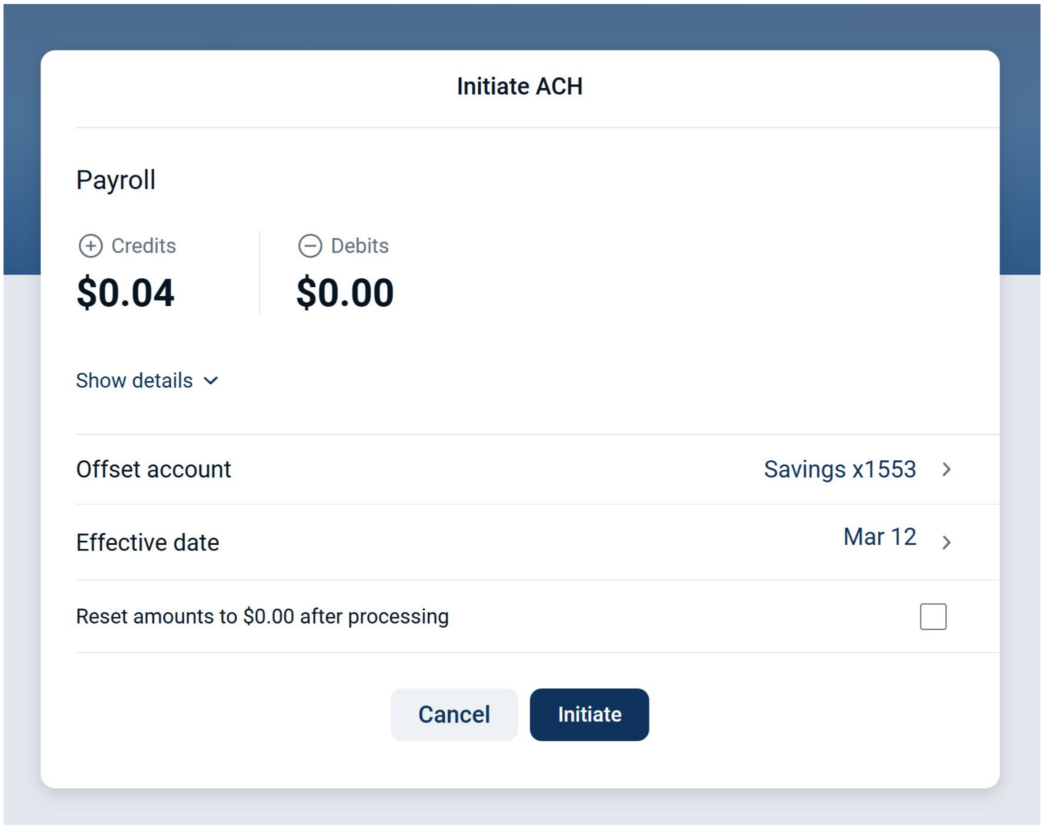
Step 3

Select the **Offset account** if applicable, recurring **Frequency** if applicable, and the **Effective date**.

Check the Reset amounts to $0.00 after processing if you'd like to clear out the dollar amounts in the template after processing. (optional)

Click **Initiate**.

You may be asked to authenticate.

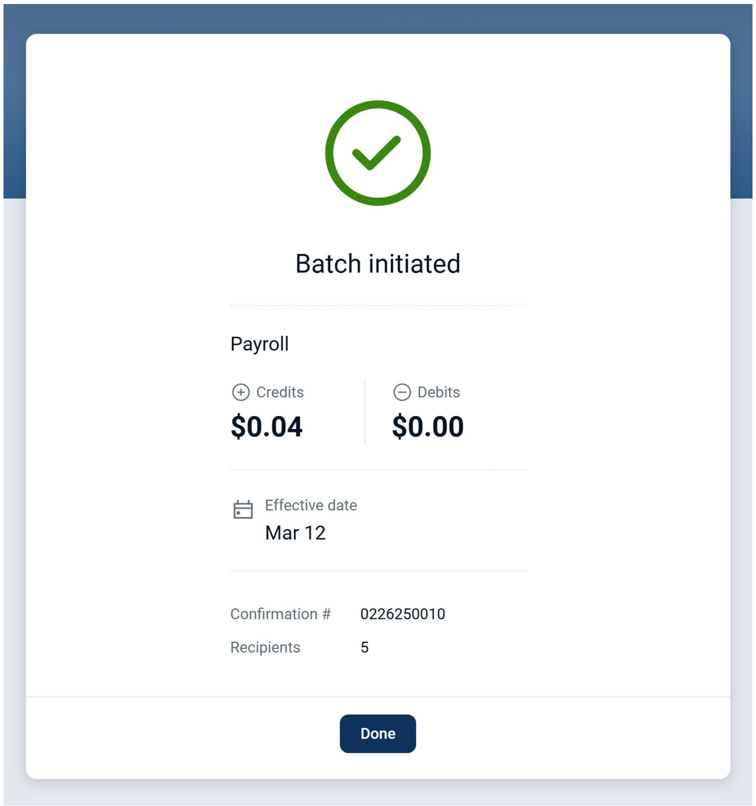


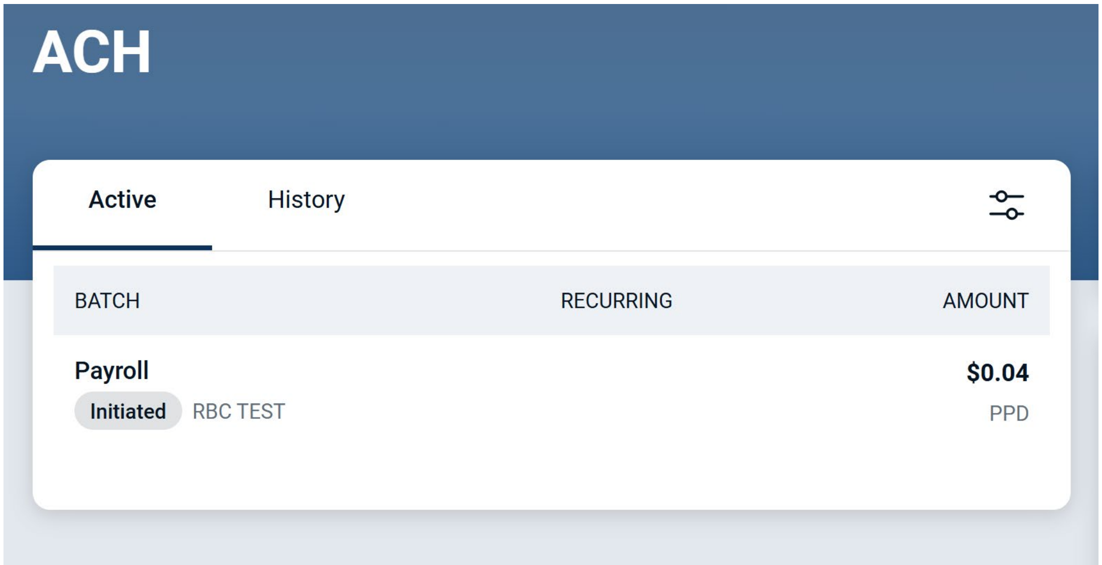
Review your confirmation and click **Done**.

The batch will appear in an **Initiated** status under the **Active** tab.

Please note: Batches in an Initiated status may be uninitiated up until our cut off. Please see the **Uninitiate a Batch** section in this document for more information.

The batch will return to a **Ready** status after processing and may be reused, edited, or deleted.

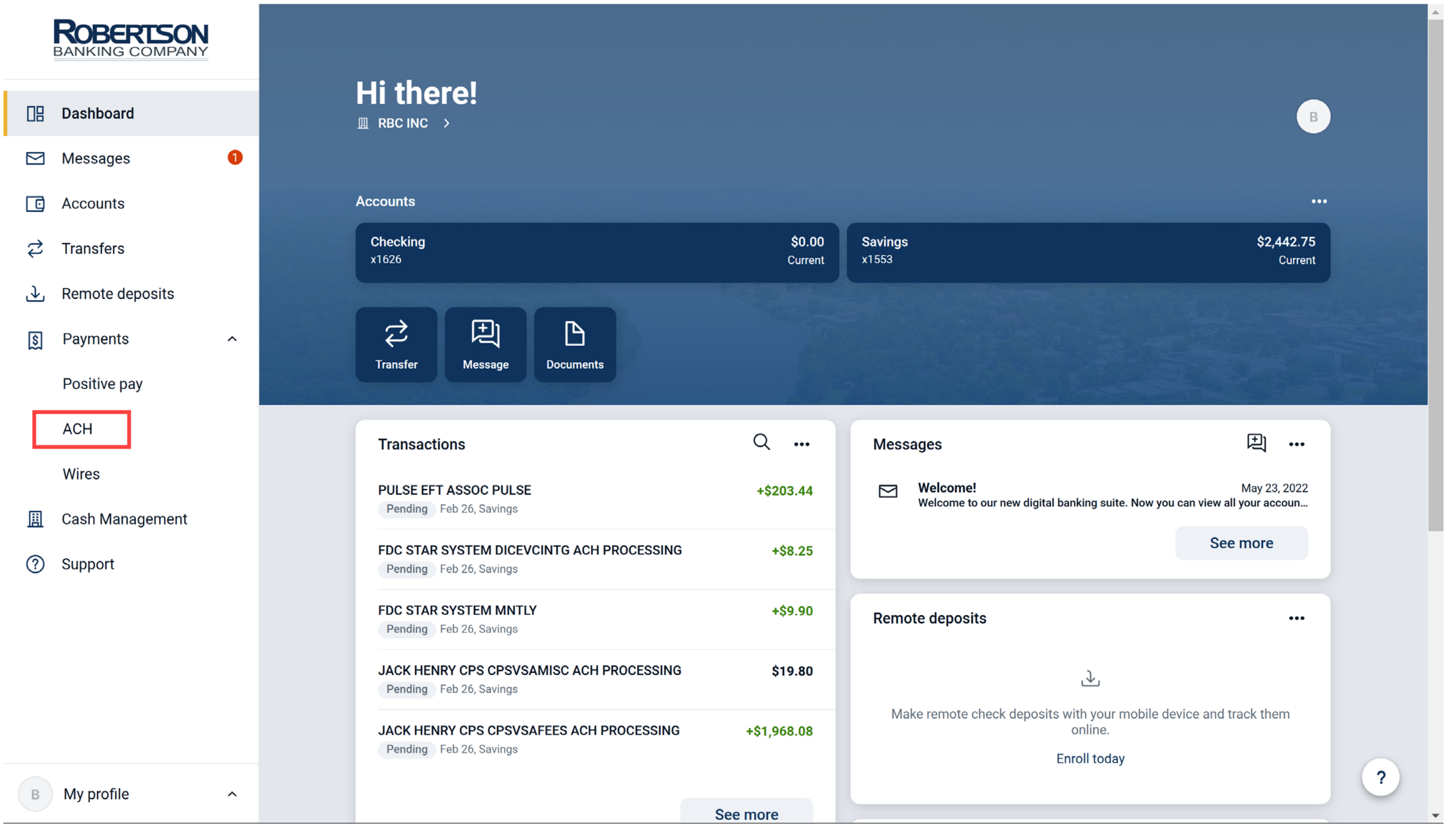




Initiate Multiple Batches

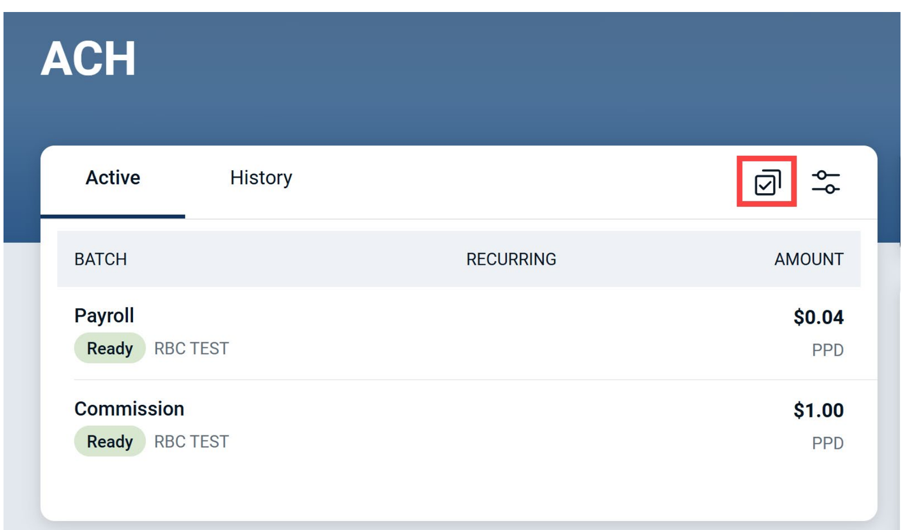
Step 1

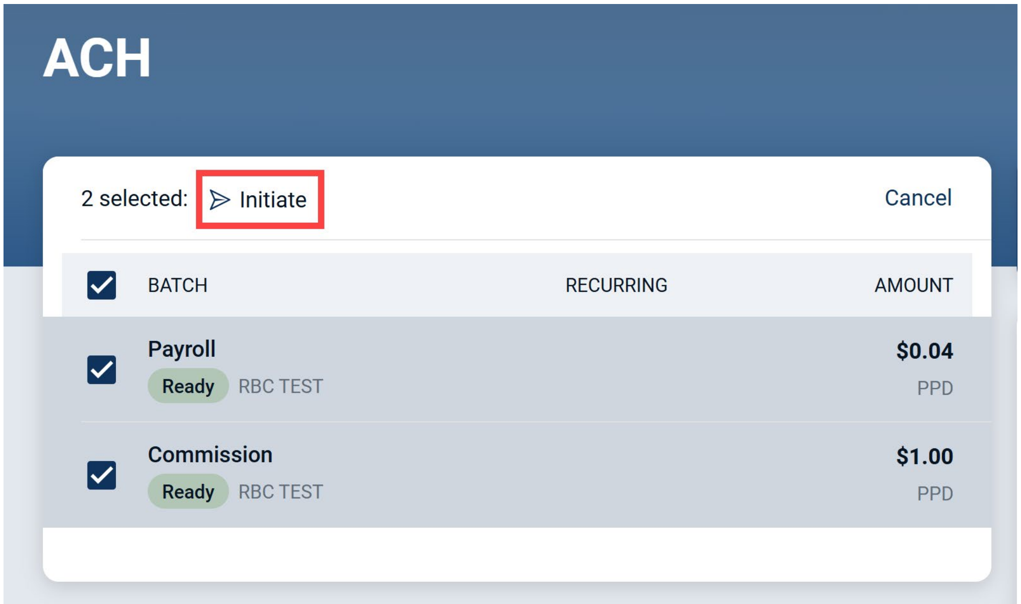
Select **ACH** from the navigation pane.
Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

Click the **Bulk Action** icon and select the batches you want to initiate. Click **Initiate**.



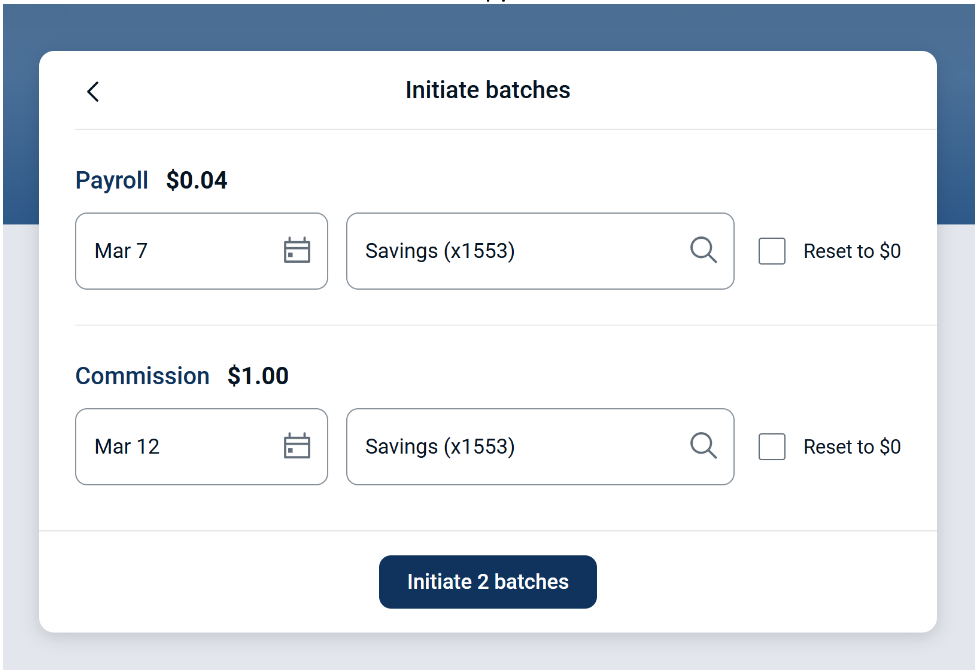


Step 3

Enter the **Effective date**, select the **Offset account** if applicable, and check the **Reset to $0** box if desired for each batch. Click **Initiate**.

You may be asked to enter your password to authenticate.

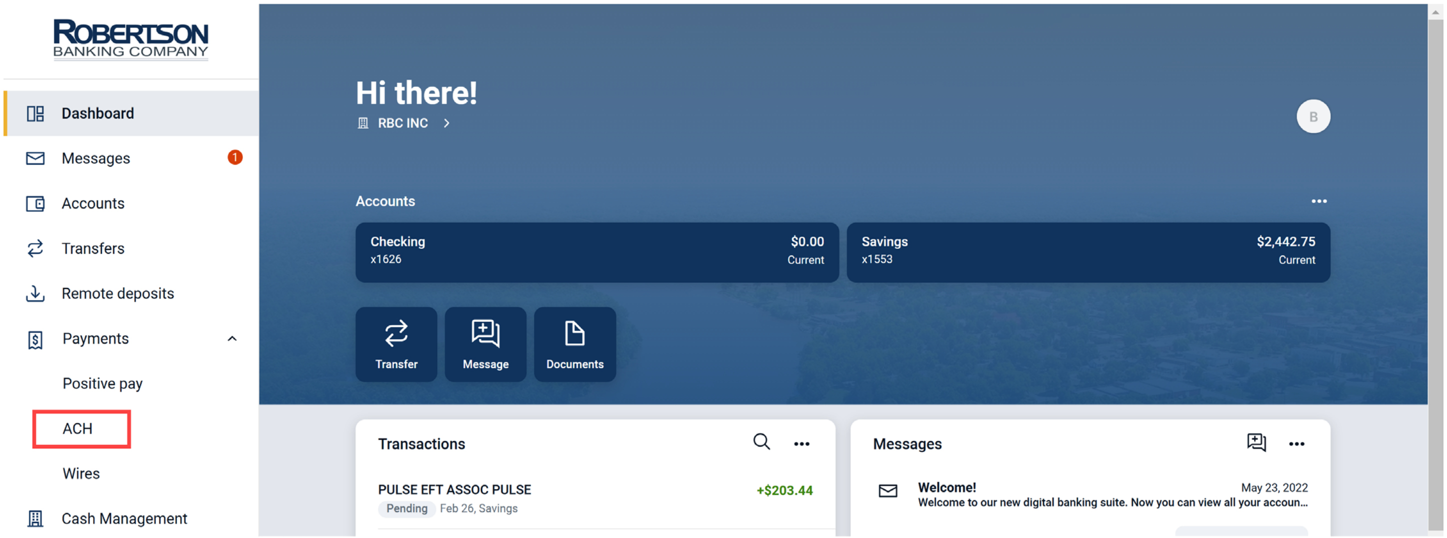
Review your confirmation and click **Done**. The batches will appear in an Initiated status under the **Active** tab.



Uninitiate a Batch

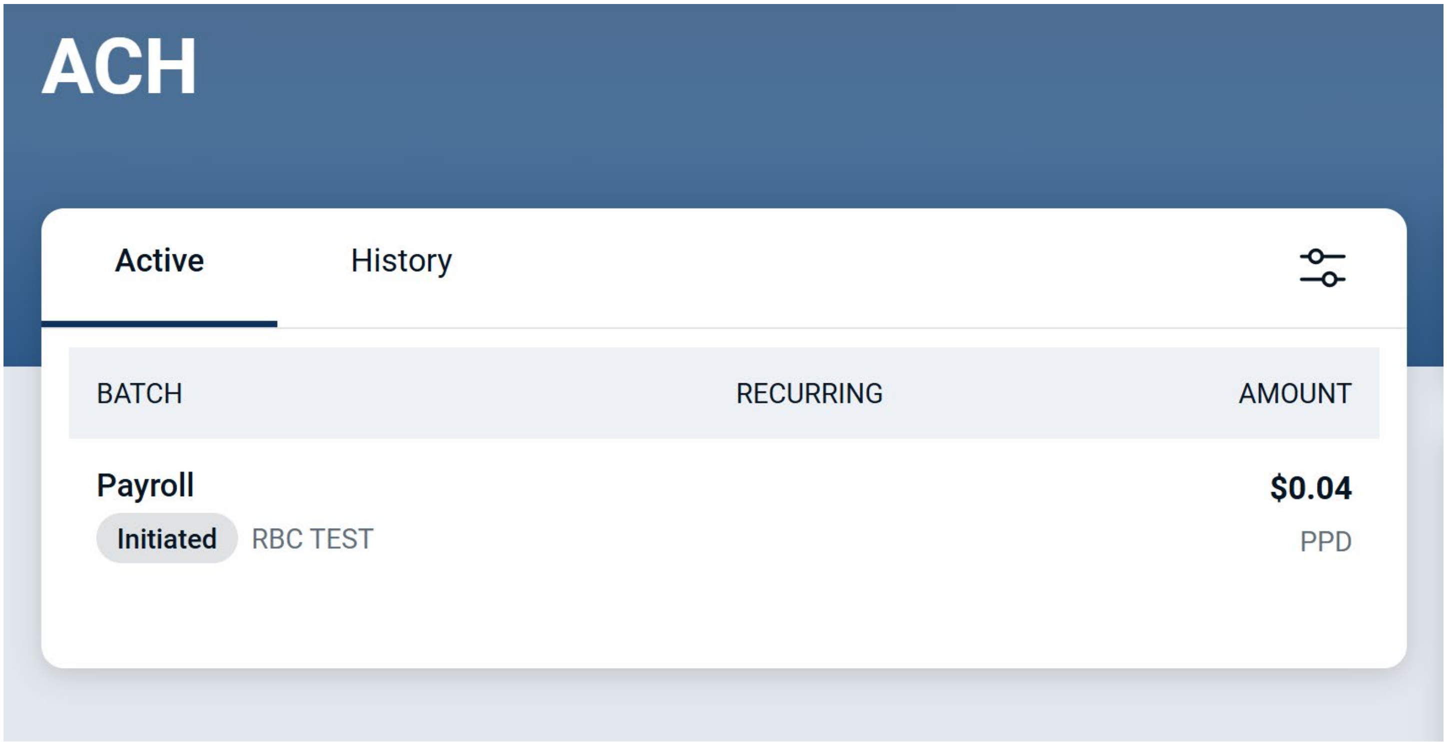
Step 1

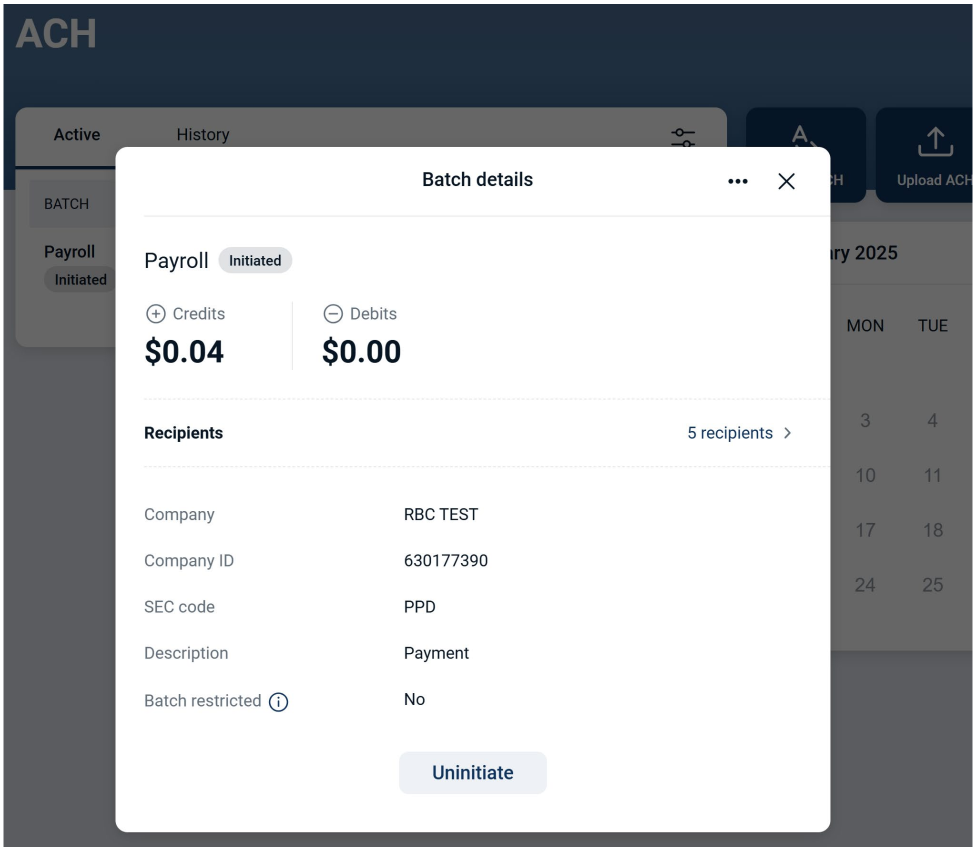
Select **ACH** from the navigation pane.
Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

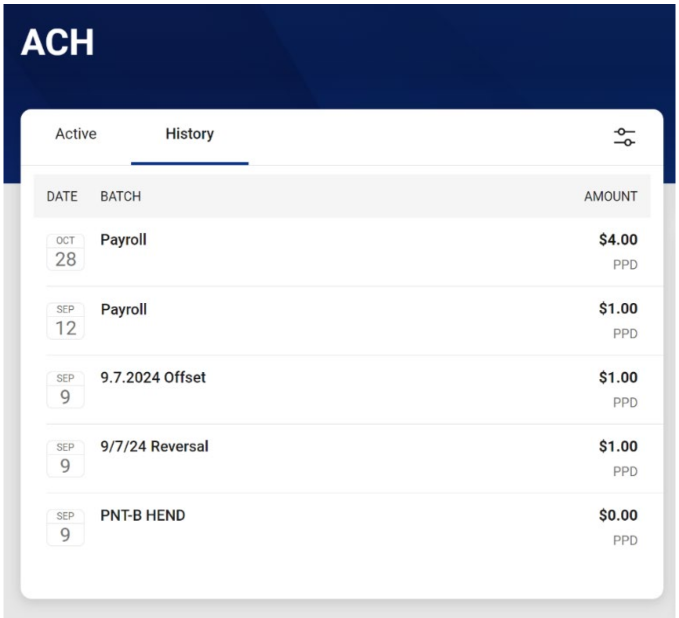
Select the batch in an Initiated status, click **Uninitiate**, and confirm.
The payment will return to a **Ready** status and will not process.





History

Select this tab to review batches that have been processed.

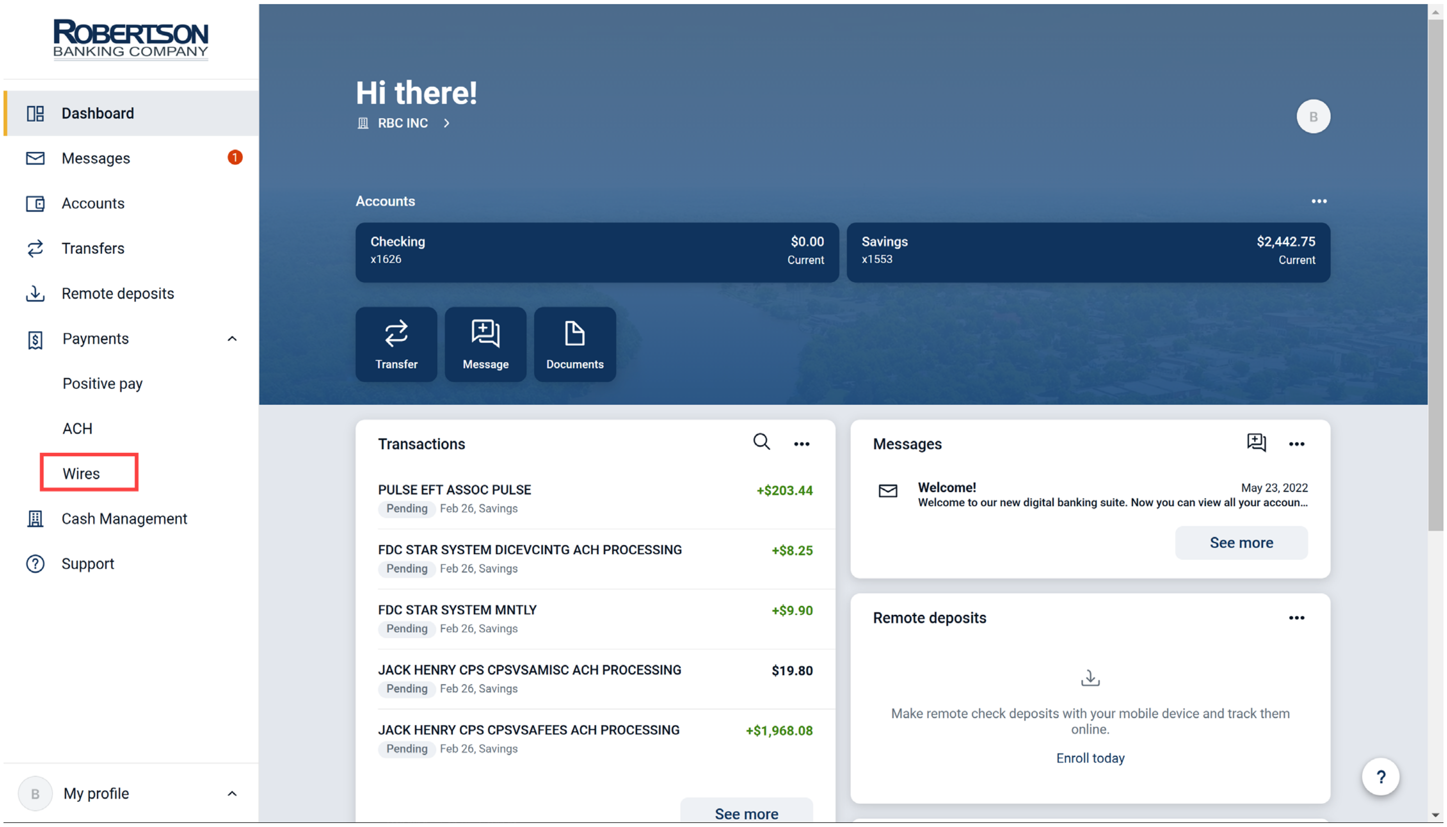


Wires

Create a Wire

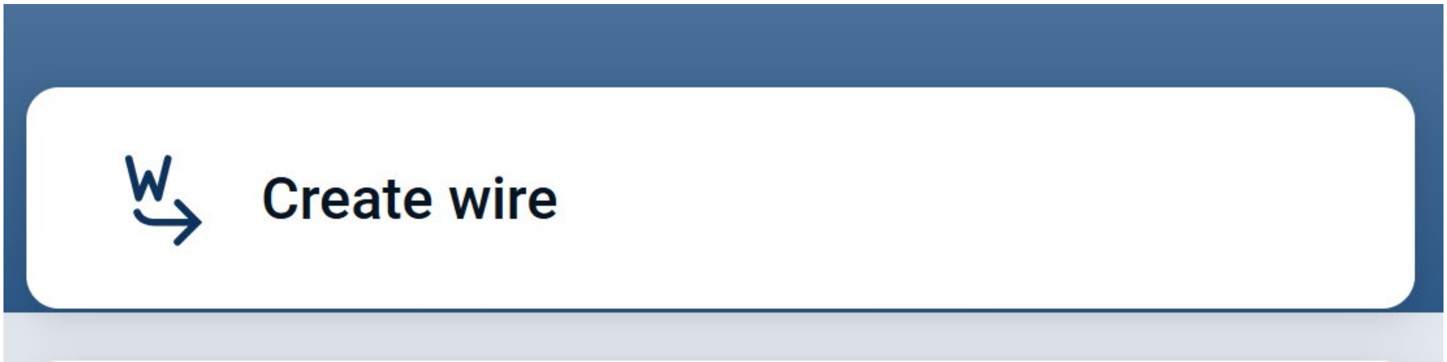
Step 1

Select **Wires** from the navigation pane.
Please note: if you have multiple payment features activated, select the **Payments** menu first.



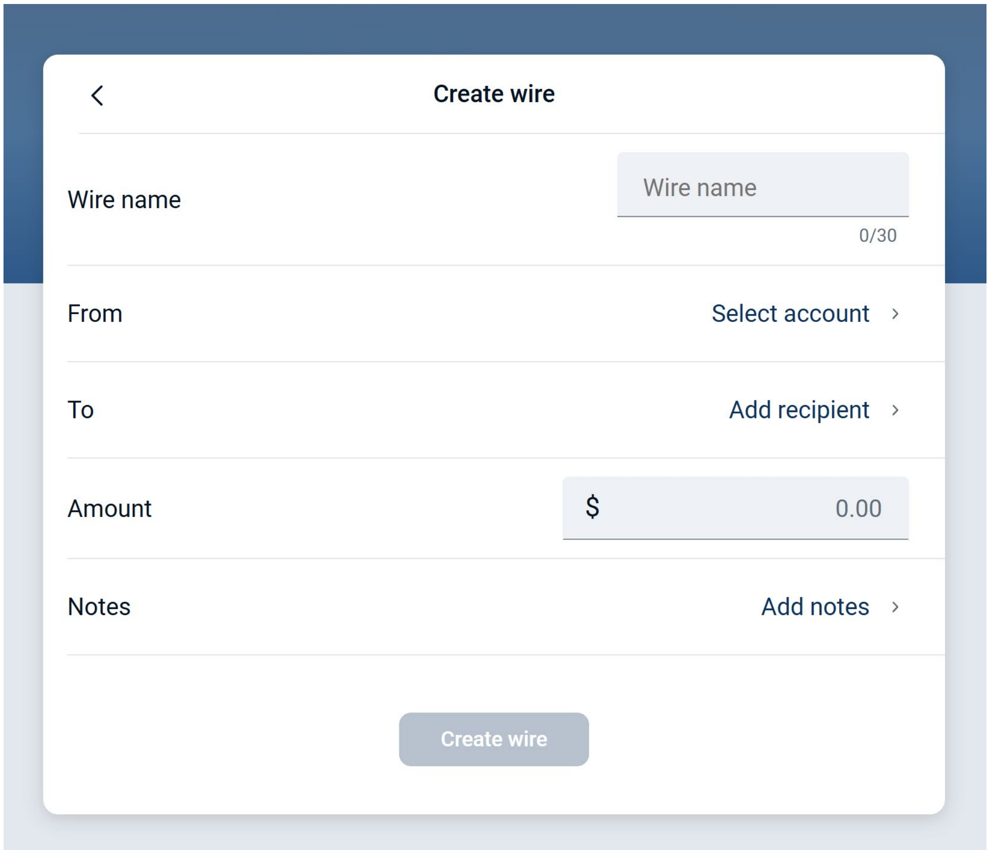
Step 2

Select **Create wire**.



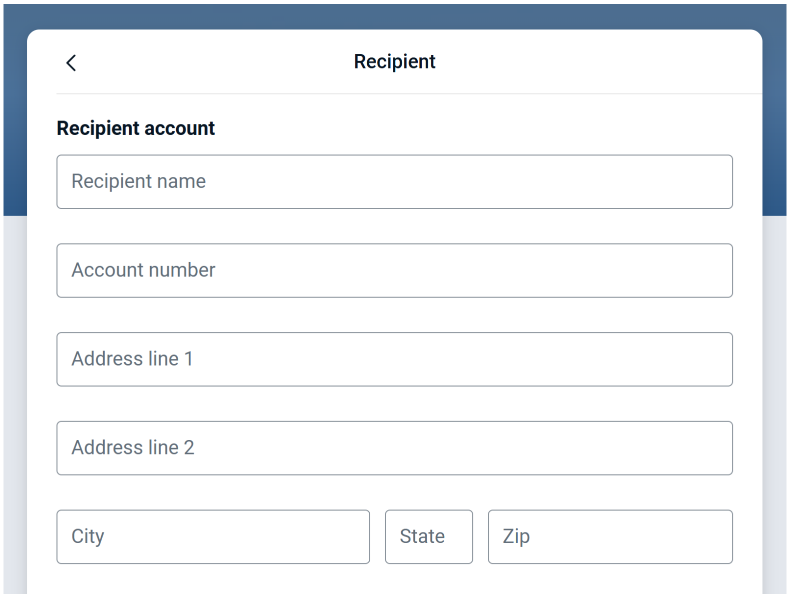
Step 3

Enter a **Wire name**, choose the account to debit the funds **From**, and click **Add recipient**.



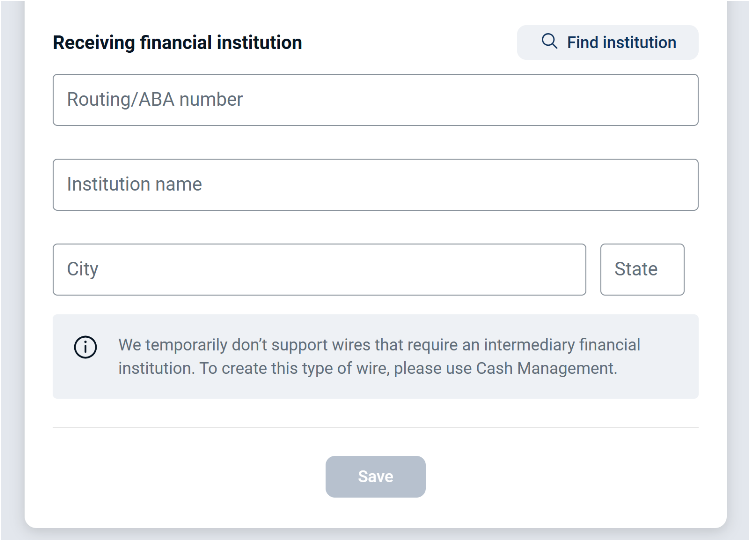
Step 4

Enter the beneficiary's name, account number, and address in the Recipient account section



Step 5

Click **Find institution** to lookup the beneficiary's financial **Institution name** then click **Save**.



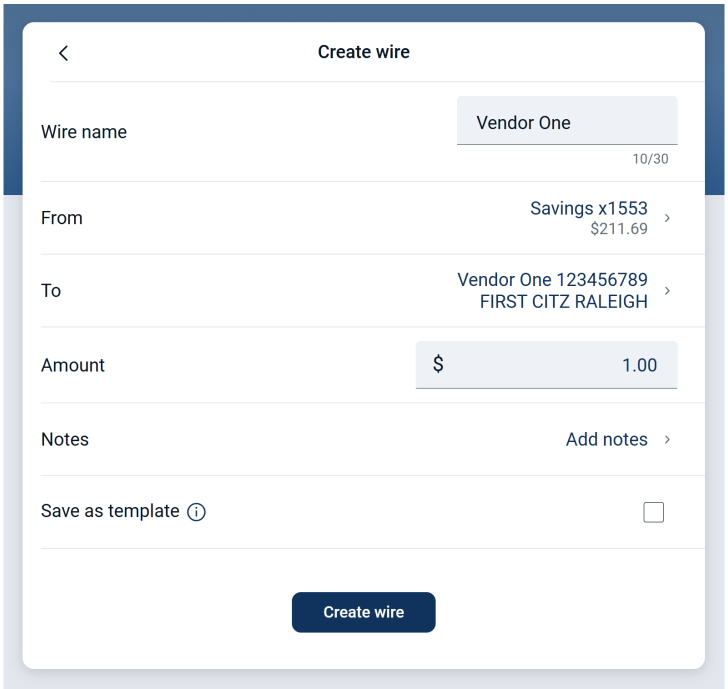
Step 6

Enter the amount of the wire and add any notes that should accompany the wire if applicable.

If you anticipate sending this wire again in the future, click **Save** as template to retain the information under the Templates tab.

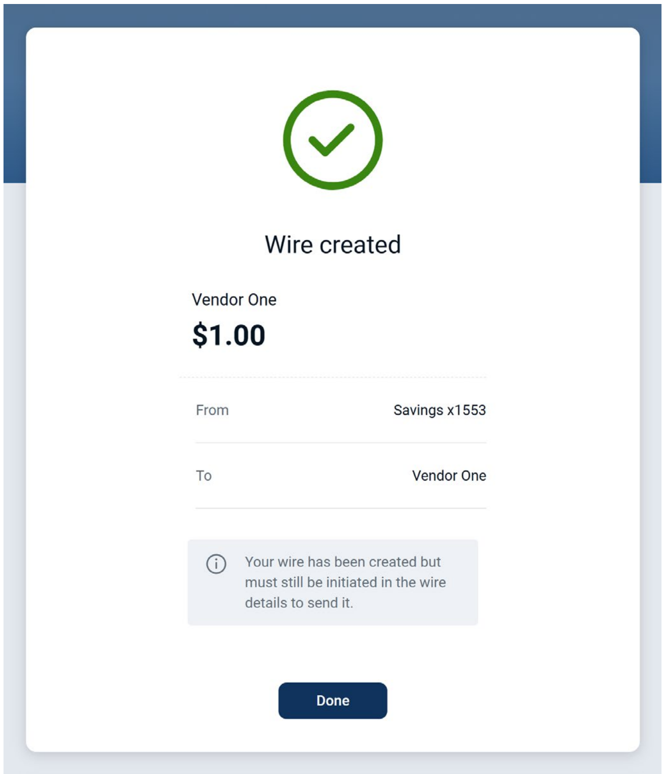
Please note: if you wish to send a recurring wire, it must be saved as a template first.

Click **Create wire.**



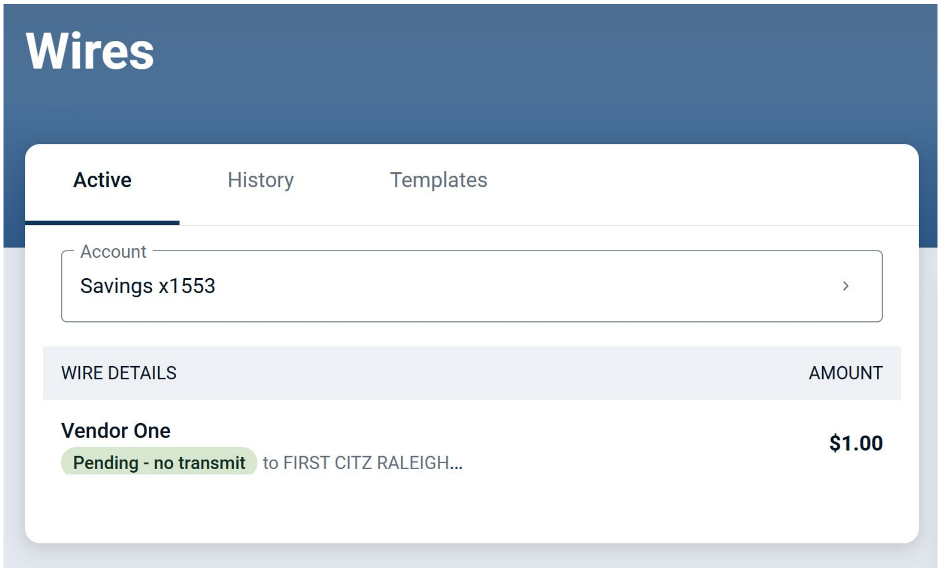
Step 7

Review your confirmation message and click **Done**.



Step 8

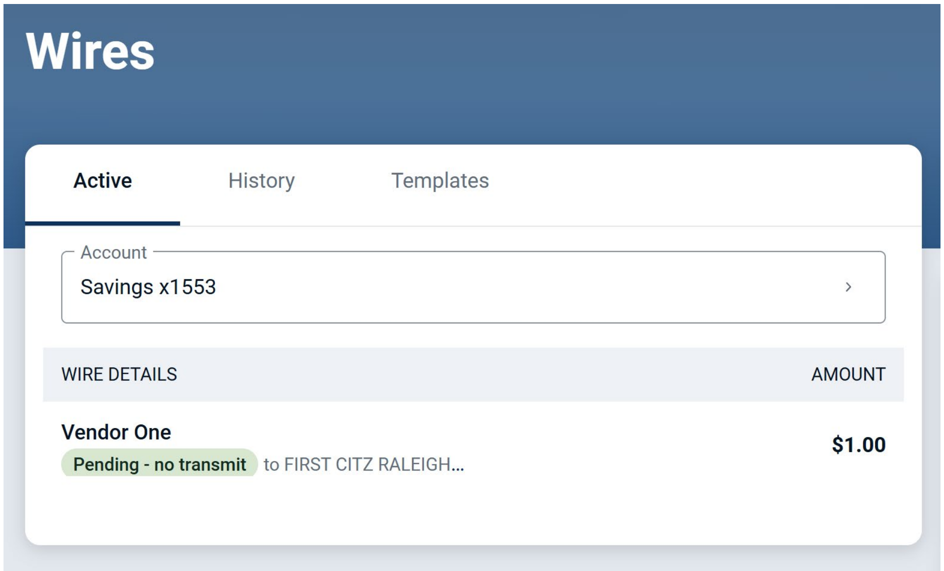
Your wire will appear under the **Active** tab in a **Ready** status.
If you saved the wire as a template, it will appear under the Templates tab.



Edit or Delete a Wire

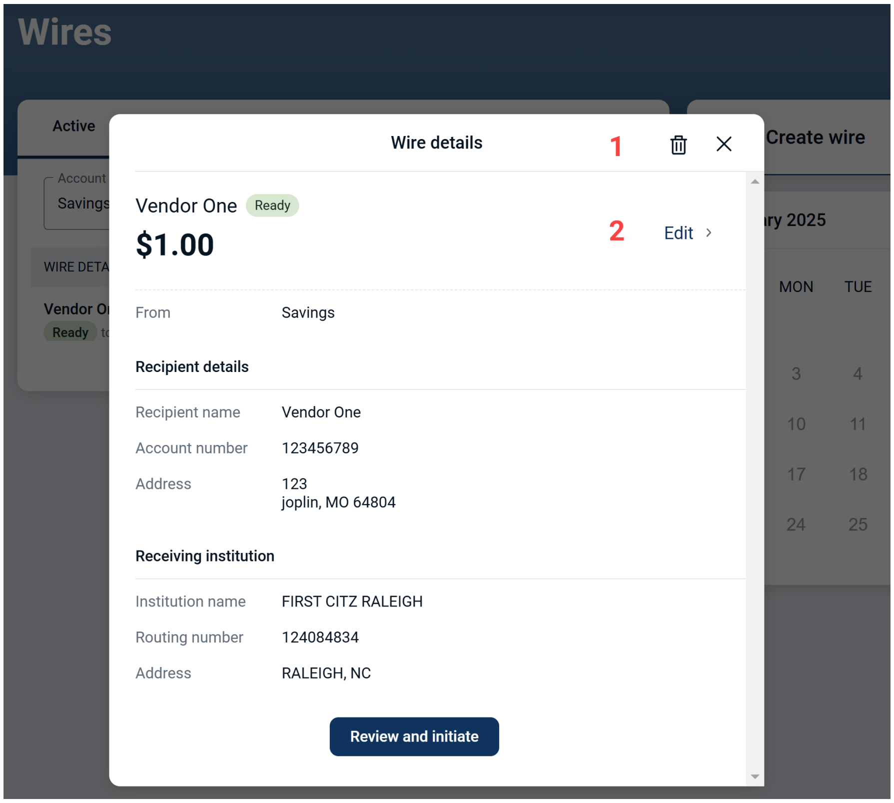
Step 1

Select the wire under the **Active** or **Templates** tab.



Step 2

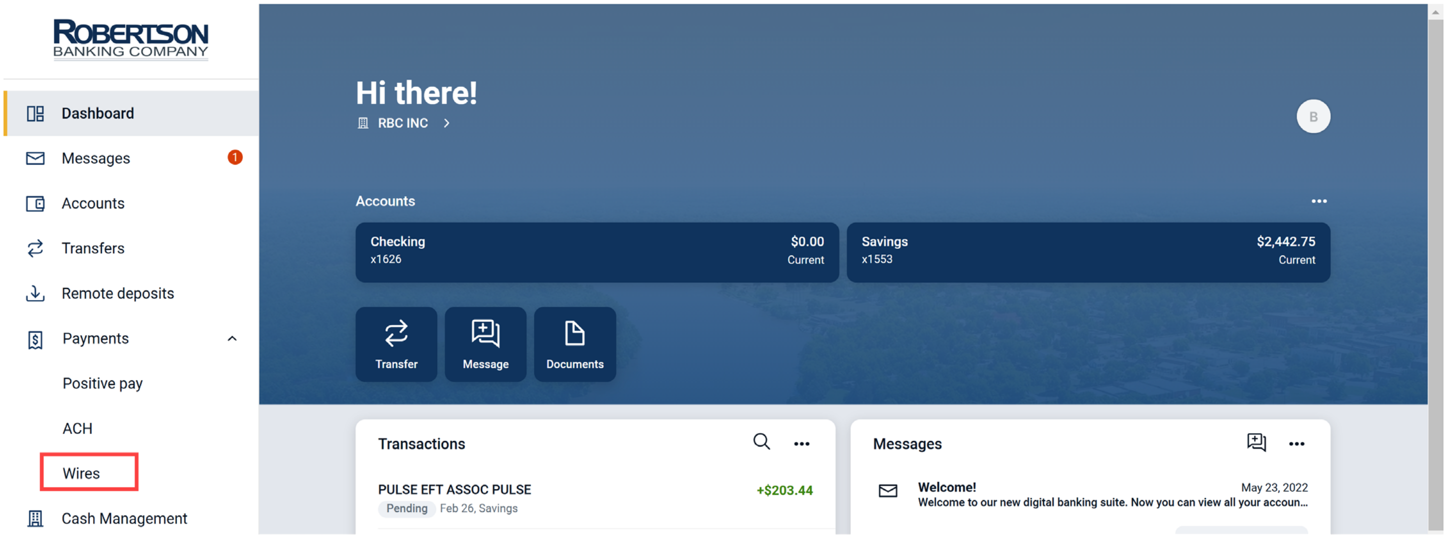
1. Click the ellipsis icon to delete the wire
2. Click Edit to change the wire name, beneficiary information, amount, or notes.



Initiate a Wire

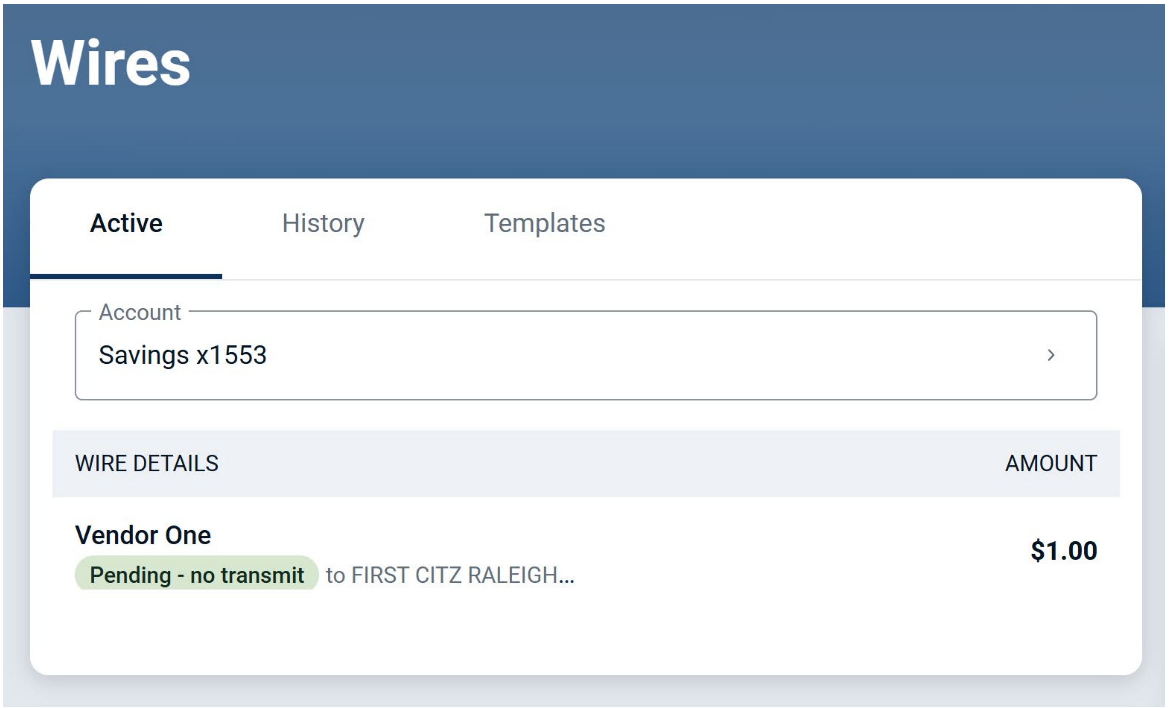
Step 1

Select **Wires** from the navigation pane.
Please note: If you have multiple payment features activated, select the **Payments** menu first.



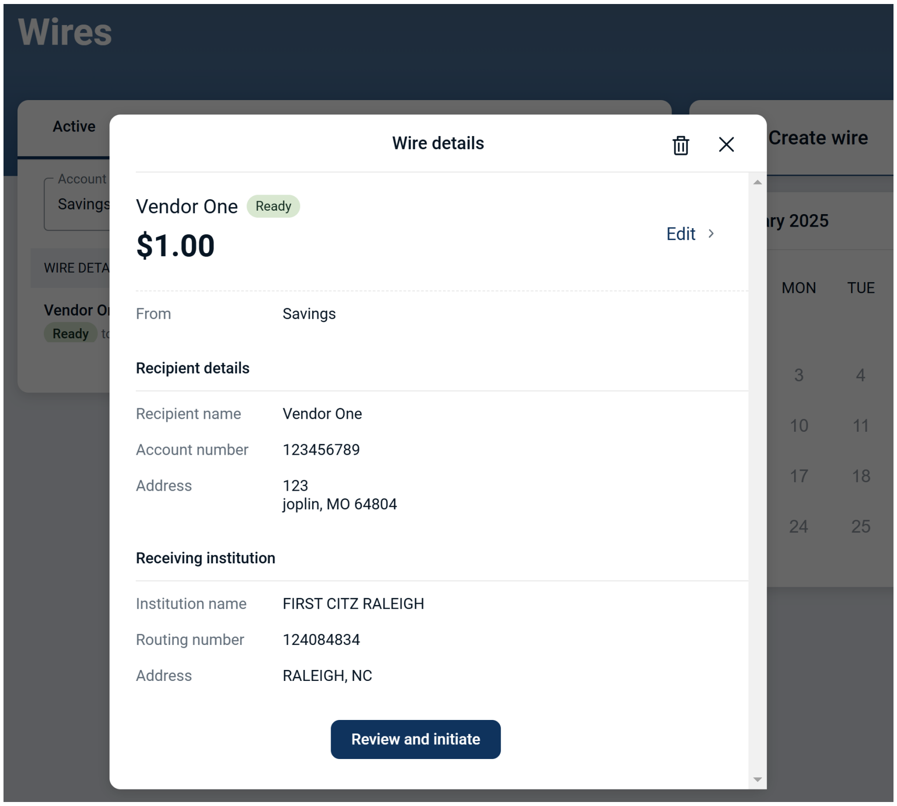
Step 2

Select the wire from under the **Active** or **Template** tab.



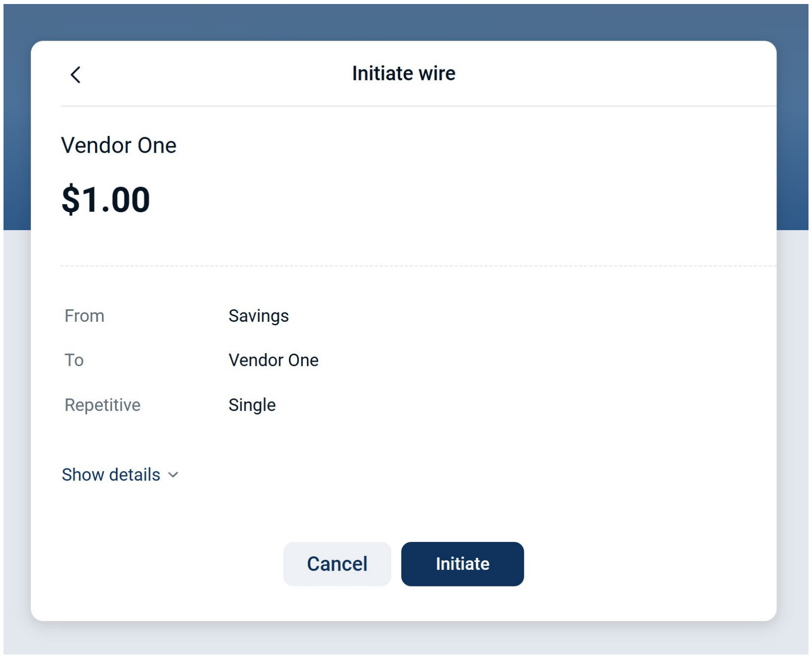
Step 3

Click **Review and initiate**.



Step 4

Review the wire details. If initiating a template, choose a recurring frequency if applicable. Click **Initiate**. You may be prompted to authenticate by entering your password.

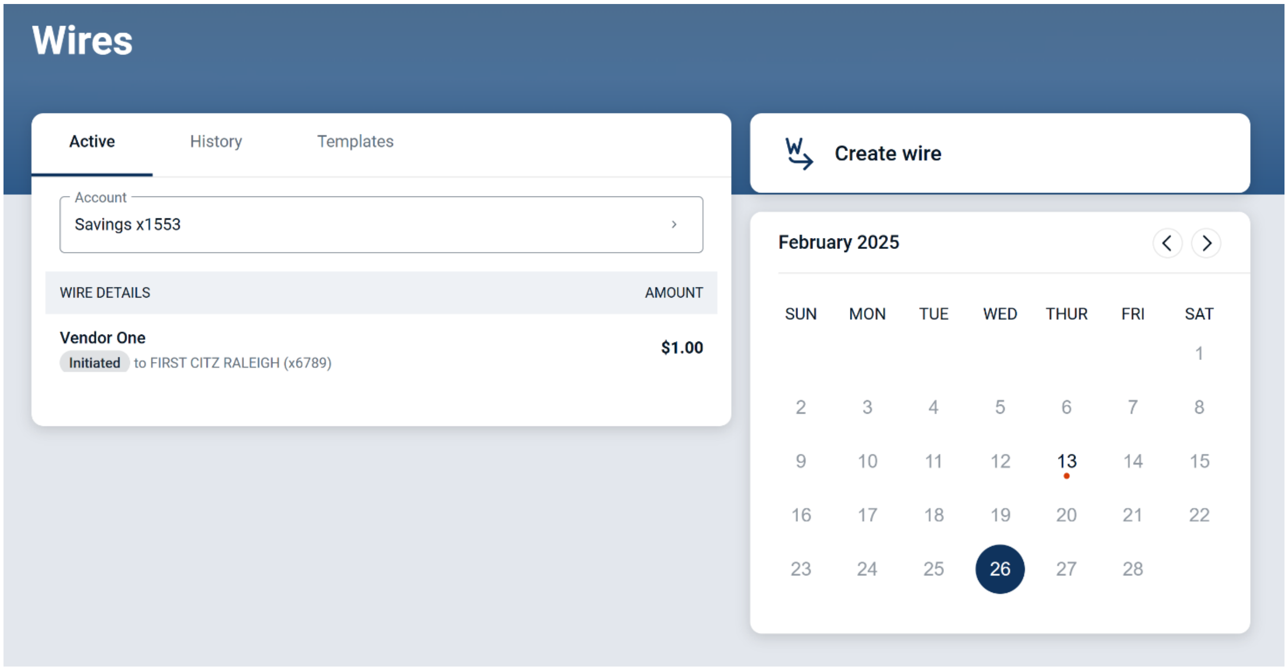


Step 5

Review your confirmation and click **Done**.

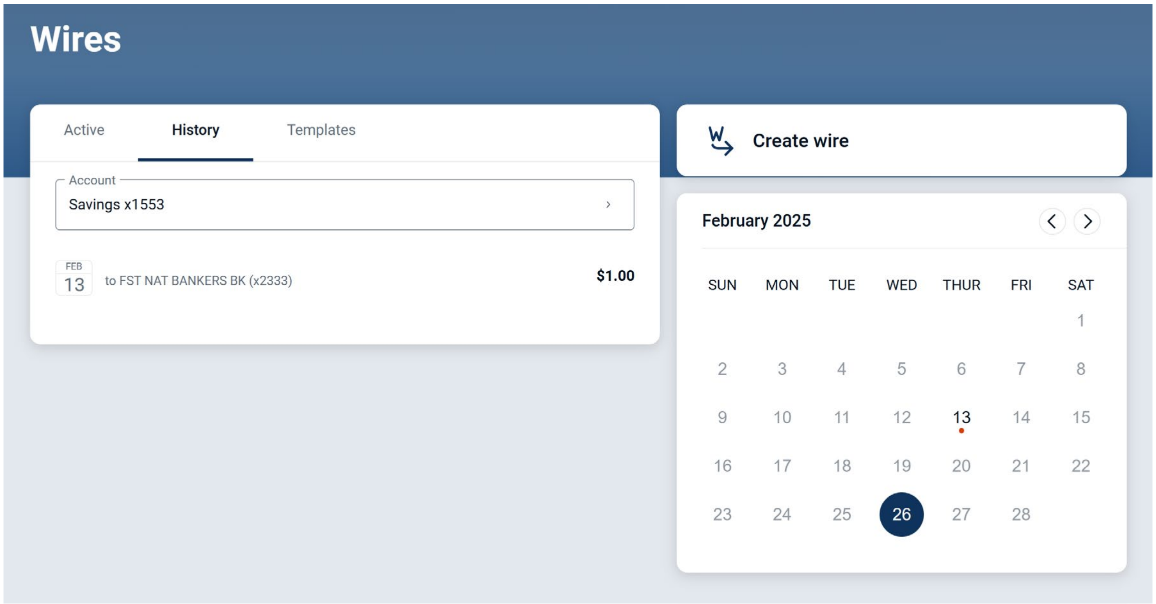
Step 6

Your wire will appear under the **Active** tab in an Initiated status.



History

Select this tab to review wires that have been processed.

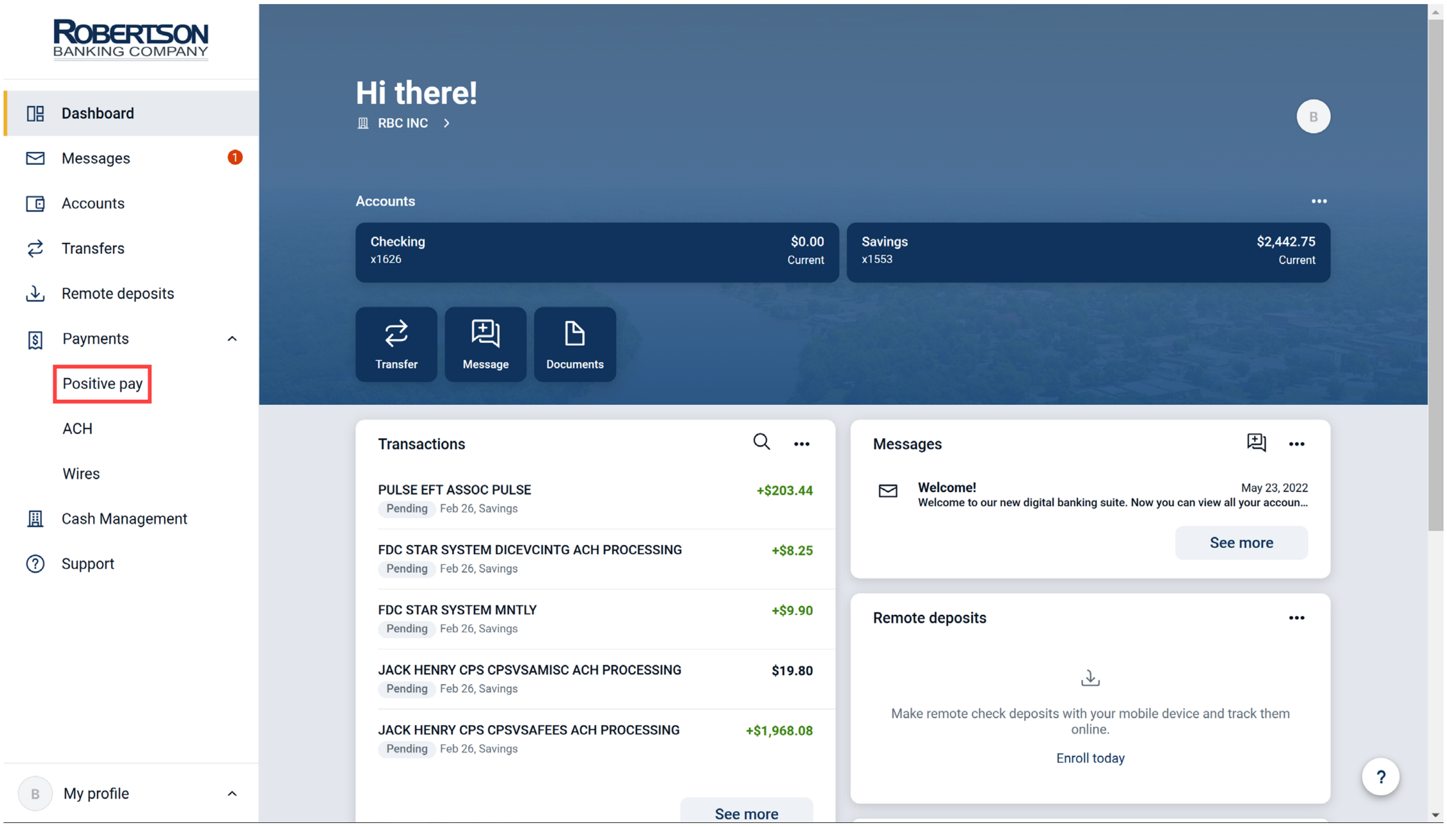


Positive Pay

Enter Issued Items Manually

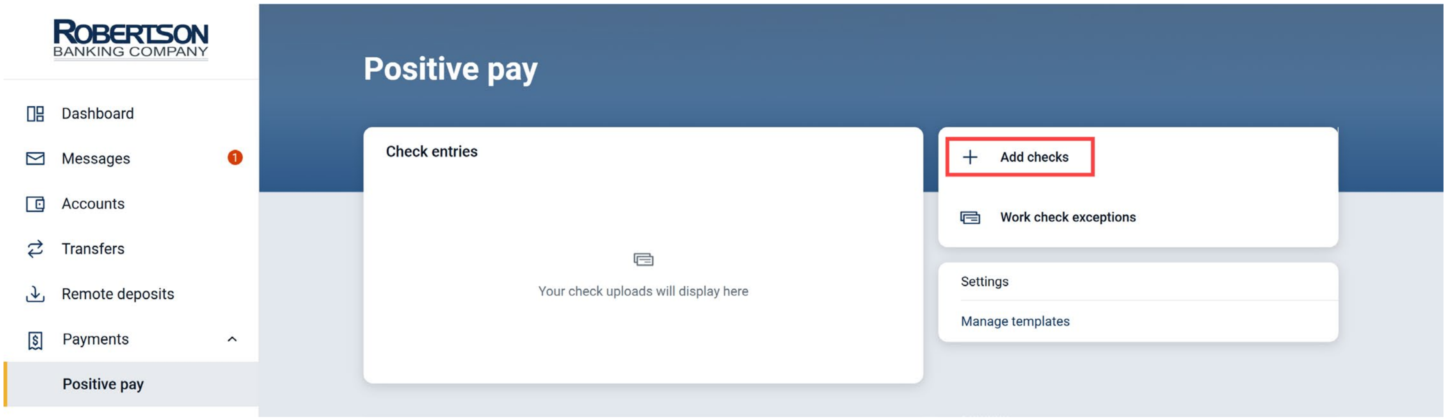
Step 1

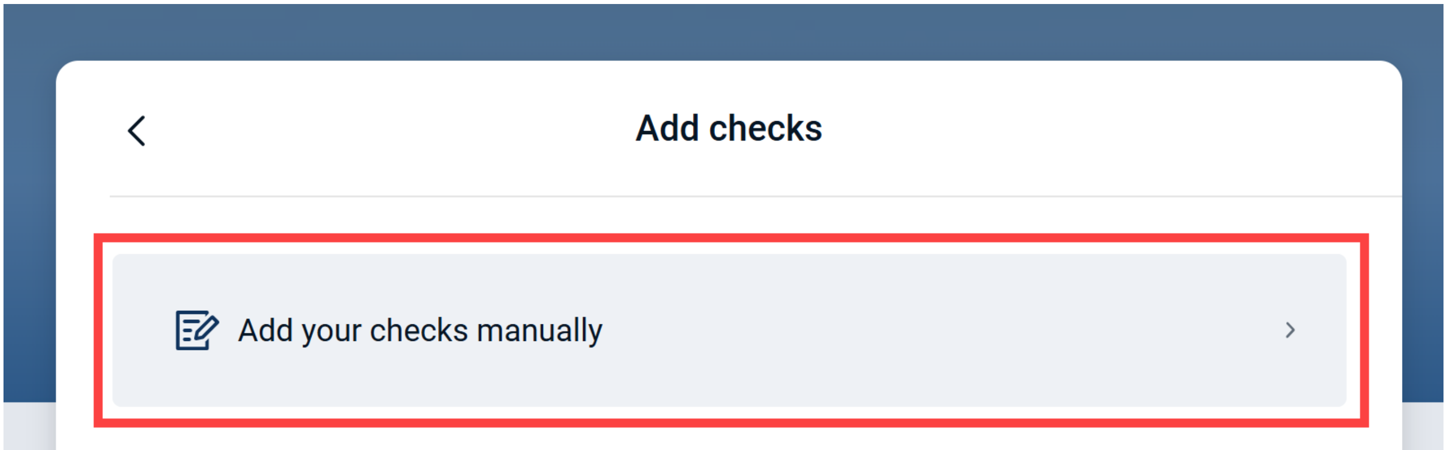
Select **Positive Pay** from the navigation pane.
Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

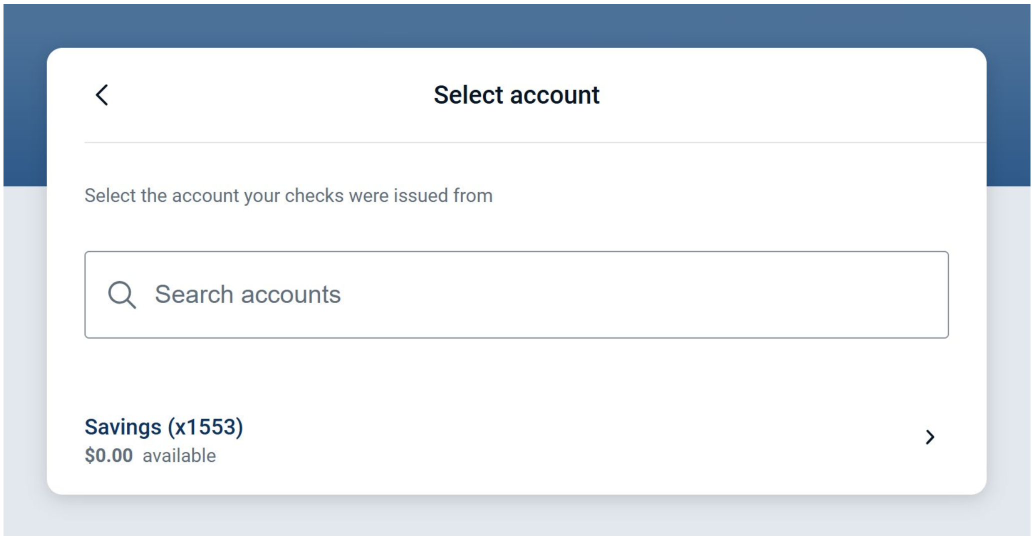
Click **+ Add checks** and select **Add your checks manually.**





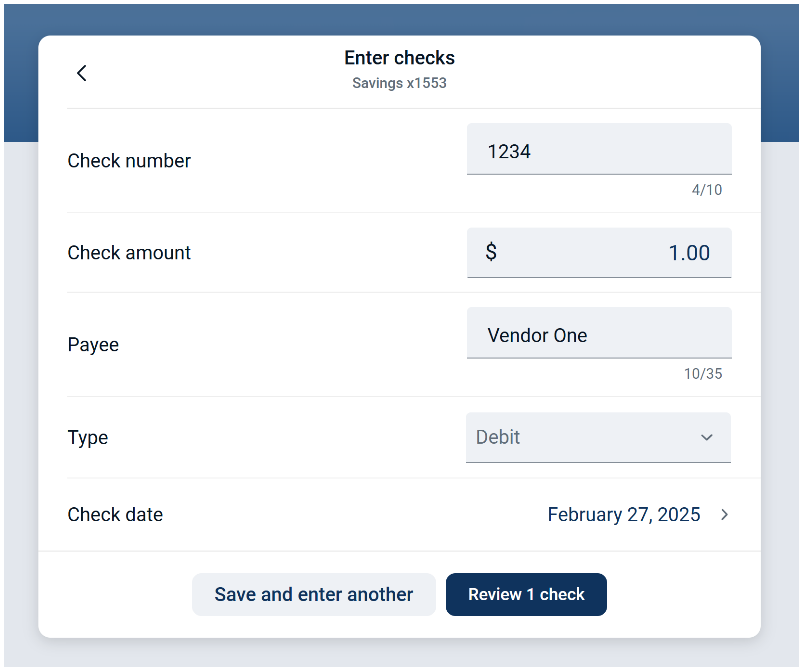
Step 3

Select the account the checks were written against.



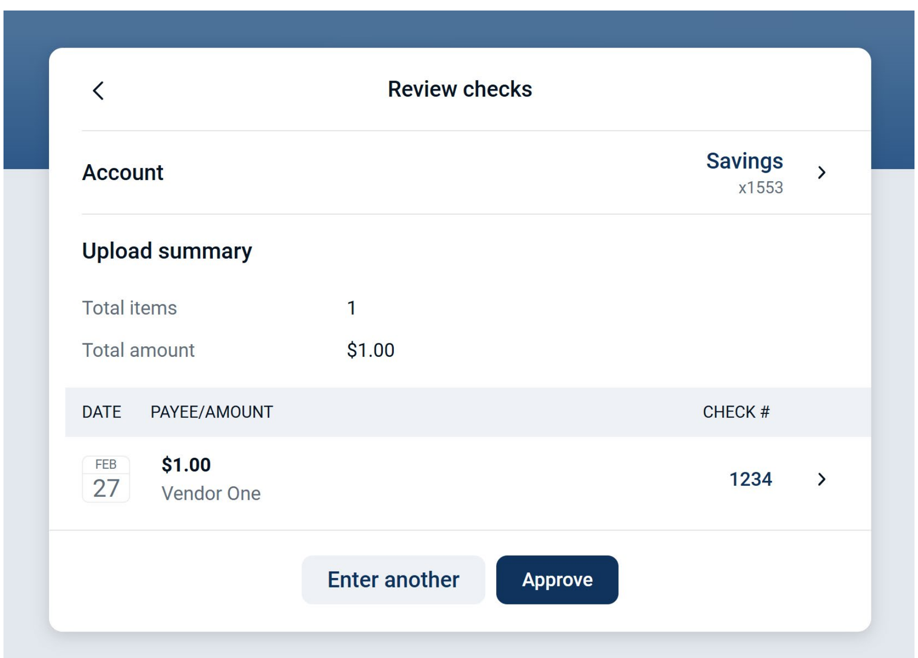
Step 4

Enter the **Check number**, **Check amount**, **Payee**, **Type**, and **Check date**.
For check **Type**, select **void** to invalidate a previously entered issued item.
Click **Save and enter another** if you have more checks or click **Review** if done.



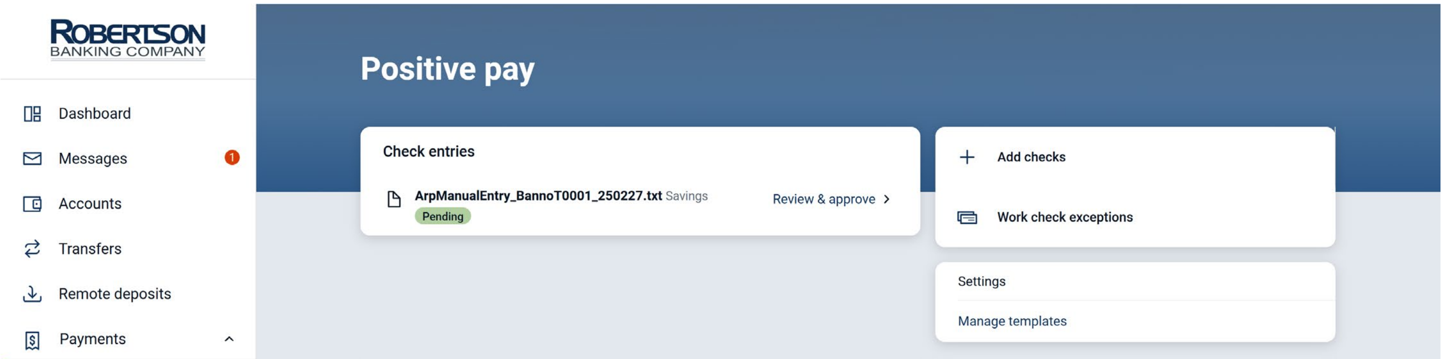
Step 5

Review the details you entered and click **Approve** to continue. Click **Approve** to confirm. Review the confirmation and click **Done**.



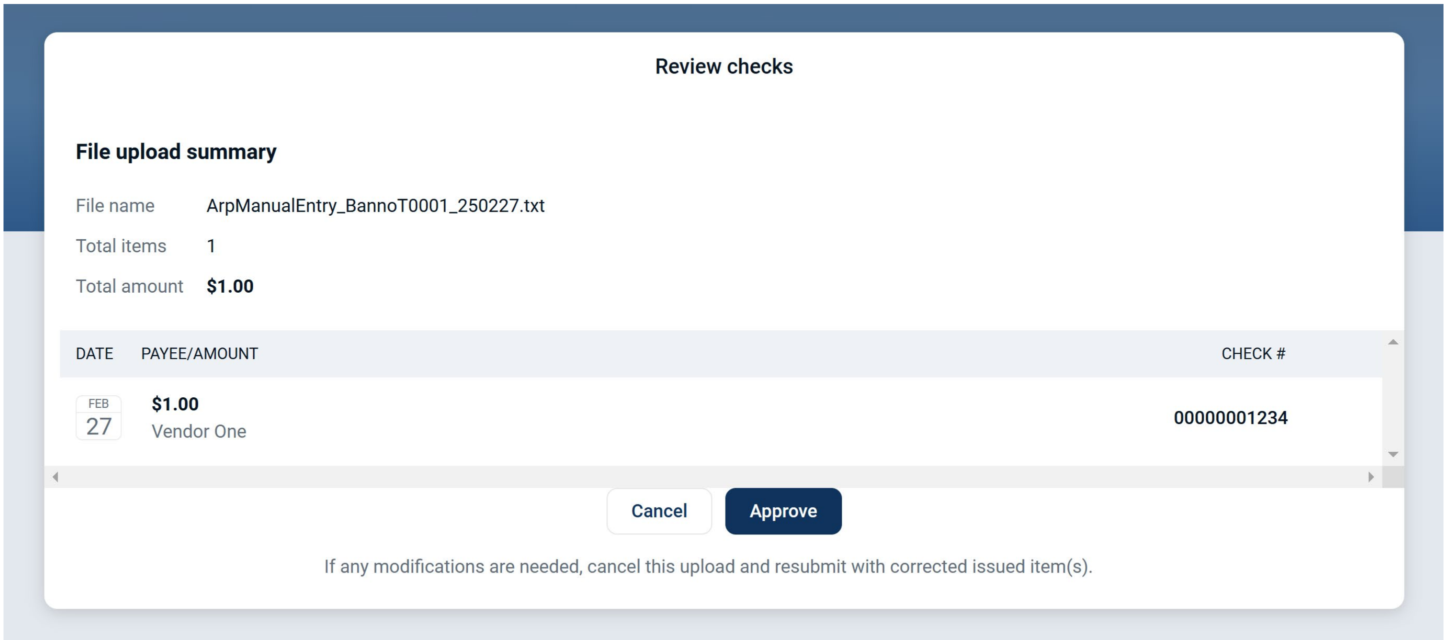
Step 6

Your check file will appear on the **Positive Pay** dashboard in a **Pending** Status. Click **Review & approve**.



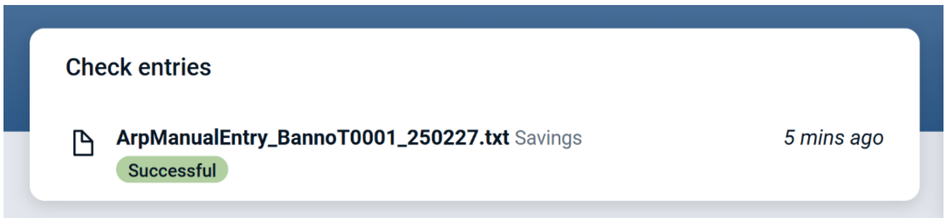
Step 7

Review the details and click **Approve**.
Review the confirmation and click **Done**.



Step 8

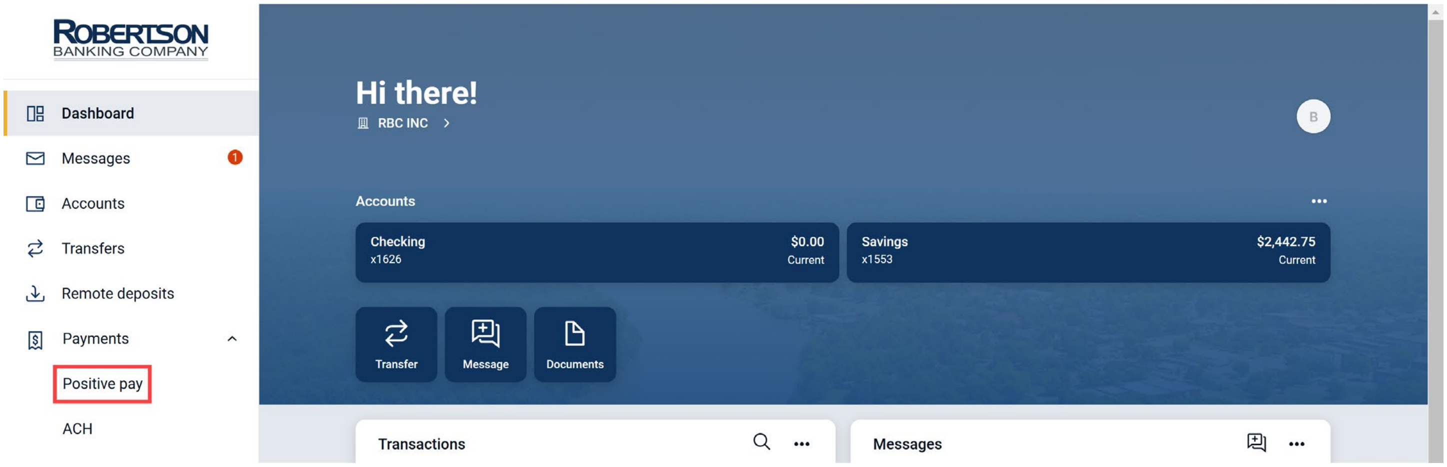
The issued items file status will now show as **Successful**.



Create an Issued Items Upload Format

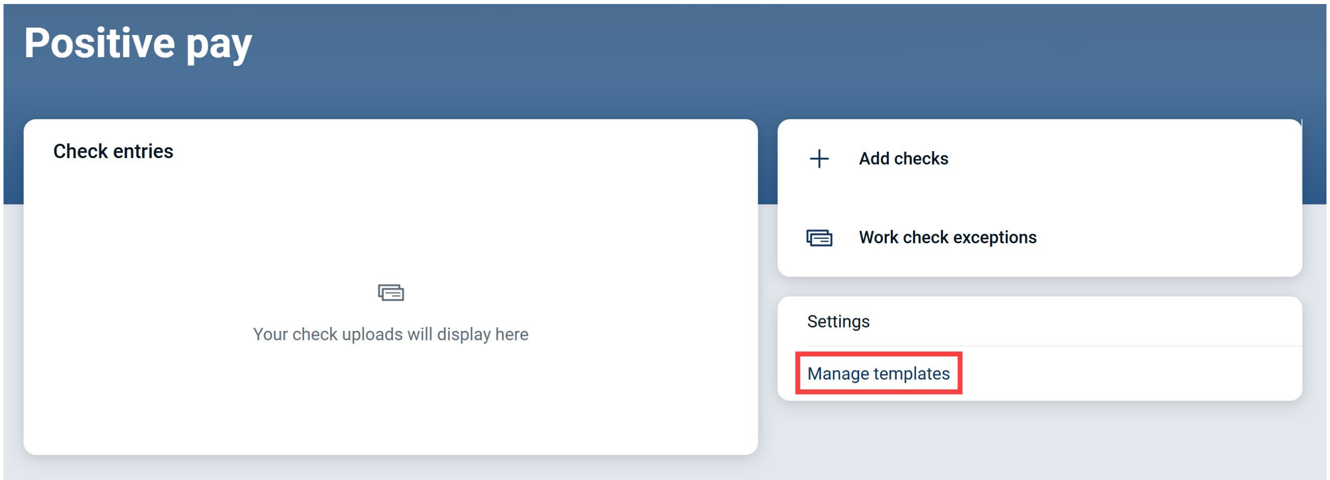
Step 1

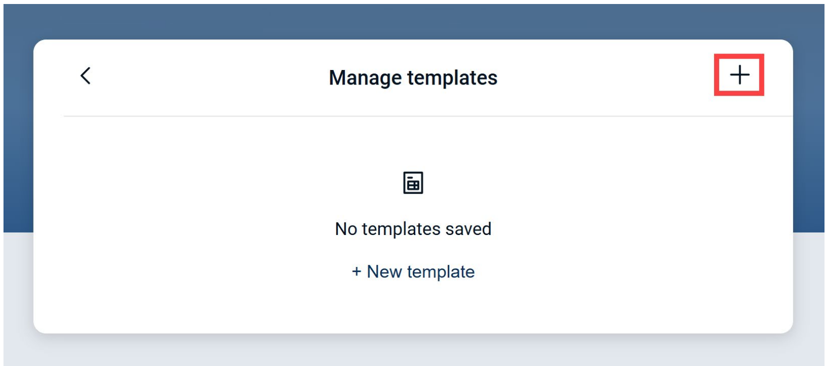
Select **Positive Pay** from the navigation pane.
Please note: If you have multiple payment features activated, select the **Payments** menu first.



Step 2

Click **Manage templates** and click the **+** sign.





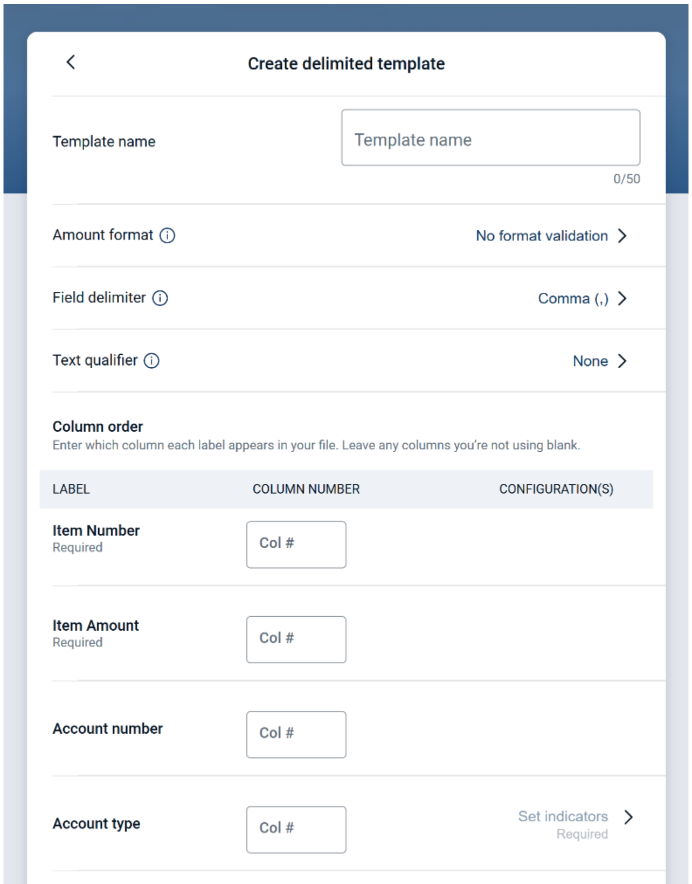
Step 3

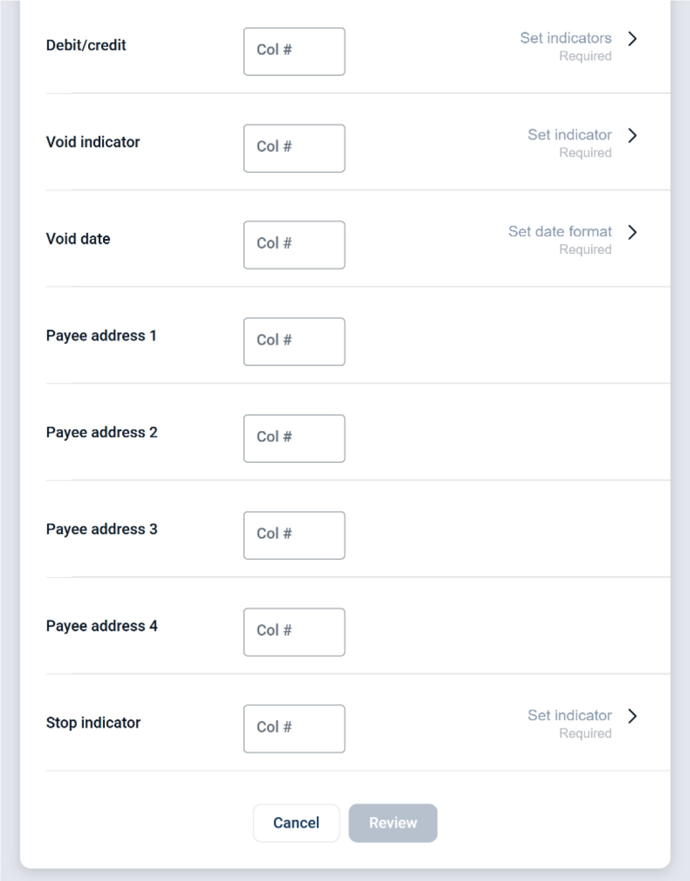
Select the format of your file.

Delimited:

1. Enter a name for this upload format.
2. Choose your amount format, field delimiter and text qualifier.
3. Enter the column number from your file into the corresponding field. Leave any columns you're not using blank. **Please note:** Some fields may require additional configuration. Click the arrow to adjust those fields.

Click **Review** and then **Save**. Click **Done**.

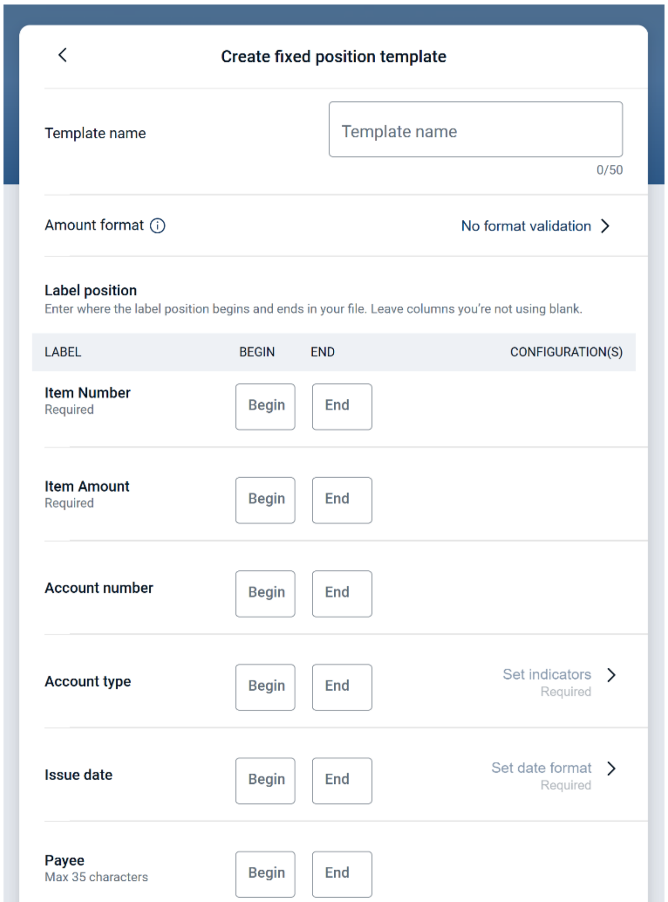


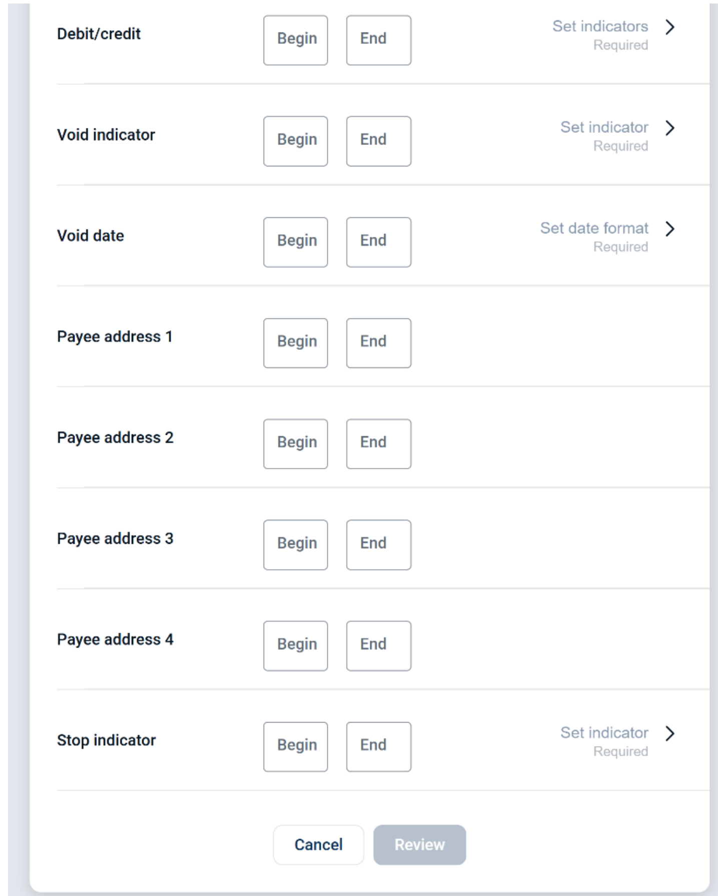


Fixed Position:

1. Enter a name for this upload format.
2. Choose your amount format.
3. Enter where each label starts and ends in your file. For example, if the item number is the first six characters in your file, the beginning number would be 1 and the end would be 6.

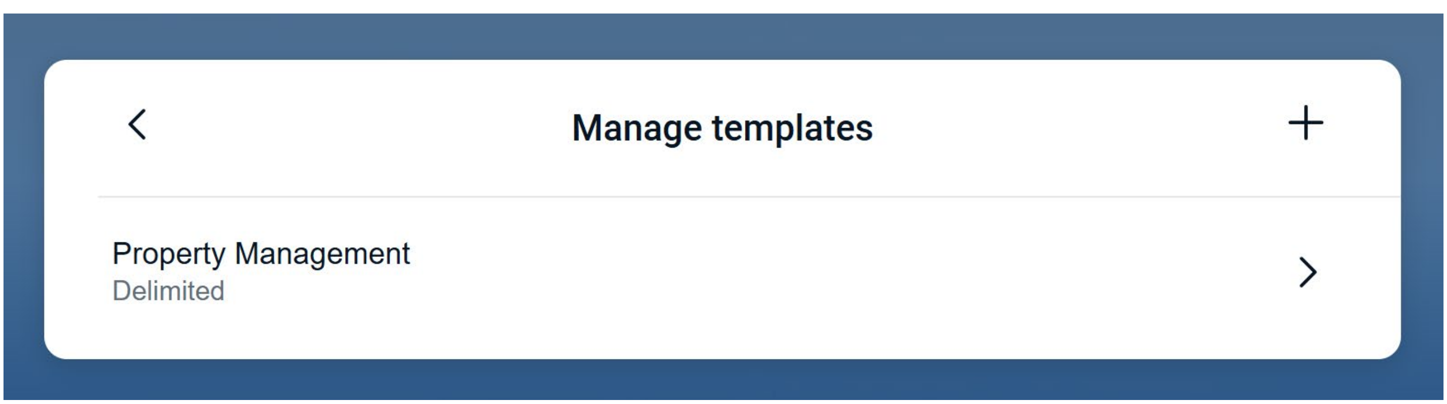
Click **Review** and then **Save**. Click **Done.**





Your upload template will be listed under the **Manage Templates** page and can be edited or deleted at any time.

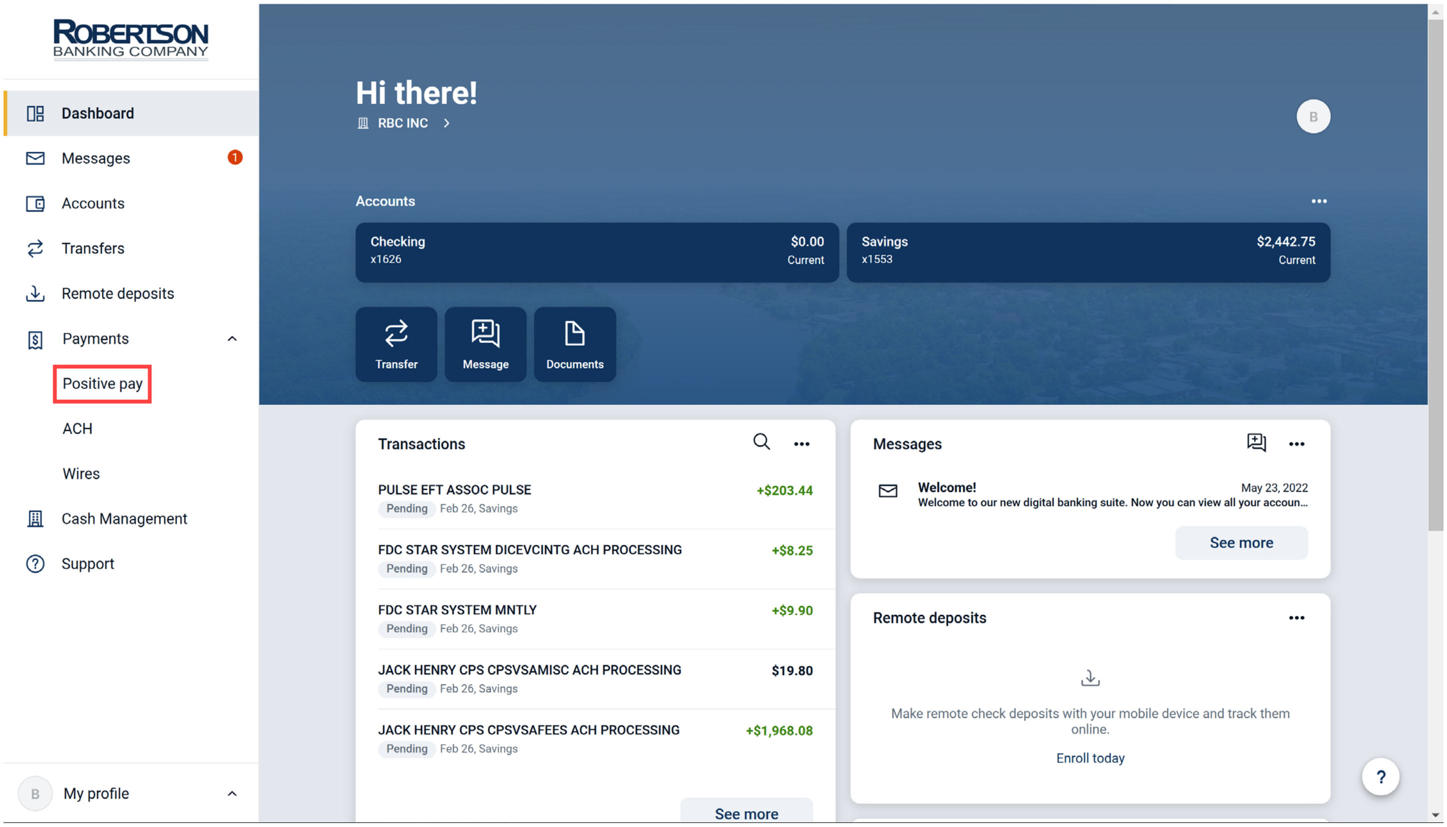
Click the **+** to add more template if necessary.



Upload an Issued Items File

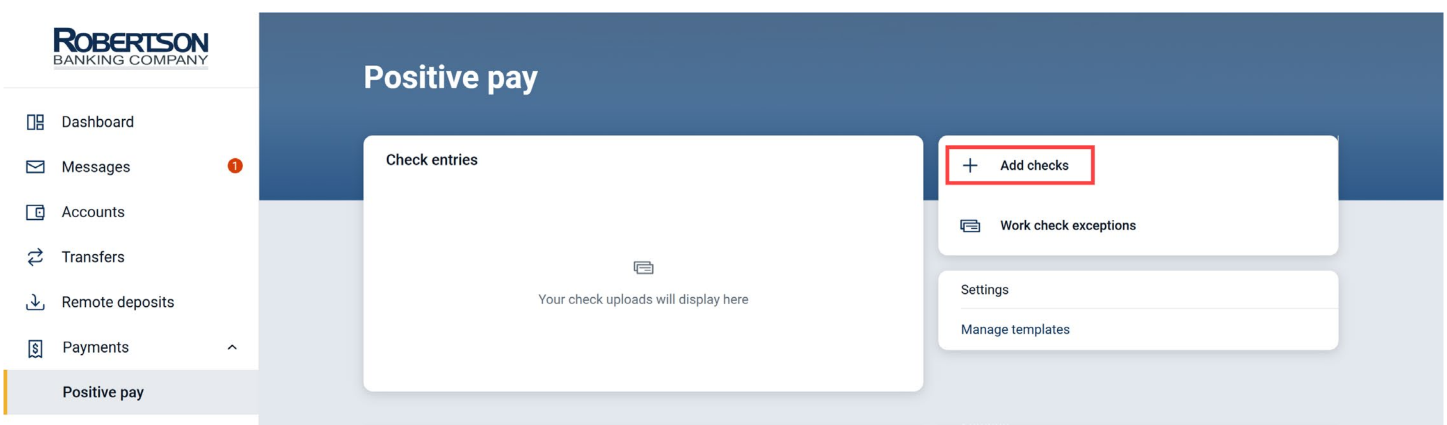
Step 1

Select **Positive Pay** from the navigation pane.
Please note: If you have multiple payment features activated, select the **Payments menu** first.



Step 2

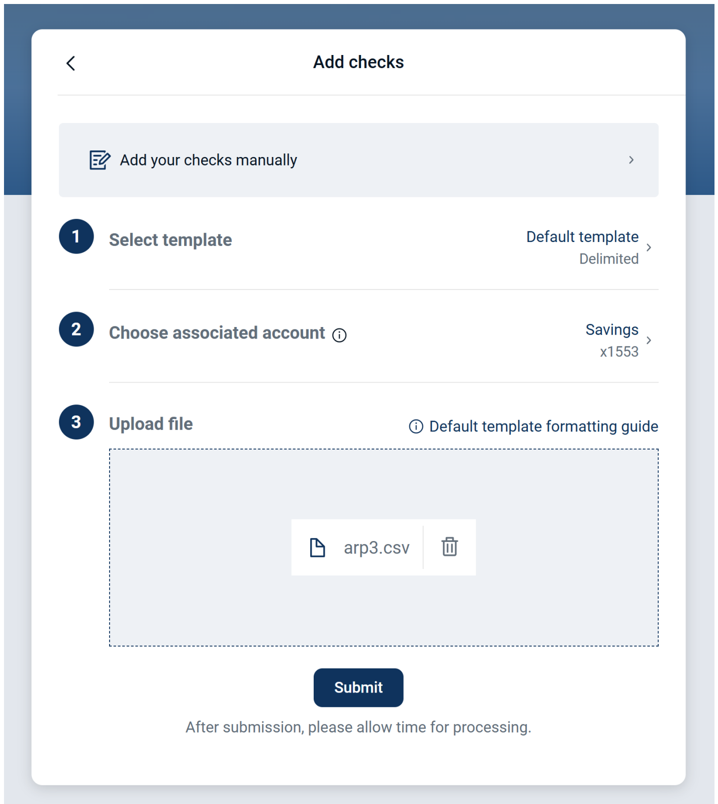
Click **+ Add checks.**



Step 3

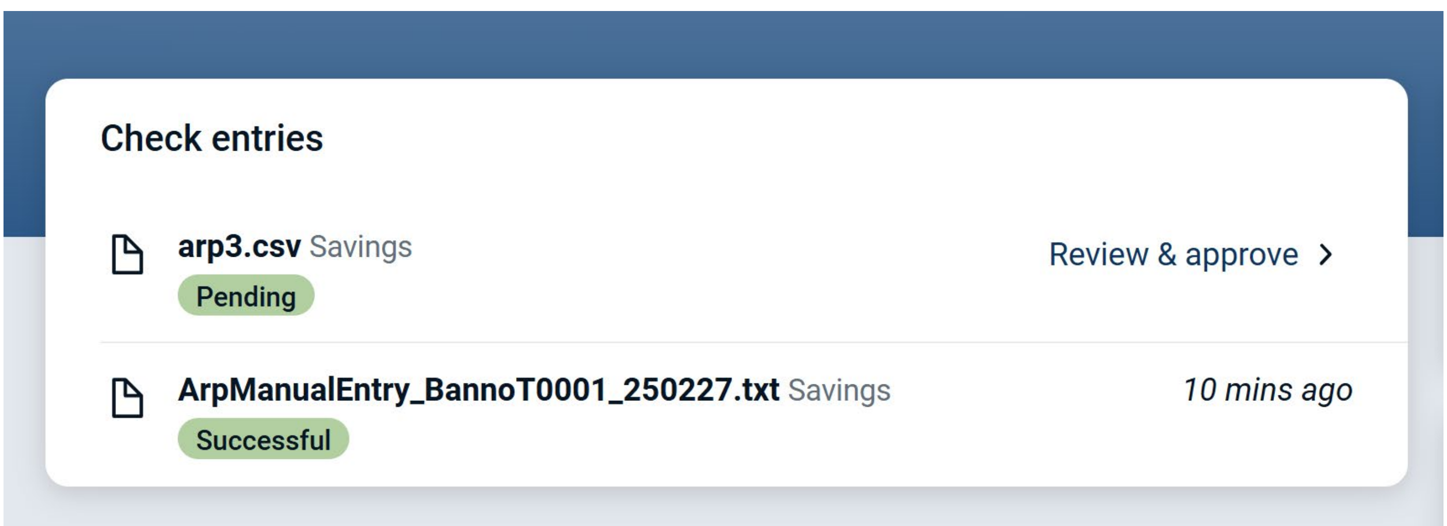
Choose your upload format template.

1. Select the account the checks were written against.
2. Browse for your issued items file.
3. Click **Submit**.



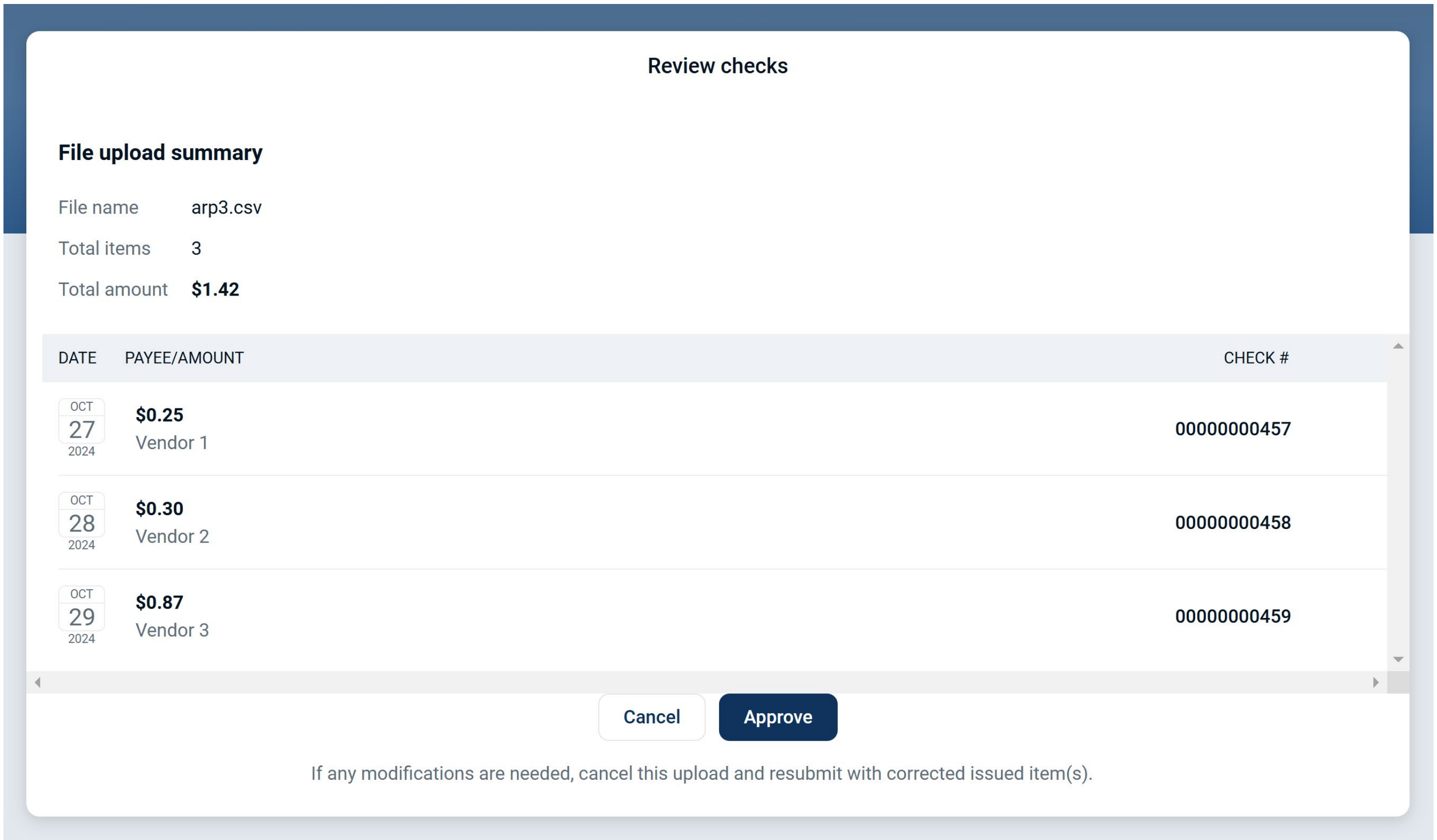
Step 4

Your uploaded file will appear on the Positive Pay dashboard in a **Pending** status. Click **Review & approve**.



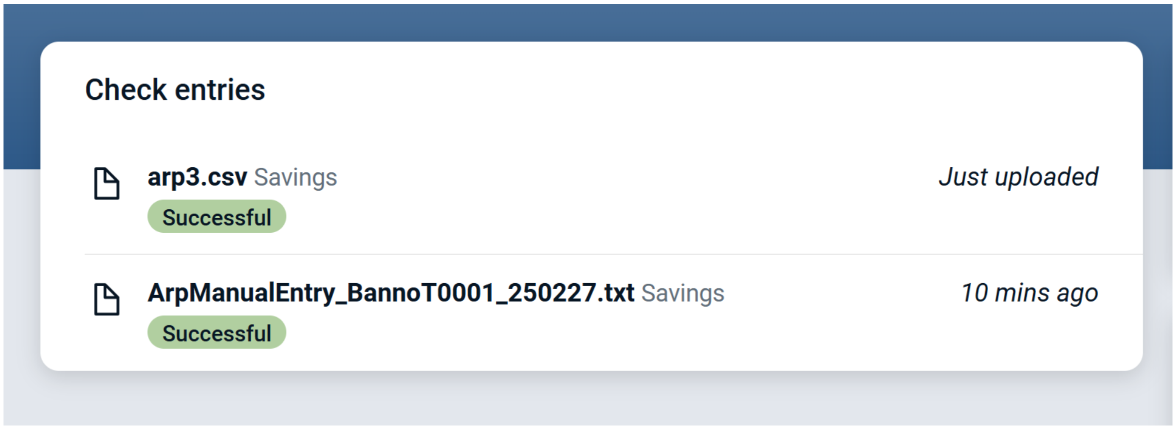
Step 5

Review the details and click **Approve**.
Review the confirmation and click **Done**.



Step 6

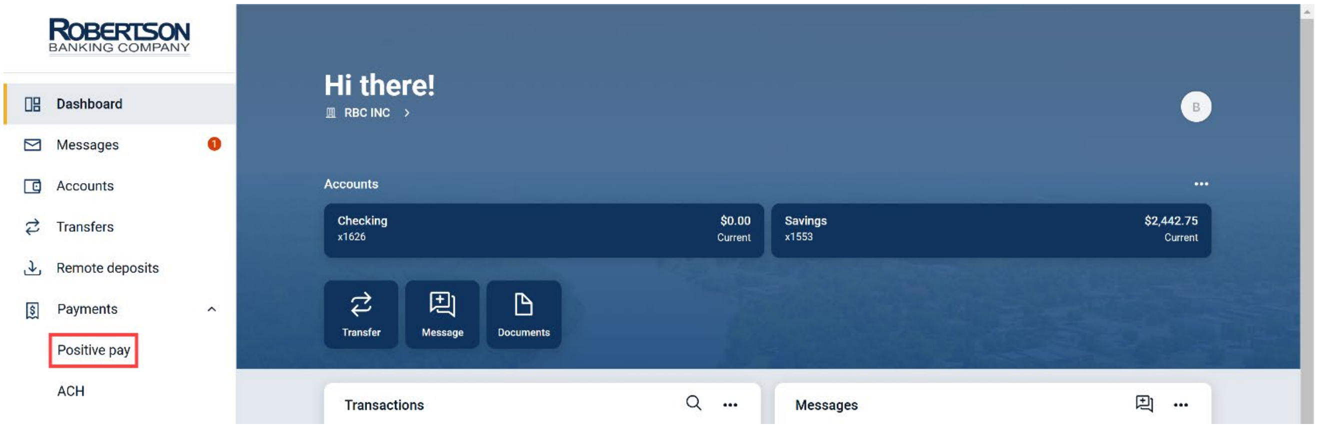
The issued items file status will now show **Successful**.



Work Exception Items

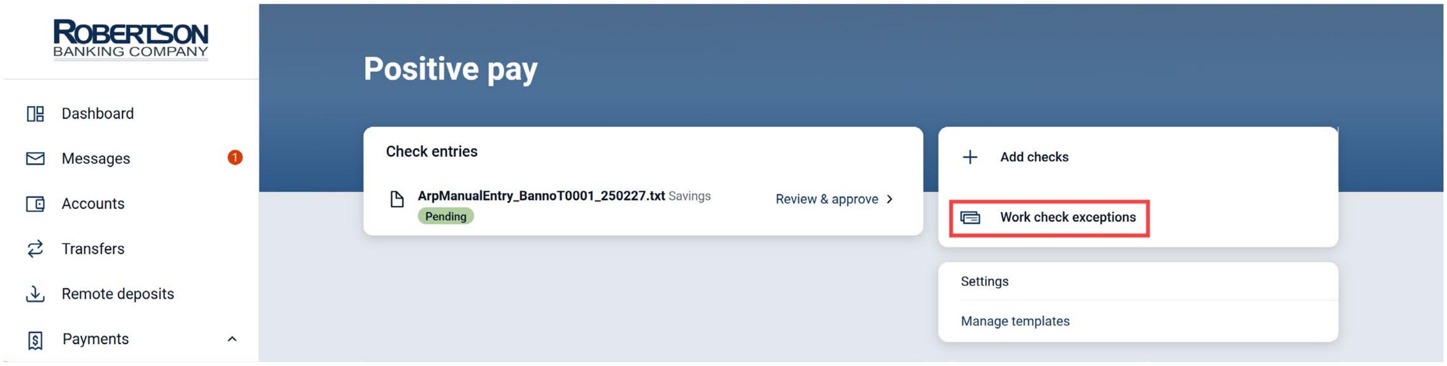
Step 1

Select **Positive Pay** from the navigation pane.
Please note: If you have multiple payment features activated, select the **Payments** menu first.



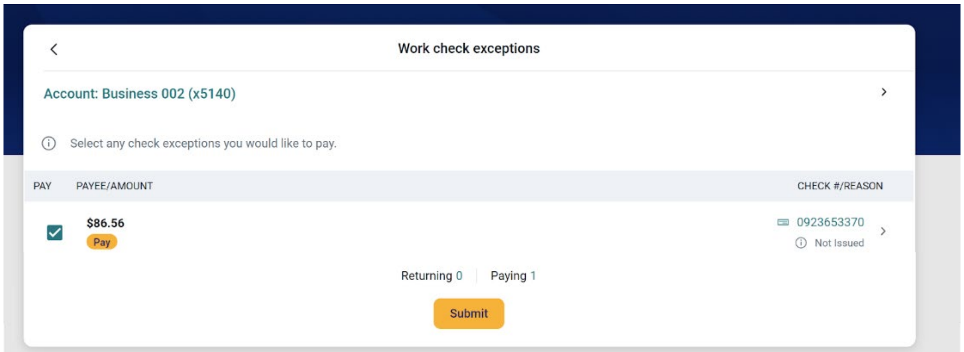
Step 2

Click **Work check exceptions**.



Step 3

Review your exception(s). Click the check number to see additional details. Check the box to Pay the item or leave the box unchecked to return. Click Submit when done.

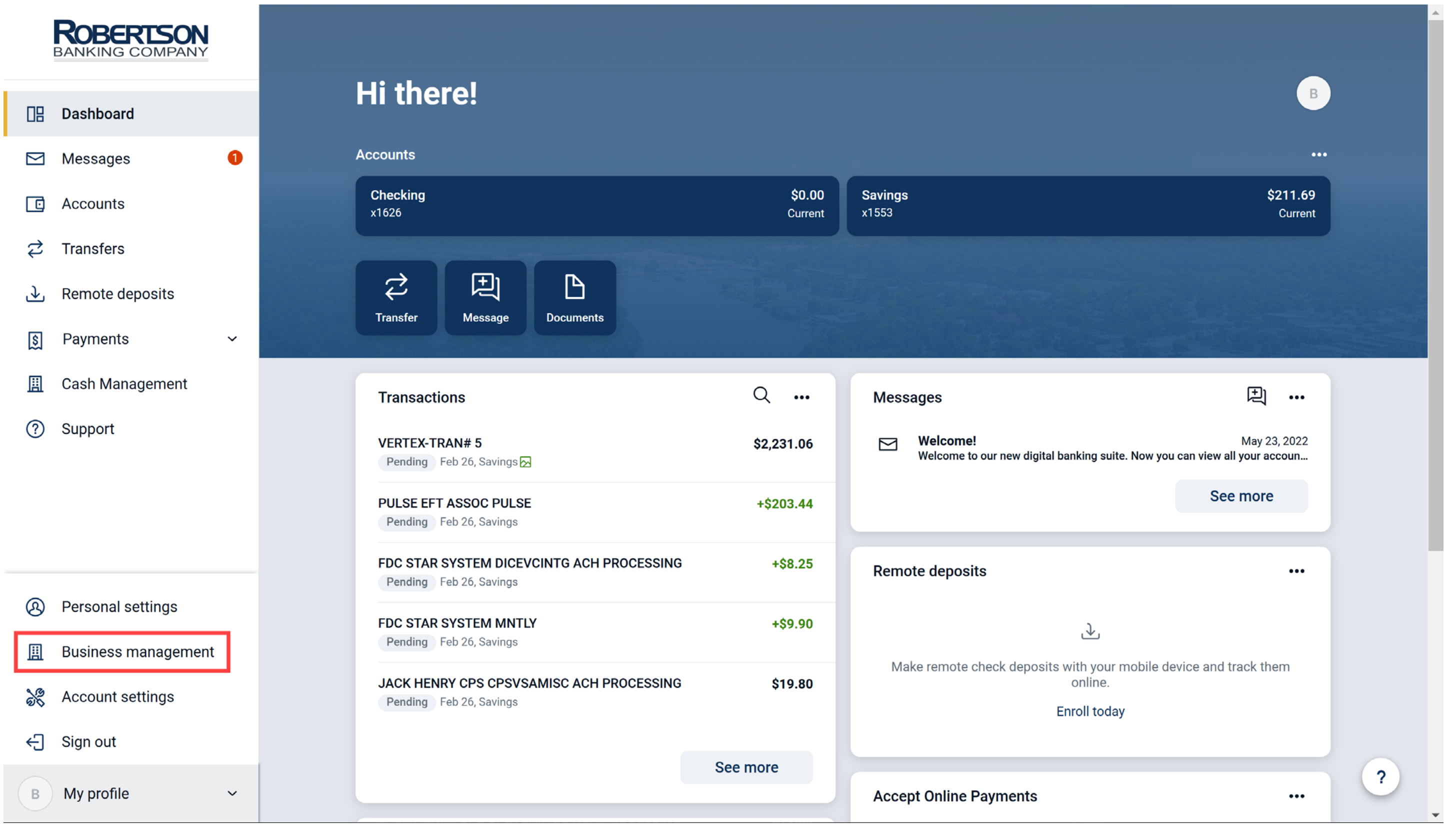


Administration

Create a New User

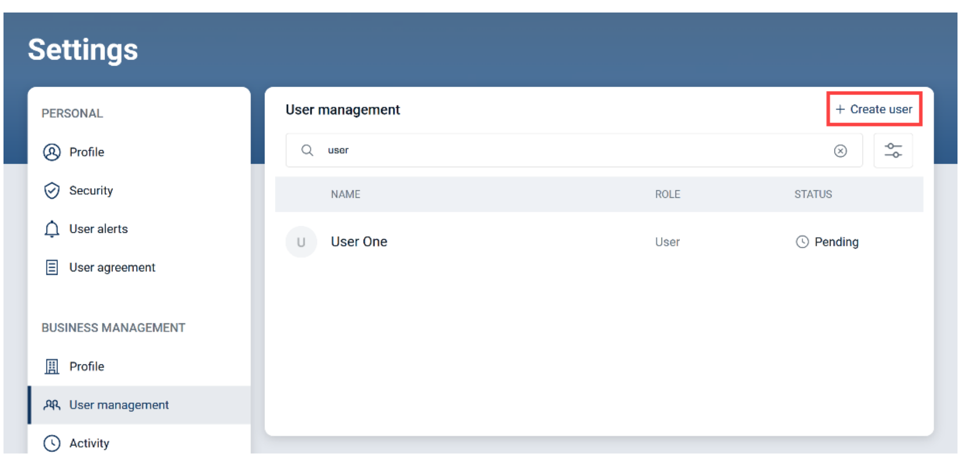
Step 1

Click your profile and select **Business management**.



Step 2

Click **+ Create user**.

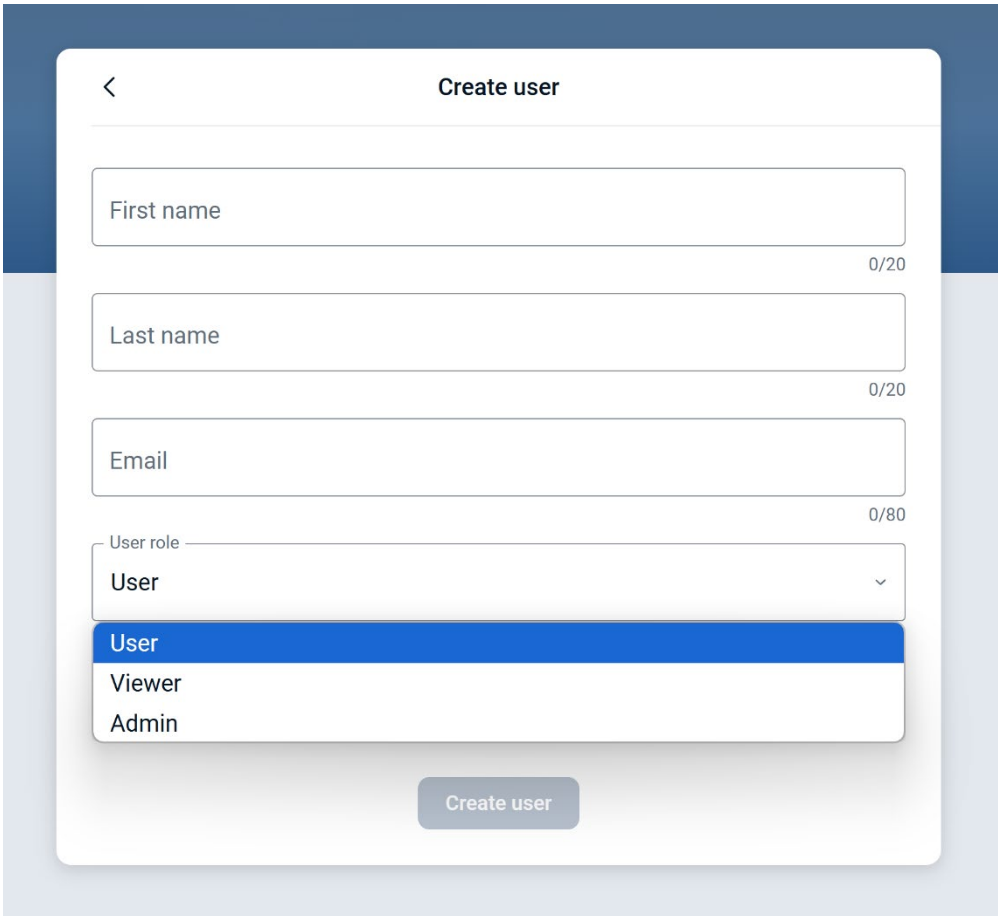


Step 3

Enter the user's **First name**, **Last name**, **Email address**, and choose their **User role**.

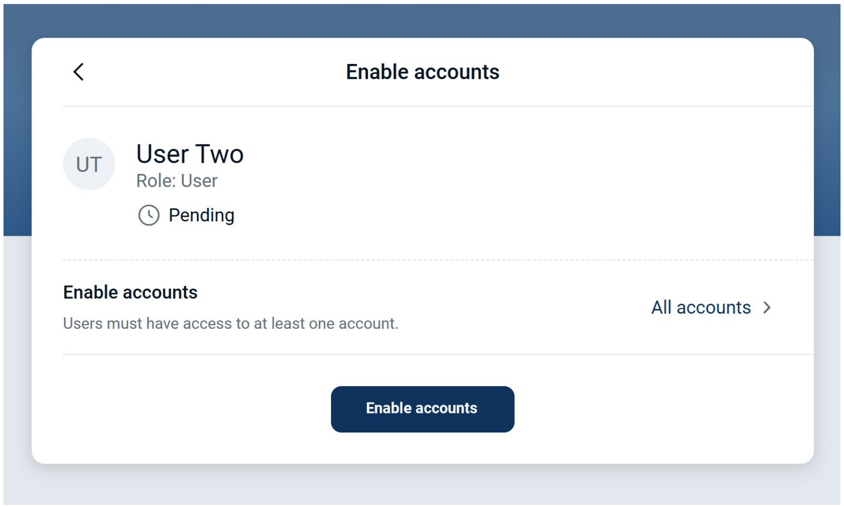
- **User:** can have customized permissions and account access but cannot manage other users.
- **Viewer:** View only access on specified accounts.
- **Admin:** can have customized permissions and account access as well as user management.

Click **Create user**.
Please note: You may be asked to authenticate with your password



Step 4

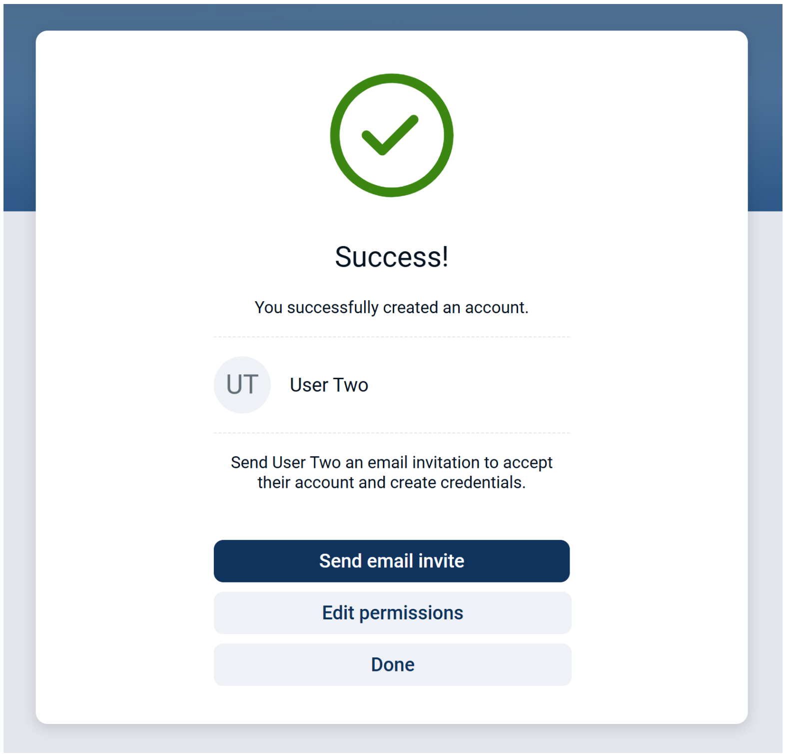
Click the **Enable accounts** arrow and choose the account(s) the user should have access to. Click **Enable accounts** to continue.



Step 5

Review your confirmation and choose from the following options:

1. Click **Send email invite** to send the user a link to set up their login credentials without modifying permissions further.
   Please note: Permissions and account access can be modified in the user's profile at a later time if necessary.
2. Select **Edit permissions** to modify entitlements and account access prior to sending the email invite.
3. Click **Done** to send the invite and edit permissions at a later time.

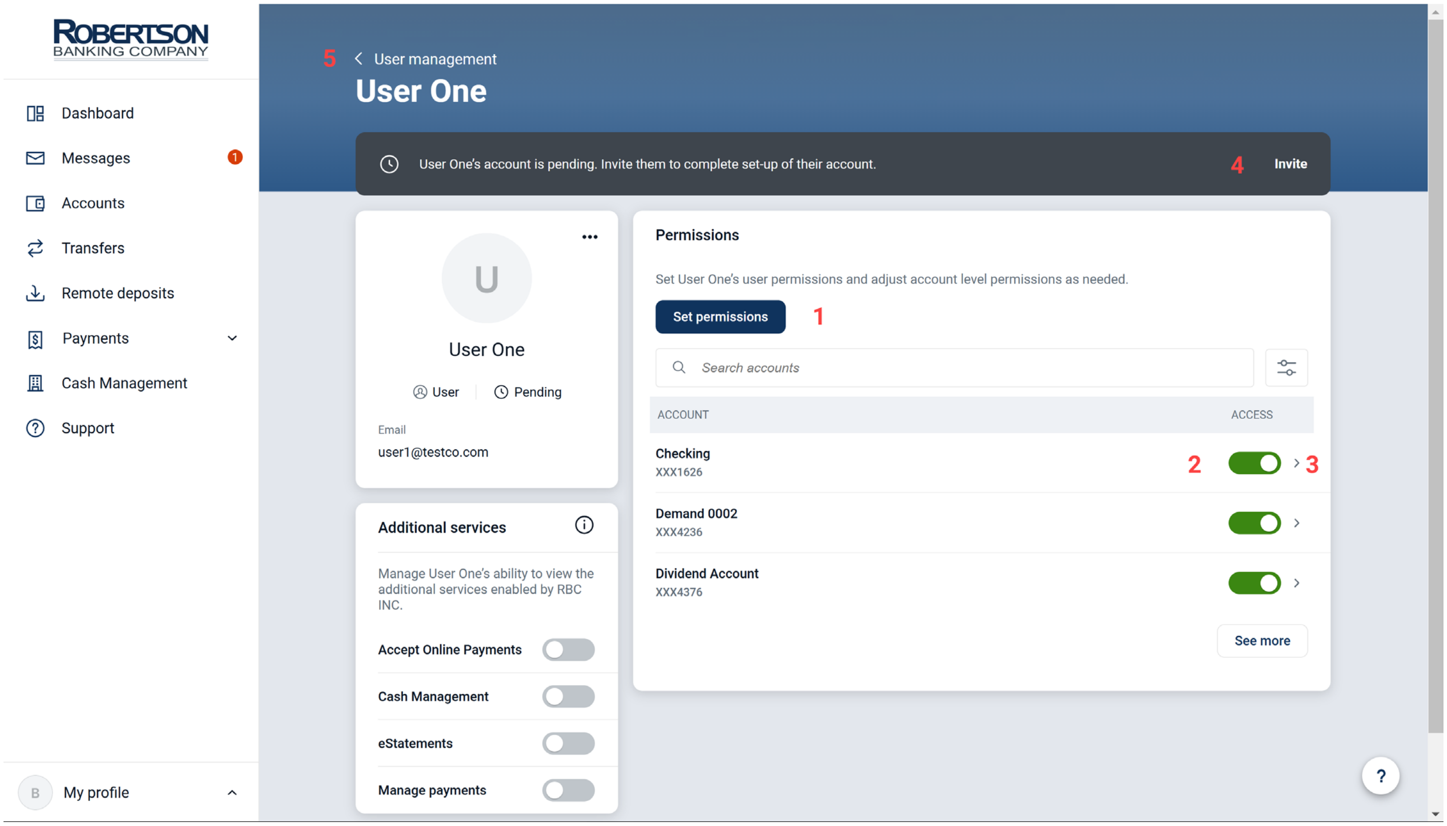


Step 6

If **Edit permissions** was selected:

1. Click **set permissions** to modify global entitlements for the user.
2. Toggle on an account to give the user access.
3. Select an account to adjust the global permissions at the account level is necessary.
4. Select **Invite** to send the user an email to set up their login credentials.
5. Click the arrow to return to the Business Management page.

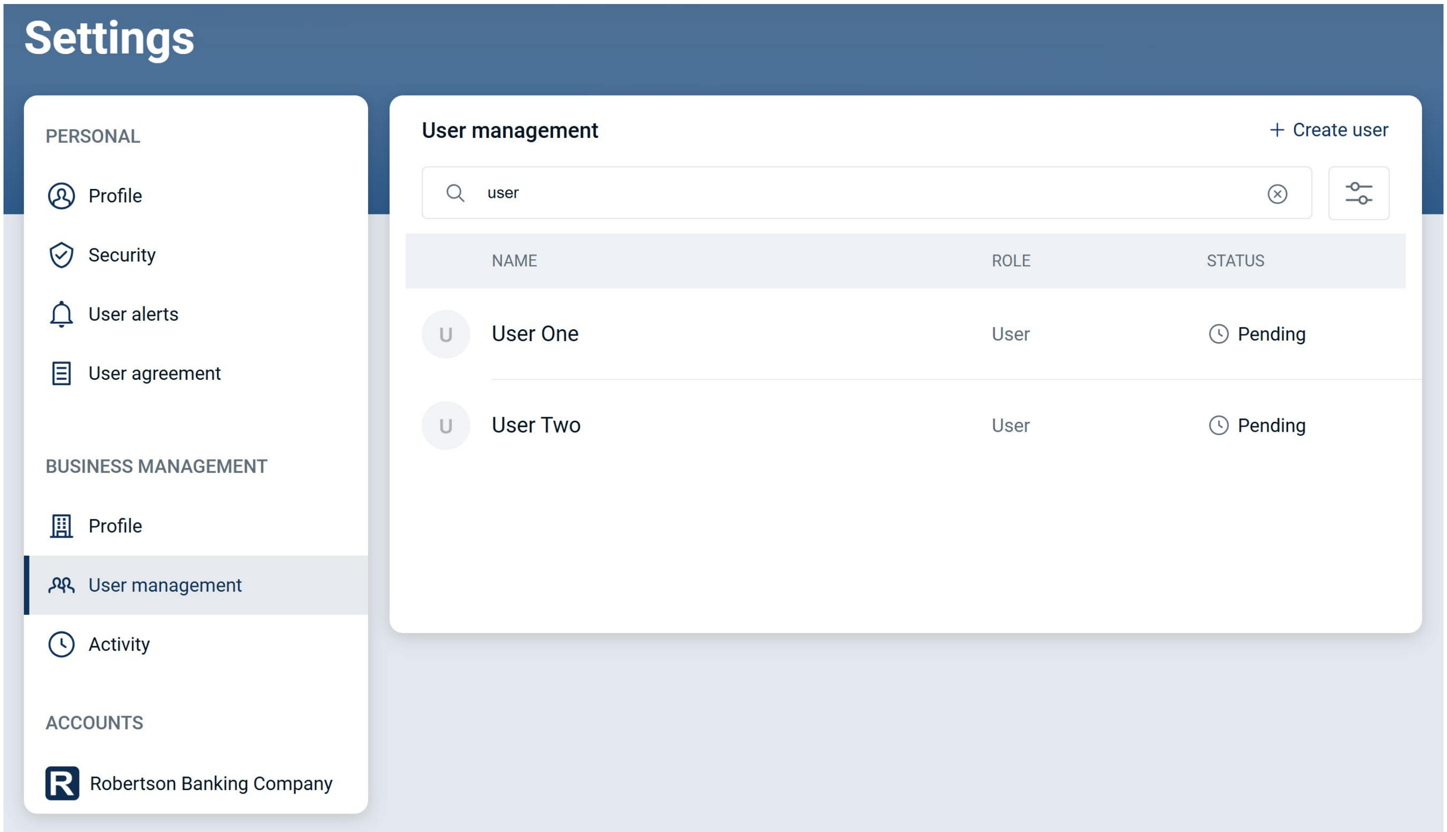
Please see the **Editing or Deleting a User** section in this document for more information on permissions



Step 7

The new user will appear as **Pending** on the Business Management page. Their status will change to **Active** once they set up their credentials.

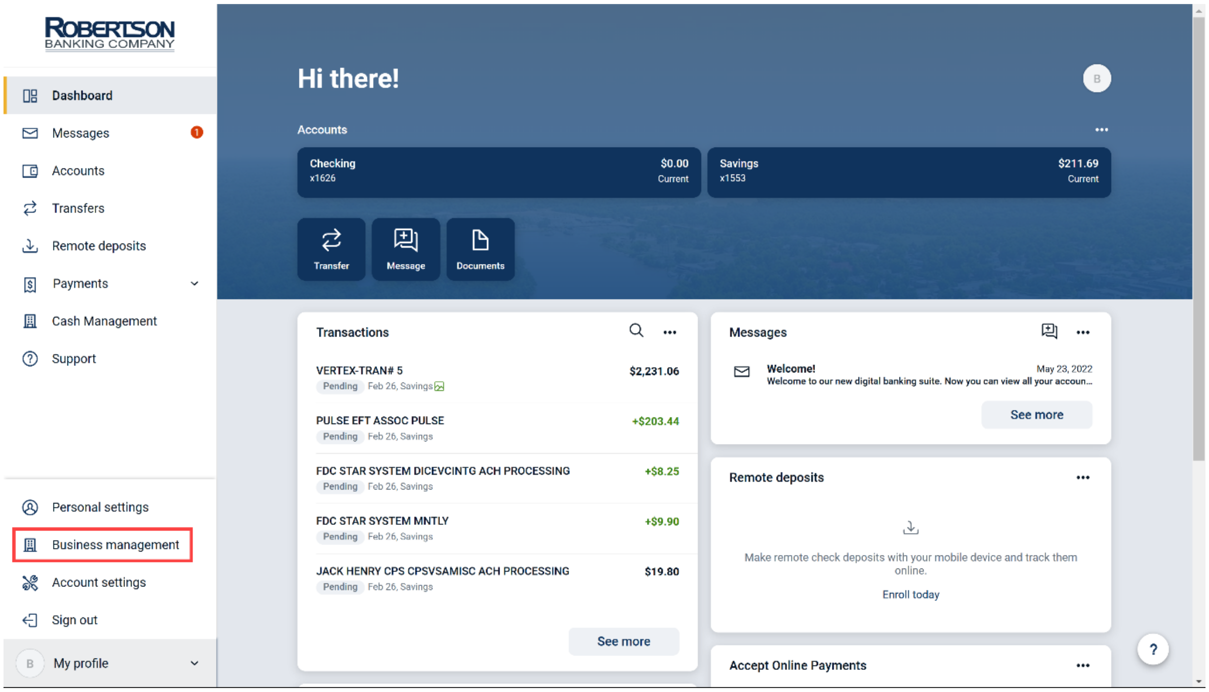
Please note: You can modify permissions, account access, or manage the invite at any time by clicking the user's name.



Editing or Deleting a User

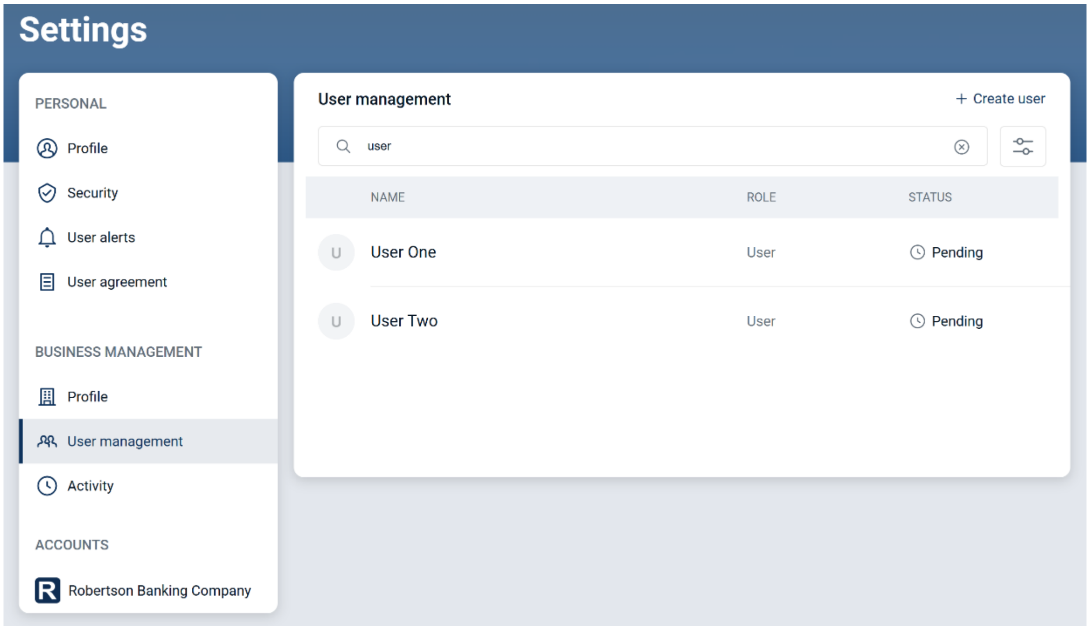
Step 1

Click your profile and select **Business management**.



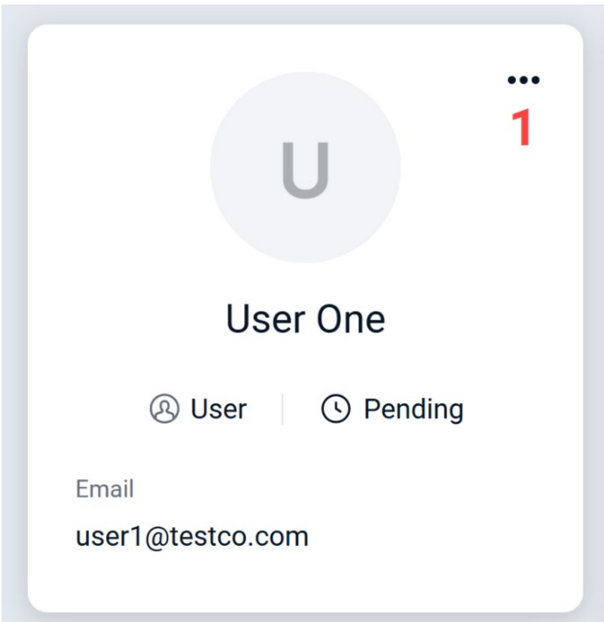
Step 2

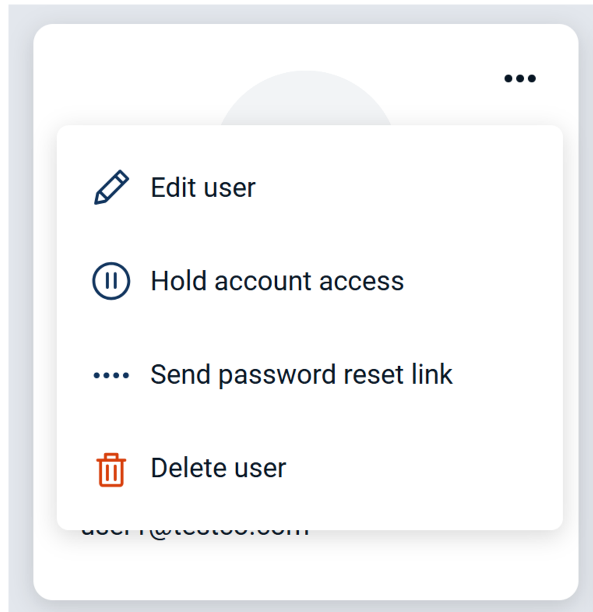
Select the user you'd like to edit.



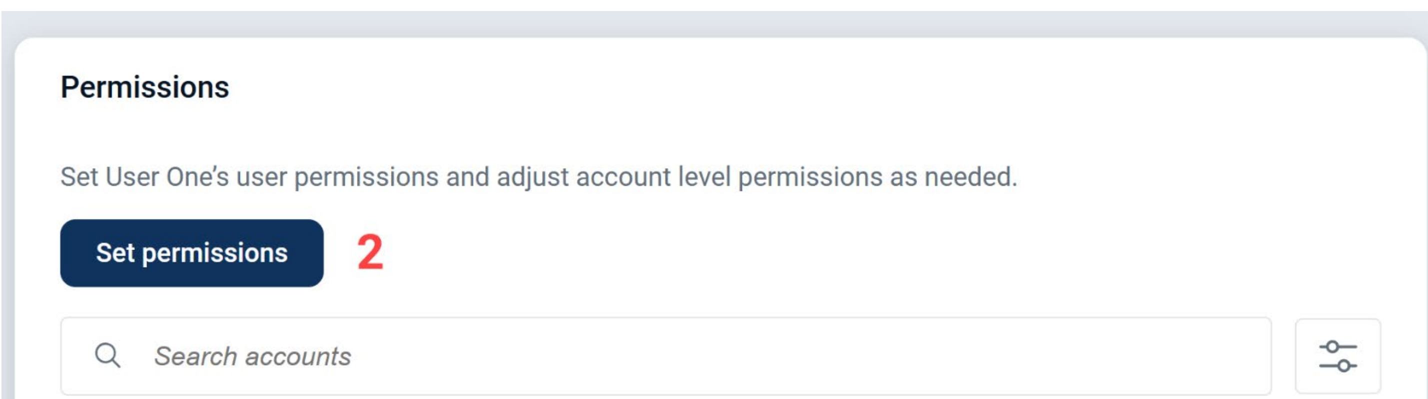
Step 3

1. Select the **ellipsis** icon.
    a. Click **Edit user** to change the users name, role, or email address.
    b. Select **Hold account access** to temporarily prevent them from logging in.
    c. Click **Send password reset** link to email them a link.
    d. Select **Delete user** to remove their access permanently.





2. Click **Set permissions** to modify global entitlements.
   Please note: Options may vary depending on your company's setup.



    a. ACH
        i. **Enable:** Activates this feature for the user.
        ii. **View ACH:** Must be enabled to edit any other ACH permission.
        iii. **Daily ACH limit:** Maximum amount the user can initiate per day.
        iv. **Initiate ACH:** Allows user to transmit ACH payments to the bank.
        v. **Initiate same day ACH:** Allows user to transmit same day ACH payments to the bank.

vi. **Full ACH Control:** Allows a user to initiate an ACH payment that they have created. If this is not activated, the user cannot initiate a payment they created. A second user must initiate it.

vii. Edit/Delete ACH Control:

1. **Full edit/create:** Allows the user to edit everything within a payment.
2. **Partial Edit:** User can only change the dollar amount of a transaction, debit or credit indicator, add a prenote, or hold the transaction.
3. **None:** User cannot Edit an ACH payment.

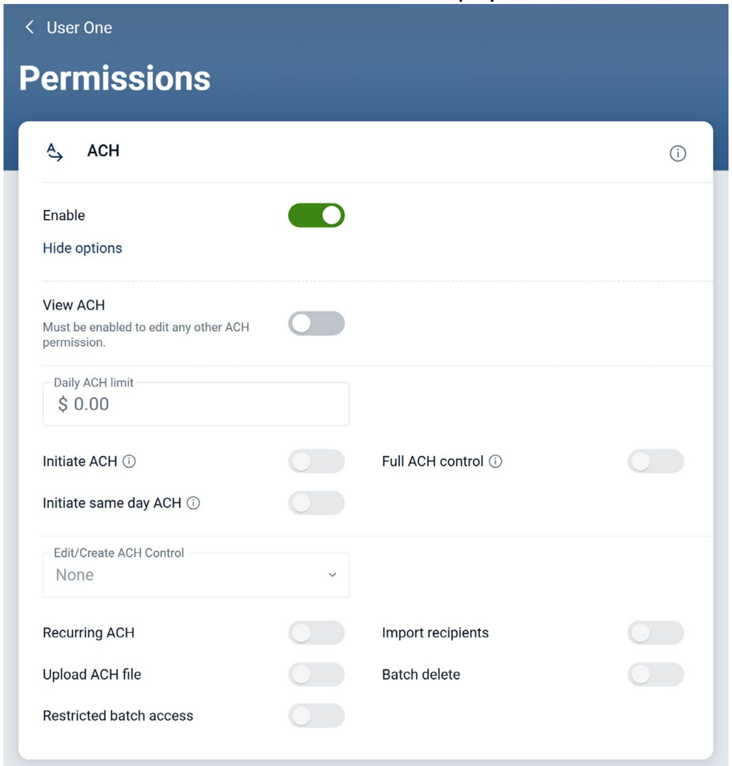
viii. **Recurring ACH:** Allows the user to set a recurring frequency for a payment.

ix. **Upload ACH file:** Allows the user to upload a NACHA formatted file.

x. **Restricted batch access:** User can view payments that have been flagged as restricted.

xi. **Import recipients:** User can import a file containing recipient data to create a payment.

xii. **Batch delete:** User can delete an ACH payment.



b. Bill Pay

i. **Enable:** Activates this feature for the user.

c. Card Management

i. **Enable:** Activates this feature for the user.

d. Positive Pay

i. **Enable:** Activates this feature for the user.

ii. **Upload Positive Pay:** Allows user to upload an issued items check file to the bank.

iii. **Work Positive Pay:** Allows user to pay or return issued item check exceptions.

iv. **Download Positive Pay:** Not applicable.

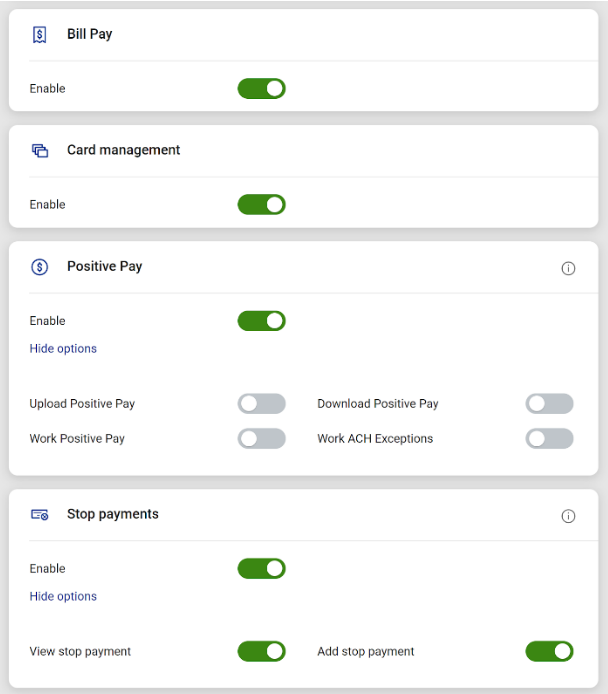
v. **Work ACH Exceptions:** User can pay or return ACH exceptions items.

e. Stop Payments

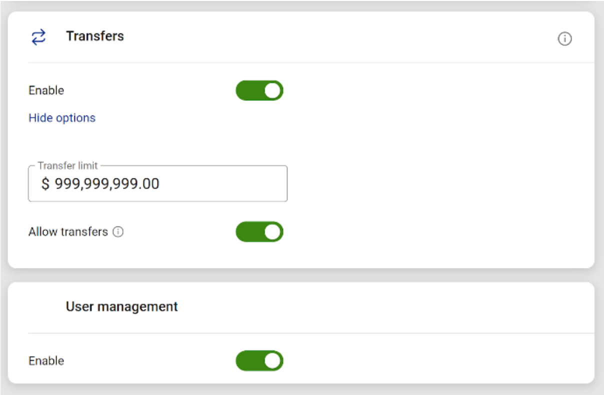
i. **Enable:** Activates this feature for the user.

ii. **View Stop Payment:** User can only see existing stop payments.

iii. **Add stop payment:** User can create a stop payment.



f. Transfers
   i. **Enable:** Activates this feature for a user.
   ii. **Transfer limit:** Maximum amount a user can transfer per day.

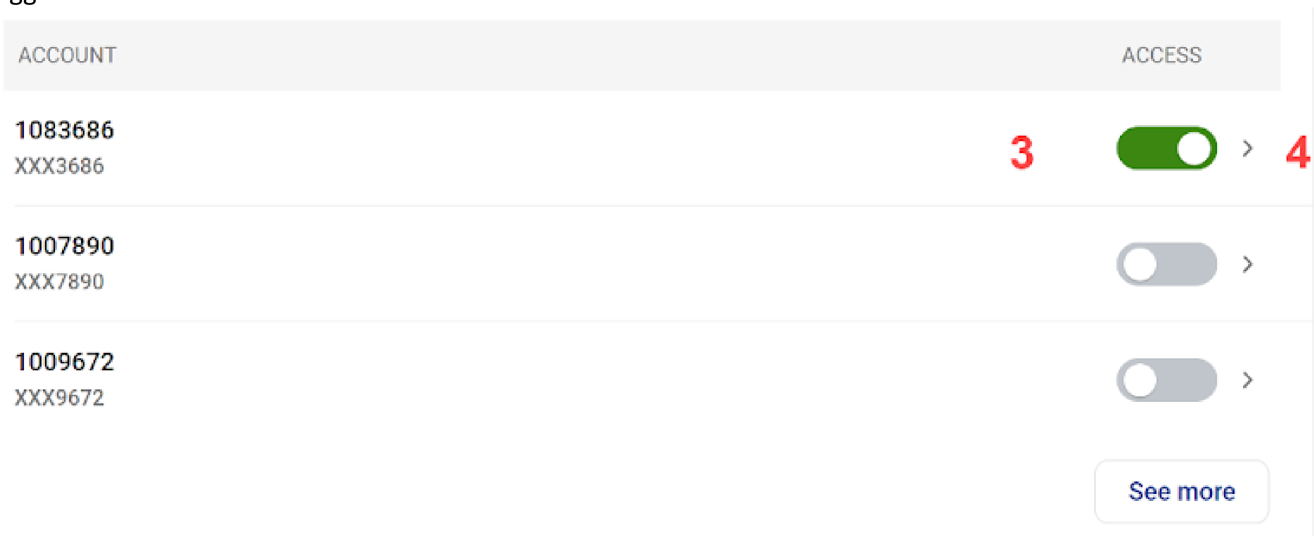


g. **User Management:** Allows user to create, modify, and delete other users.
h. **Wires**
   i. **Enable:** Activates this feature for a user
   ii. **Create wire templates:** Allows user to set up a wire that can be reused
   iii. **Edit wire templates:** Allows user to modify reusable wires
   iv. **Create one-time wires:** Allows user to set up a single use wire
   v. **Edit one-time wires:** Allows user to modify single use wires
   vi. **Per wire limit:** Amount the user can transmit per wire
   vii. **Transmit wires:** Allows user to send wires to the bank for processing

viii. **Full wire control:** Allows user to transmit wires they have created. If this is deactivated, a second user will have to transmit the wire.

Click the **back arrow** once done.

3. Toggle on the switch to activate an account for a user.

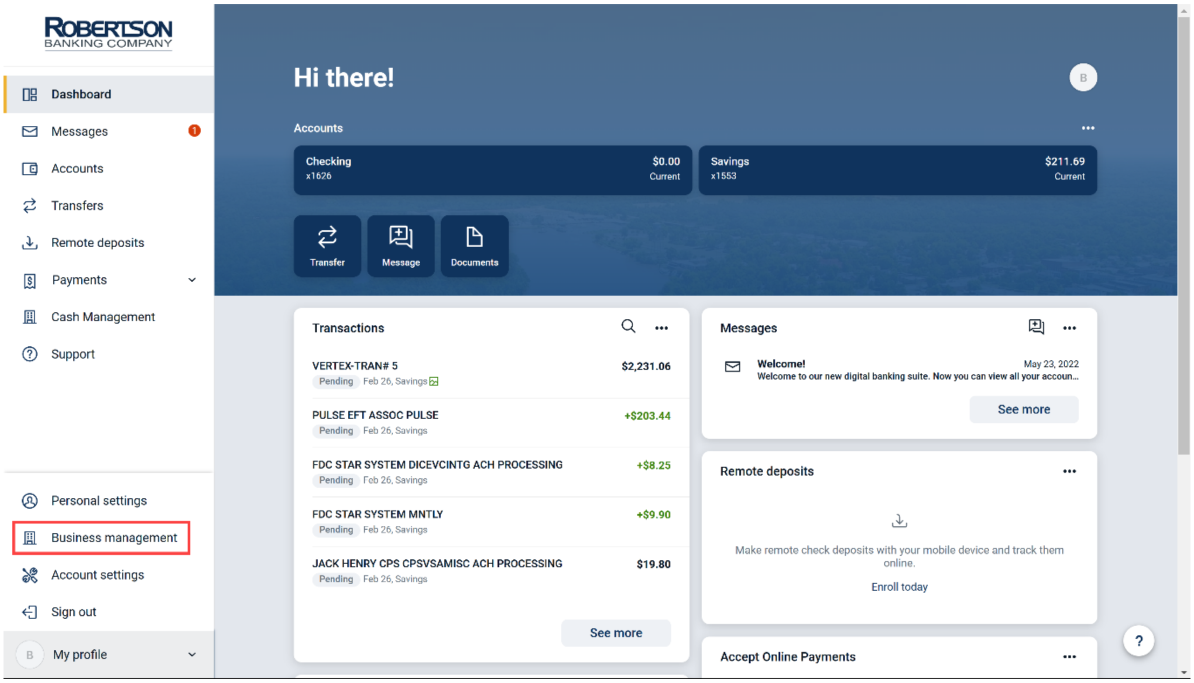


4. Select an account to modify the global permissions on a per account basis.
5. Click the **back arrow** to return to the Business Management page.

Unlock a Locked User

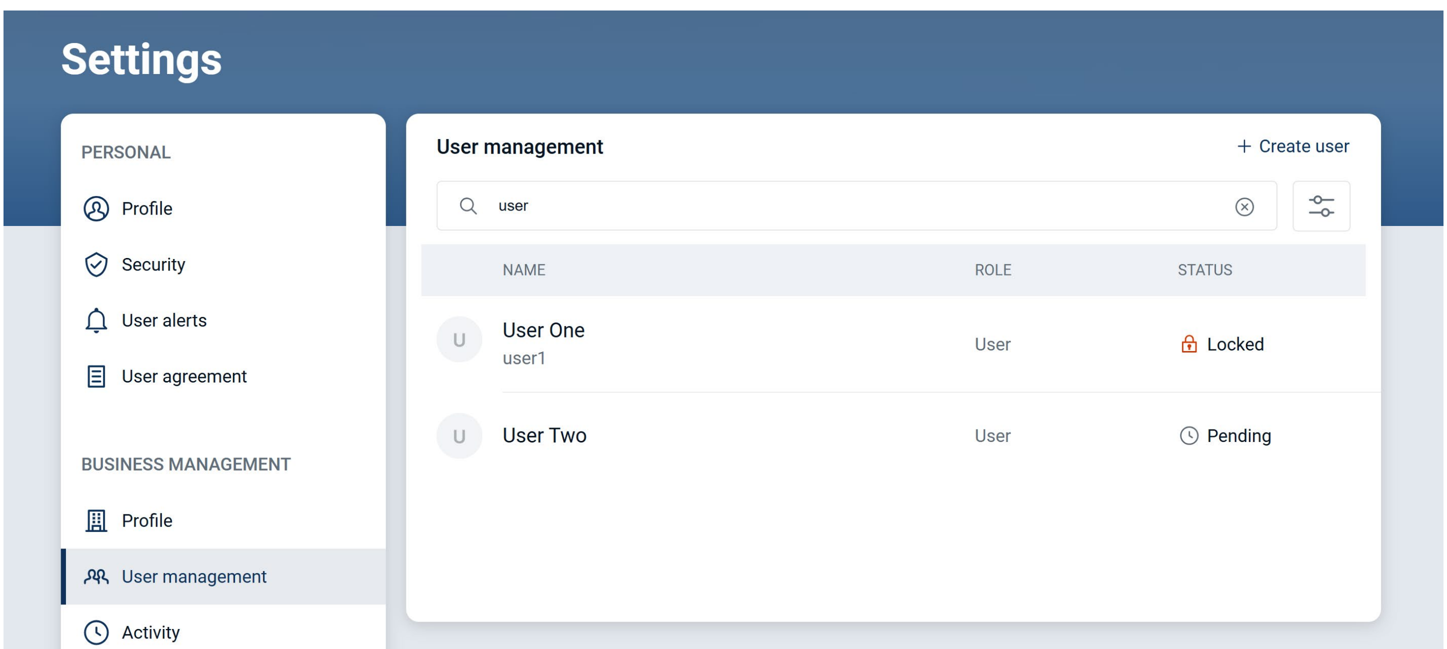
Step 1

Click your profile and select **Business management**.



Step 2

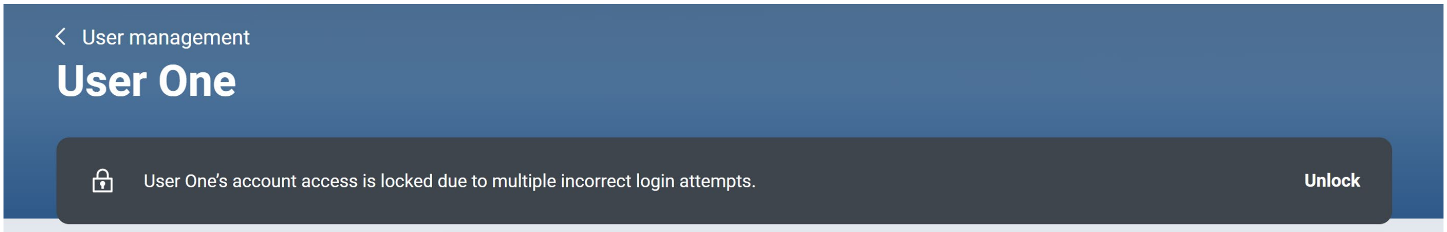
Select the locked user.

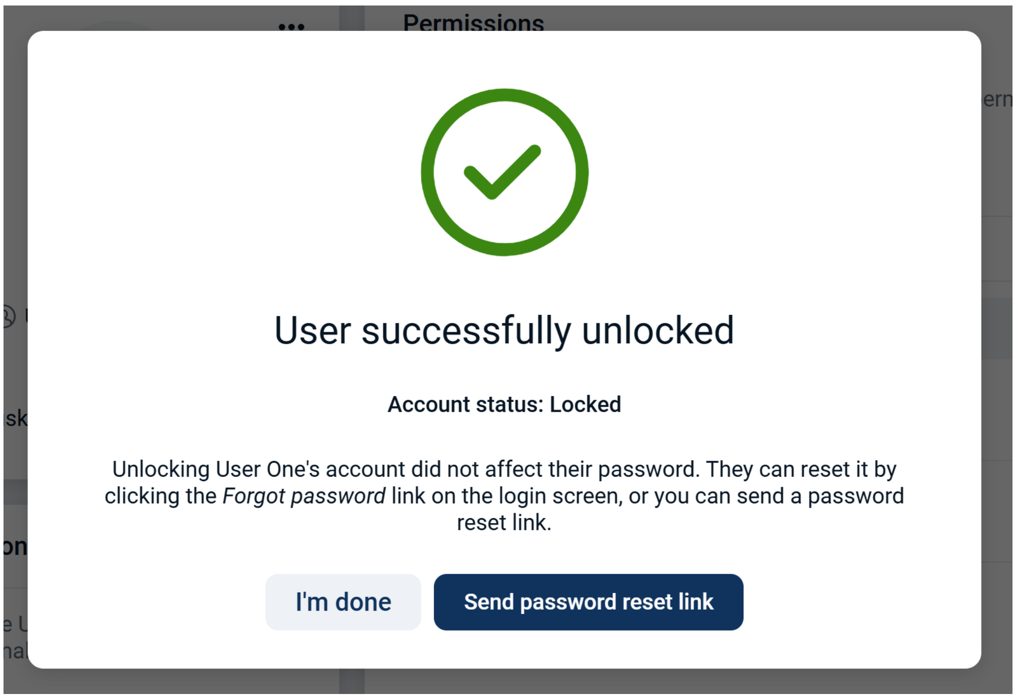


Step 3

Click **Unlock** and review the confirmation.

Please note: You can email the user a link to reset their password if they continue to have trouble. Otherwise, click **I'm Done**.

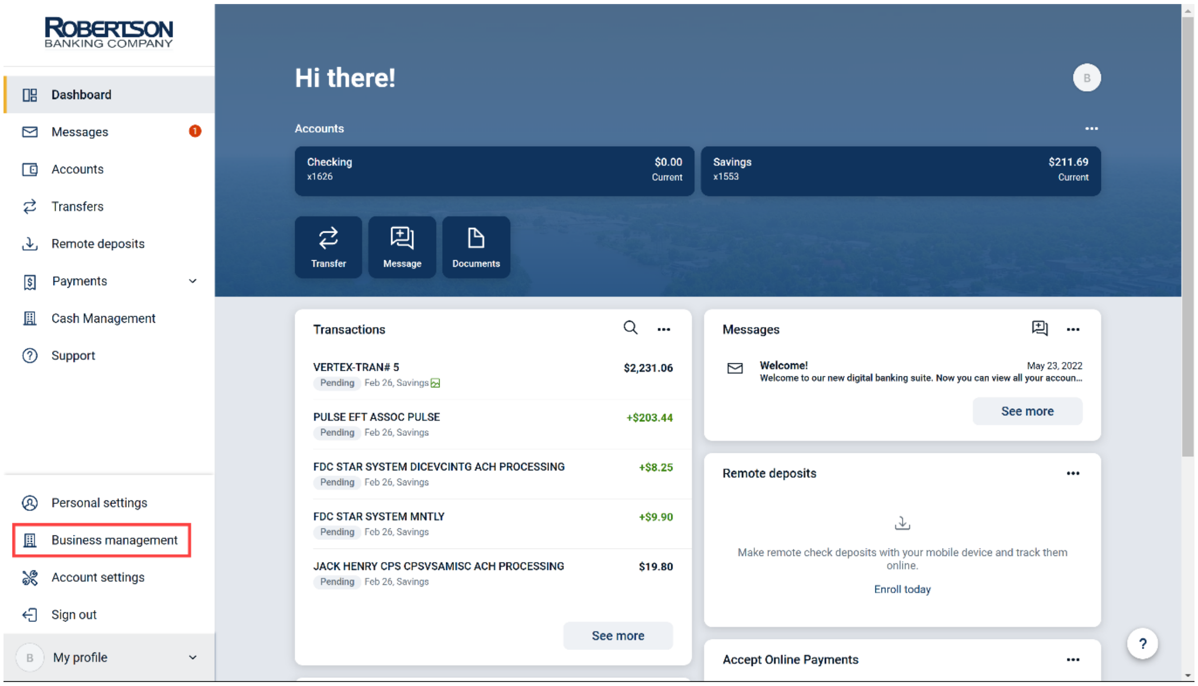




Reset a User’s Password

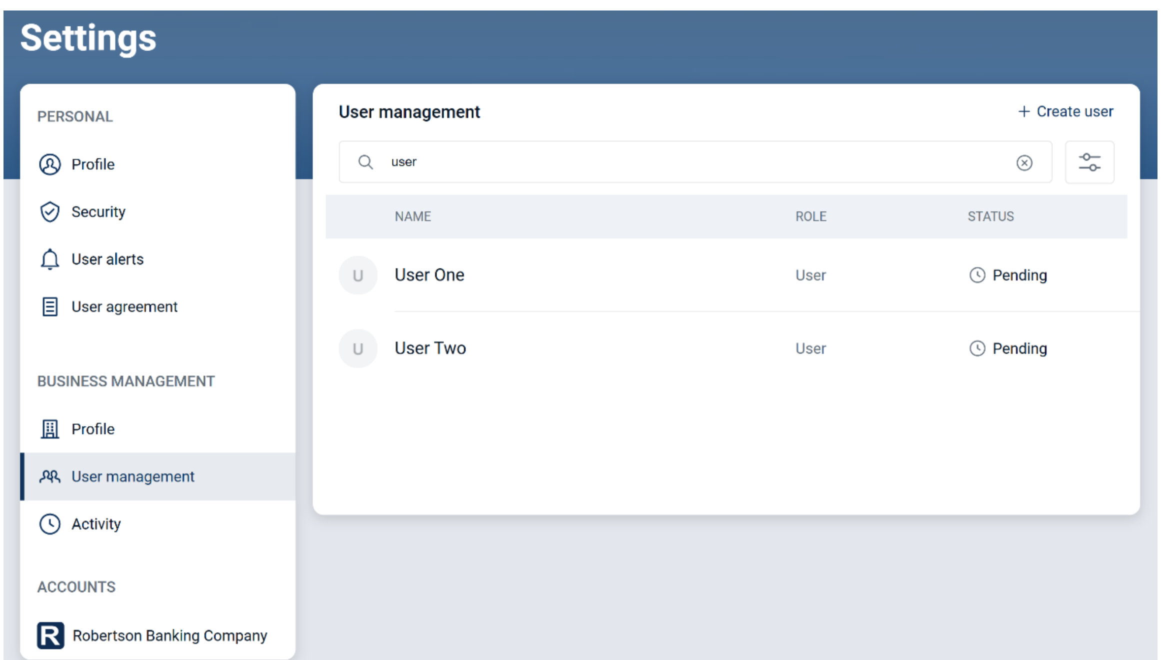
Step 1

Click your profile and select **Business management**.



Step 2

Select the user to reset.



Step 3

Click the **ellipsis** icon and choose **Send password reset link** to email the user.