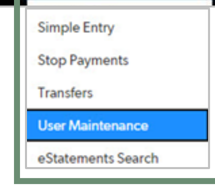
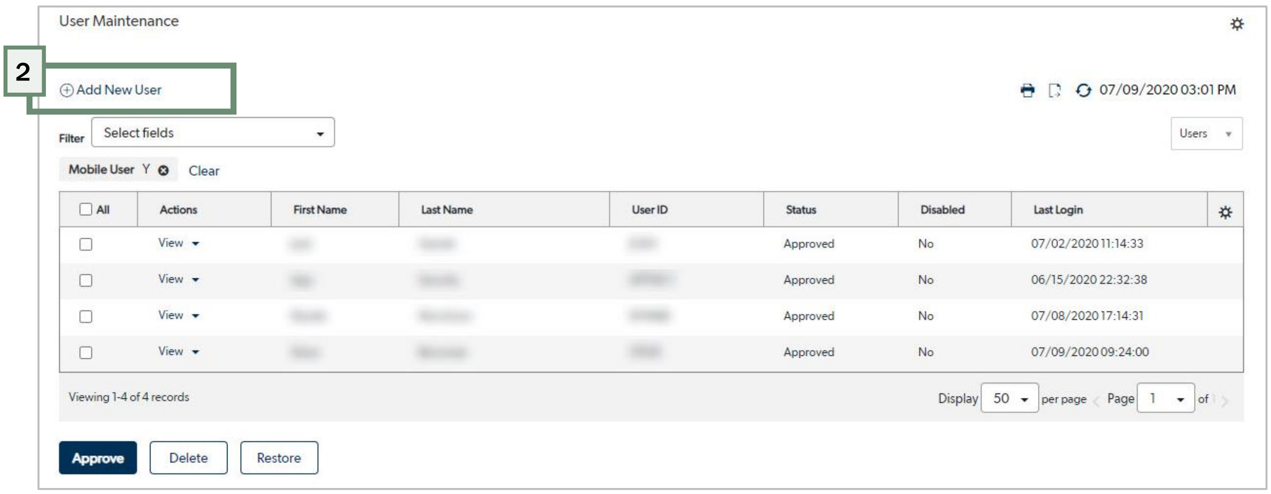
USER MAINTENANCE

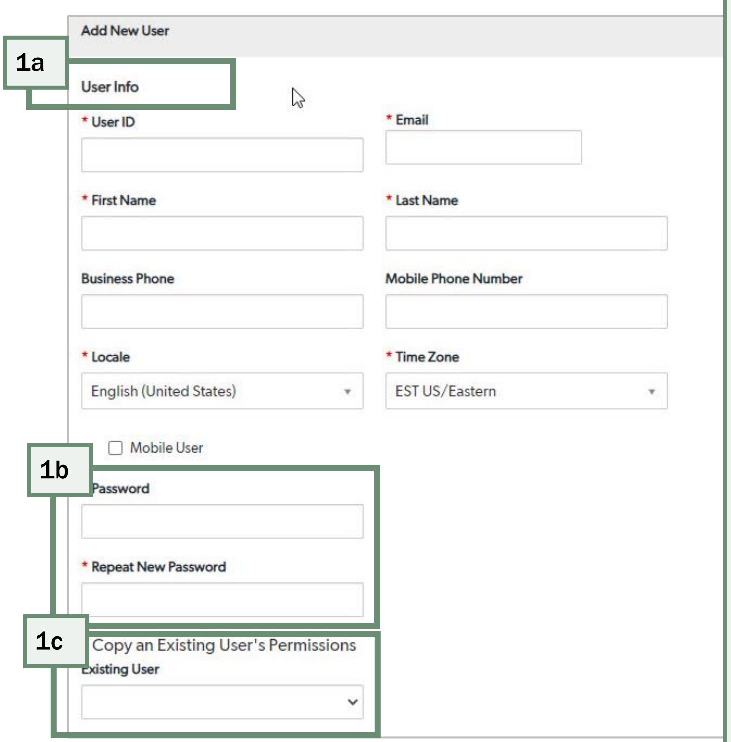
CREATE A NEW USER

1. To create a new user within Business Connect, click on **Add Widget** in the top right corner of the page and select the **User Maintenance** Widget.
2. Once in User Maintenance click **Add New User**.





1. DEFINE USER



1a. Complete **User Info** in the required fields.

NOTE: Fields with an asterisk are required.

1b. Enter a new **Password** and re-enter for confirmation.

Make note of the **Company ID, User ID** and **Password** to provide to the new user. Credentials will not be emailed. Passwords require:

- a minimum of 8 characters
- a maximum of 16 characters
- upper and lower case
- alphanumeric
- at least one special character

ACCEPTABLE SPECIAL CHARACTERS:

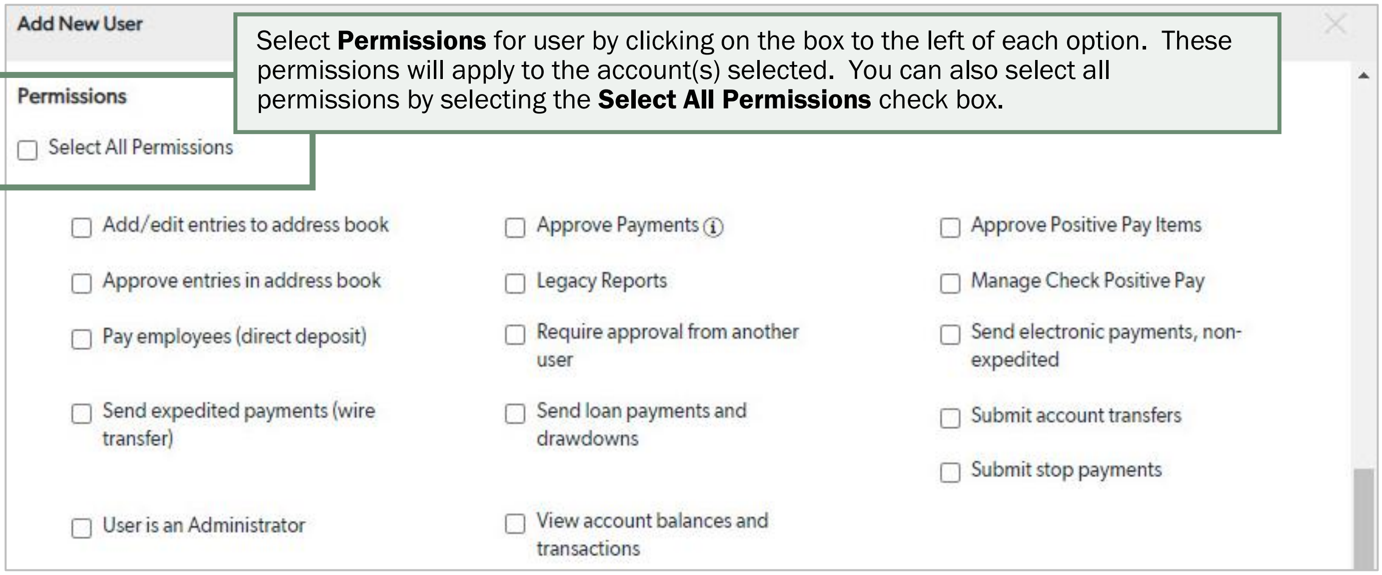
!"$%&'()*+,-.\:=?@^_{|}~;

1c. If this user will have the same permissions as an existing user, save time by selecting **Copy an Existing User's Permissions**.

NOTE: Verify and/or edit all permissions and settings as needed.

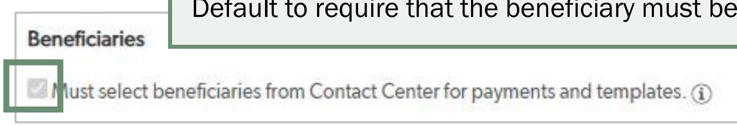
2. SET PERMISSIONS

Select **Permissions** for user by clicking on the box to the left of each option. These permissions will apply to the account(s) selected. You can also select all permissions by selecting the **Select All Permissions** check box.



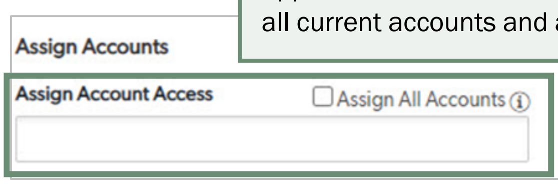
3. BENEFICIARIES

Default to require that the beneficiary must be in the Contact Center.



4. ASSIGN ACCOUNTS

To assign accounts, click within the box and the list of accounts will appear. You can click **Assign All Accounts** to assign all services to all current accounts and any account(s) added in the future.

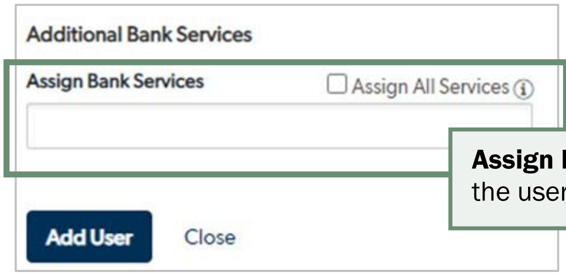


5. LIMITS

You can apply **Limits** to a user and indicate the maximum dollar amount of payments that a user can approve on a given date.

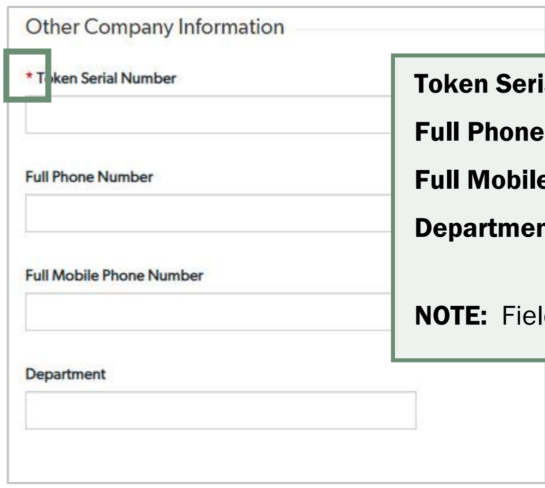
- **Daily** – Daily limits are the maximum total dollar amount that the user can approve for a value date.
- **Transaction** – Transaction limits are the maximum dollar amount that the user can approve for a single transaction.
- **Batch** – Batch limits are the maximum dollar amount that can be approved for an imported file.

6. ADDITIONAL BANK SERVICES



Assign Bank Services allows you to assign Widgets that the user will have permission to access.

7. OTHER COMPANY INFORMATION



Token Serial Number – Token Serial Number assigned to user.

Full Phone Number - Full office number including area code.

Full Mobile Number - Full mobile number including area code.

Department – Organizational department the user is a member.

NOTE: Fields with an asterisk are required.

8. ADD USER

Once you have finished applying all necessary permission, click **Add New User.**

NOTE: Added users in an Entered status will require another user to approve them.

9. APPROVING A USER

a. To approve a user, select the user listed under **User Maintenance.**

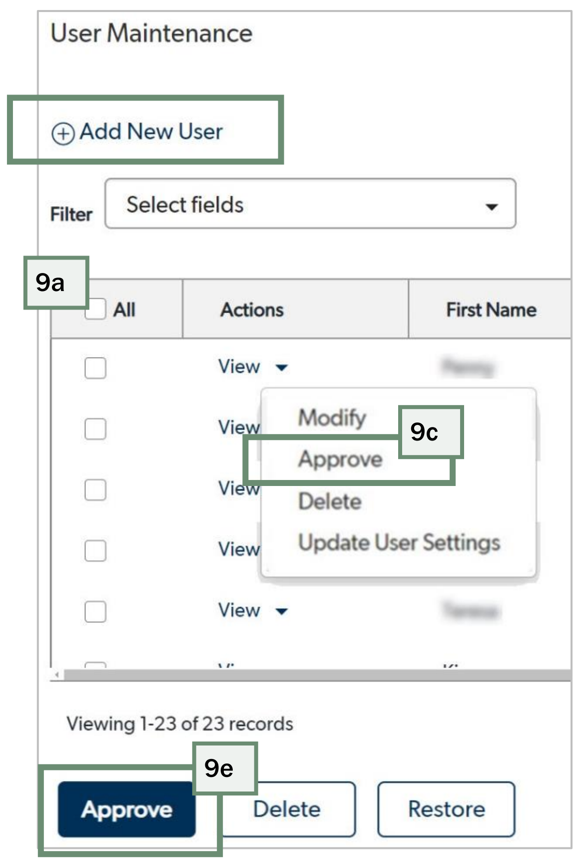
b. Scroll through your list of users to locate those in **Entered** status.

NOTE: You can also perform a search on status and select **Entered.**

c. From the **Actions** menu, select **Approve.**

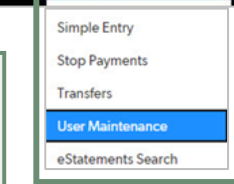
d. Review all user information and permissions before making your final approval at the bottom of the screen.

e. If the user information is correct, click **Approve.**

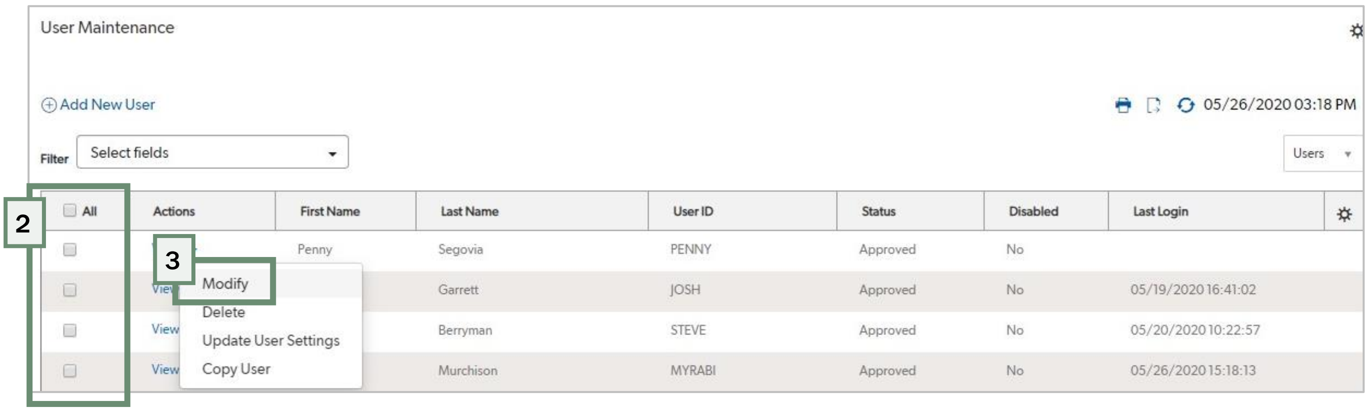


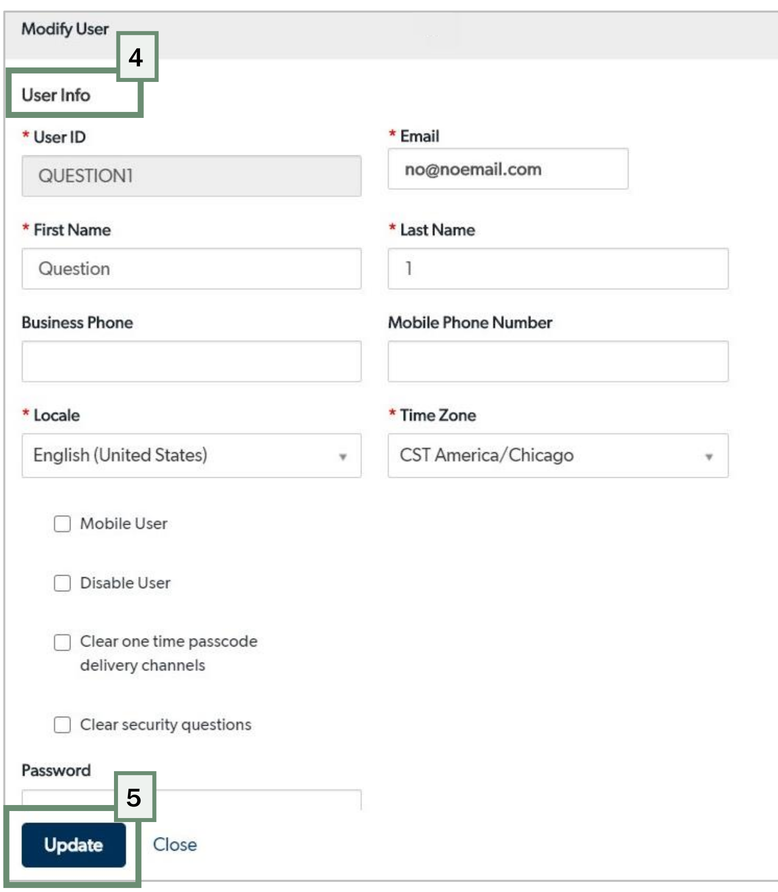
Frost BUSINESS CONNECT

MODIFY AN EXISTING USER



1. To modify an existing user within Business Connect, click on **Add Widget** in the top right corner of the page and select the **User Maintenance** Widget.
2. Scroll down to the **User Maintenance** Widget and find the user you wish to modify.
3. Click **Modify** next to the desired user.





4. Click on the appropriate tab to make the necessary modifications:
   - The **Update User information** option (name, email, phone number, etc.) allows you to reset a password, disable the user, reset the user's security questions and more.
   - The **Set Permissions** option allows you to update user permissions that apply to accounts assigned to the user.
   - The **Assign Accounts** option allows you to apply permissions to the account selected.
   - The **Apply Limits** option indicates the maximum dollar amount of payments that a user can approve on a given date.
5. Once the updates are complete, click **Update**.