

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**.

2

User Maintenance

⊕ Add New User

Filter: Select fields

Mobile User Clear

<input type="checkbox"/> All	Actions	First Name	Last Name	User ID	Status	Disabled	Last Login
<input type="checkbox"/>	View				Approved	No	07/02/2020 11:14:33
<input type="checkbox"/>	View				Approved	No	06/15/2020 22:32:38
<input type="checkbox"/>	View				Approved	No	07/08/2020 17:14:31
<input type="checkbox"/>	View				Approved	No	07/09/2020 09:24:00

Viewing 1-4 of 4 records

Display 50 per page Page 1 of 1

Approve Delete Restore

1. DEFINE USER

1a

Add New User

User Info

* User ID

* Email

* First Name

* Last Name

Business Phone

Mobile Phone Number

* Locale

English (United States)

* Time Zone

EST US/Eastern

Mobile User

1b

Password

* Repeat New Password

1c

Copy an Existing User's Permissions

Existing 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

Add New User

Permissions
 Select All 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.

<input type="checkbox"/> Add/edit entries to address book	<input type="checkbox"/> Approve Payments ⓘ	<input type="checkbox"/> Approve Positive Pay Items
<input type="checkbox"/> Approve entries in address book	<input type="checkbox"/> Legacy Reports	<input type="checkbox"/> Manage Check Positive Pay
<input type="checkbox"/> Pay employees (direct deposit)	<input type="checkbox"/> Require approval from another user	<input type="checkbox"/> Send electronic payments, non-expedited
<input type="checkbox"/> Send expedited payments (wire transfer)	<input type="checkbox"/> Send loan payments and drawdowns	<input type="checkbox"/> Submit account transfers
<input type="checkbox"/> User is an Administrator	<input type="checkbox"/> View account balances and transactions	<input type="checkbox"/> Submit stop payments

3. BENEFICIARIES

Beneficiaries

Must select beneficiaries from Contact Center for payments and templates. ⓘ

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

4. ASSIGN ACCOUNTS

Assign Accounts

Assign Account Access Assign All 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

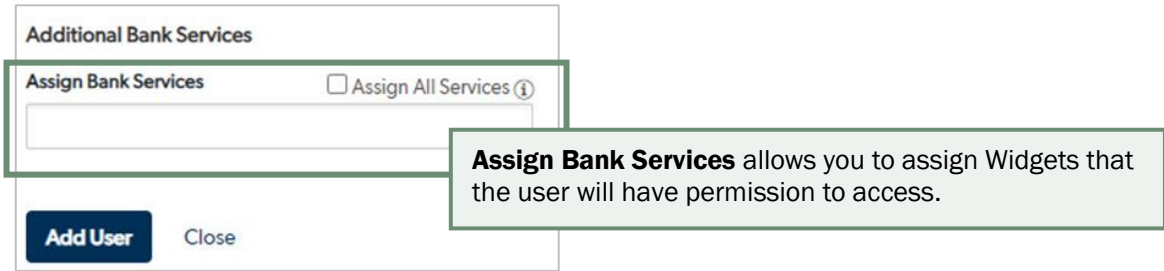
You can apply **Limits** to a user and indicate the maximum dollar amount of payments that a user can approve on a given date.

- **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.

Limits

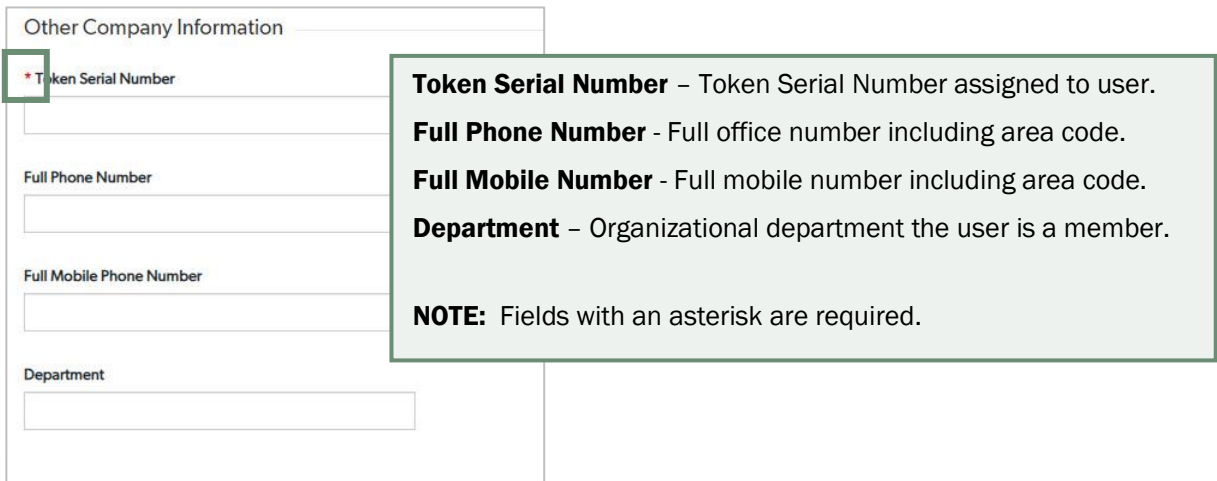
Daily	Transaction	Batch

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

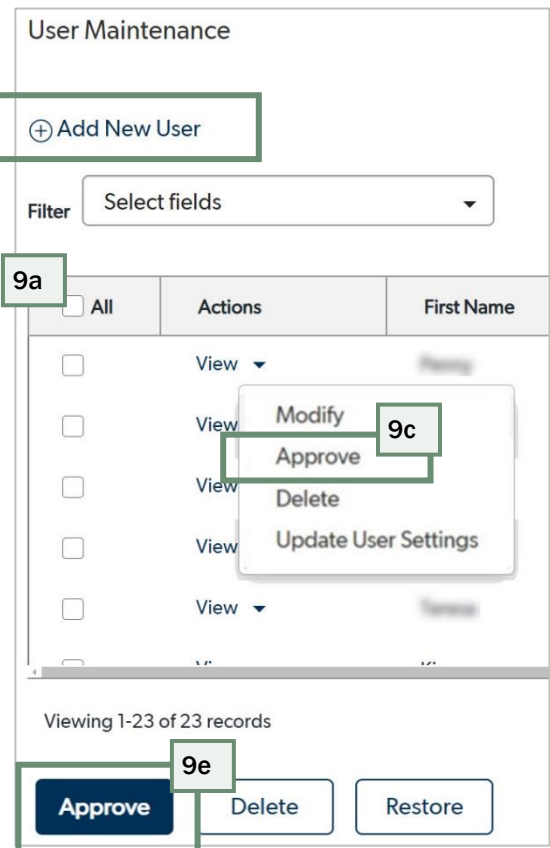
Once you have finished applying all necessary permission, click **Add New User**.

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

9. APPROVING A USER

- To approve a user, select the user listed under **User Maintenance**.
- Scroll through your list of users to locate those in **Entered** status.

NOTE: You can also perform a search on status and select **Entered**.
- From the **Actions** menu, select **Approve**.
- Review all user information and permissions before making your final approval at the bottom of the screen.
- If the user information is correct, click **Approve**.



User Maintenance

9a Add New User

Filter Select fields

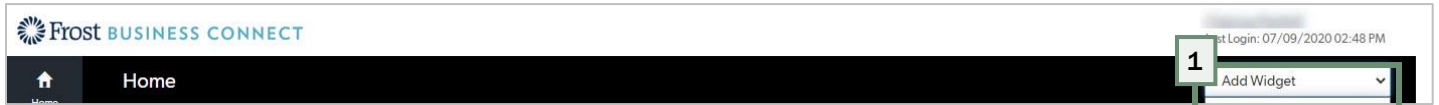
<input type="checkbox"/> All	Actions	First Name
<input type="checkbox"/>	View	[blurred]
<input type="checkbox"/>	View	[blurred]
<input type="checkbox"/>	View	[blurred]
<input type="checkbox"/>	View	[blurred]
<input type="checkbox"/>	View	[blurred]
<input type="checkbox"/>	View	[blurred]

Viewing 1-23 of 23 records

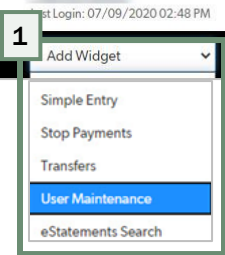
9c Modify Approve Delete Update User Settings

9e Approve Delete Restore

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.



User Maintenance

+ Add New User 05/26/2020 03:18 PM

Filter: Select fields Users

<input type="checkbox"/> All	Actions	First Name	Last Name	User ID	Status	Disabled	Last Login
<input type="checkbox"/>		Penny	Segovia	PENNY	Approved	No	
<input type="checkbox"/>	View 3 Modify		Garrett	JOSH	Approved	No	05/19/2020 16:41:02
<input type="checkbox"/>	View Delete		Berryman	STEVE	Approved	No	05/20/2020 10:22:57
<input type="checkbox"/>	View Update User Settings		Murchison	MYRABI	Approved	No	05/26/2020 15:18:13
<input type="checkbox"/>	View Copy User						

Modify User

4 User Info

* User ID: QUESTION1

* Email: no@noemail.com

* First Name: Question

* Last Name: 1

Business Phone:

Mobile Phone Number:

* Locale: English (United States)

* Time Zone: CST America/Chicago

Mobile User

Disable User

Clear one time passcode delivery channels

Clear security questions

Password: **5**

Update Close

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**.