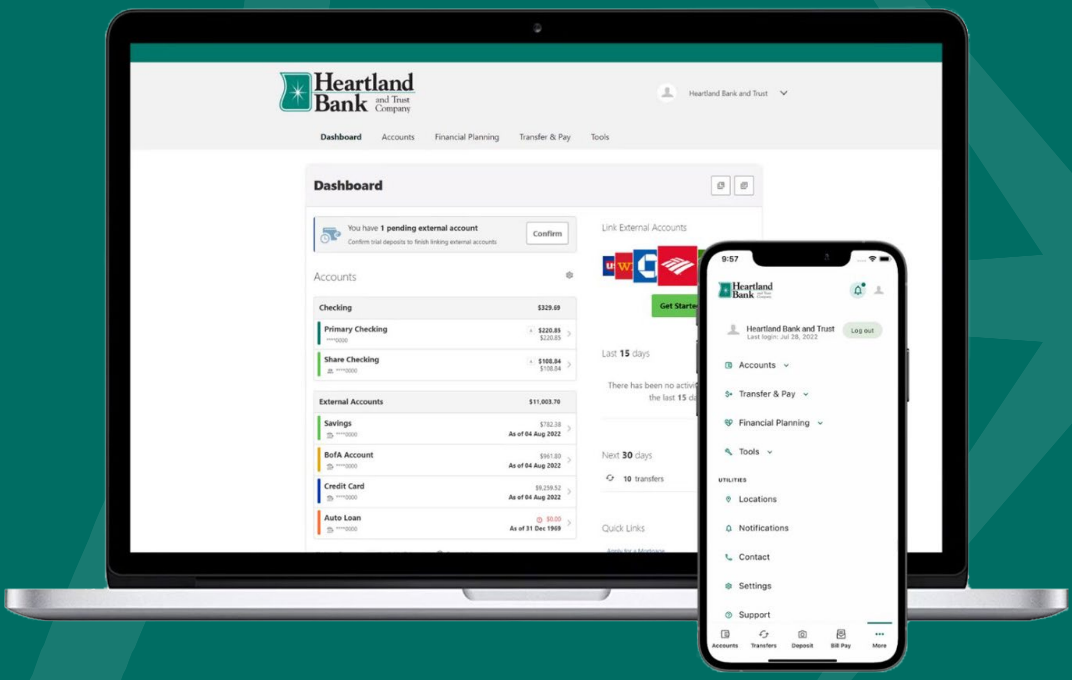
Business Connect User Guide

User Management Guide



Heartland Bank and Trust Company

Table of Contents

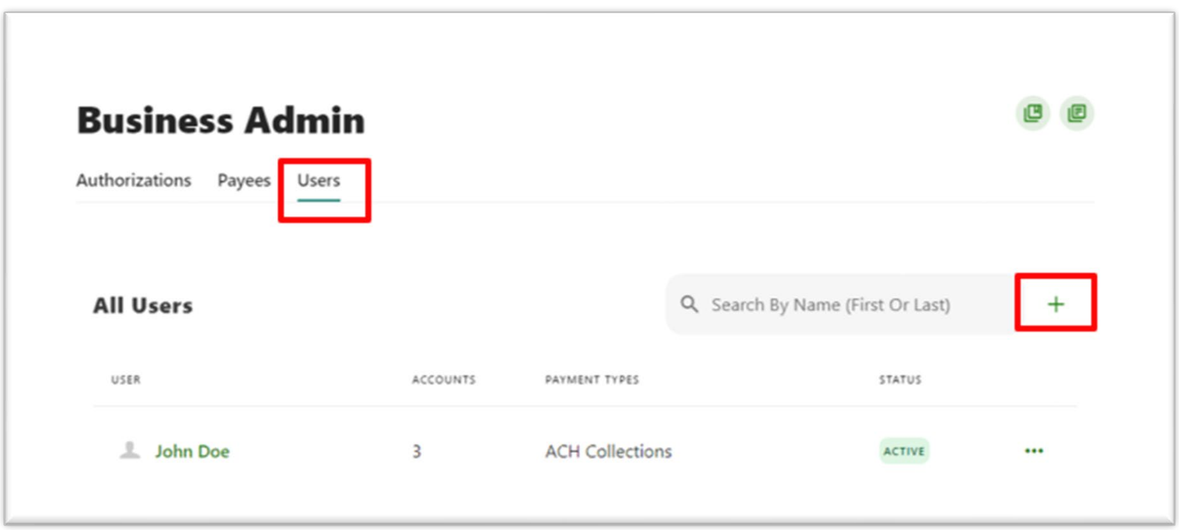
Creating a User

There are two easy ways to create a sub user in the Business Connect platform by either creating a new user or by copying an existing user. Each option is explained in detail below.

Create a New Sub User

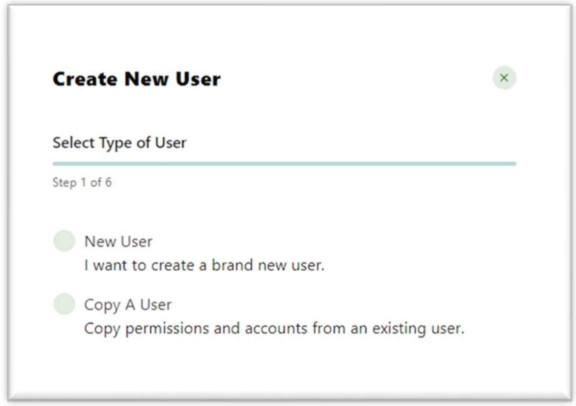
To create a new sub user:

1. Access the Commercial Tab and the Business Admin option.
2. Click the **Users** tab.
3. Click the **plus (+)** button next to the Search box in the top right.



4. The *Create New User* window will display. You may select to add a **New User** or **Copy a User** and copy the permissions and accounts from an existing user.

5. We will 1st demonstrate the **New User** option.

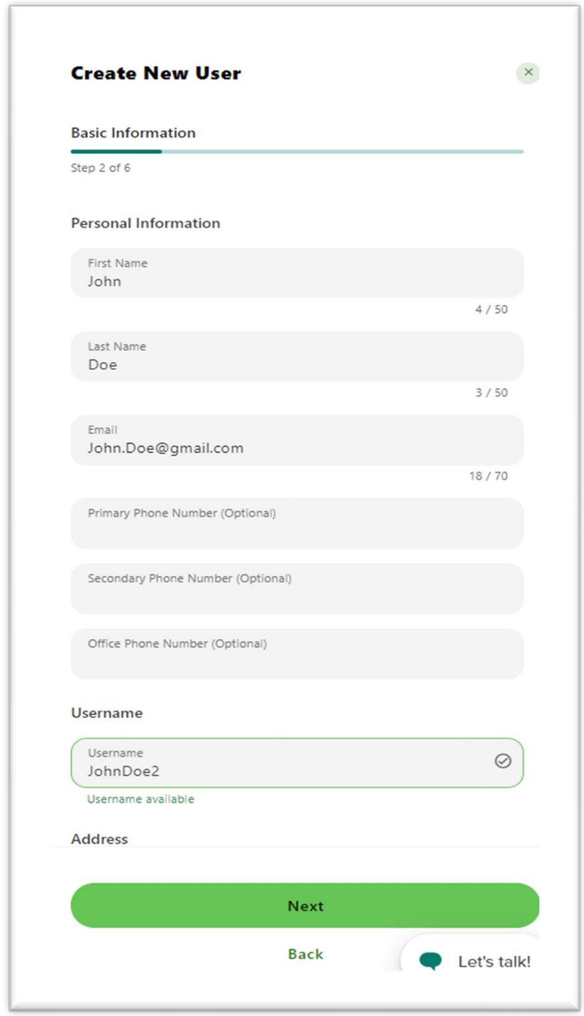


6. Enter *Basic Information* for the new user under **Personal Information**: First & Last Name, Email, Phone (Primary & Secondary & Office Phone Number).

7. Enter in the **Username** for the sub user.

   Note: Usernames must be unique. If the username entered is in use, an error message will display and the system will prevent the Company Admin from assigning duplicate usernames.

8. Continue, by entering in the **Address** for the sub user, if desired. Hit **next** when complete.

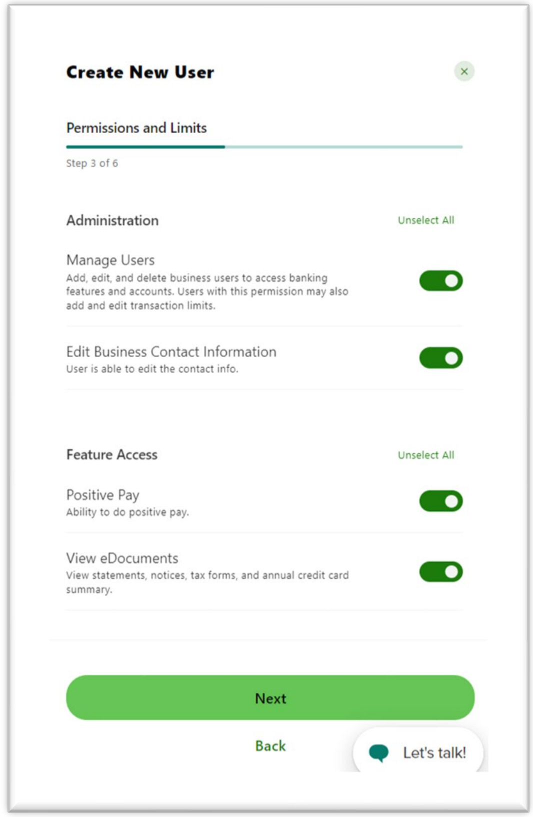


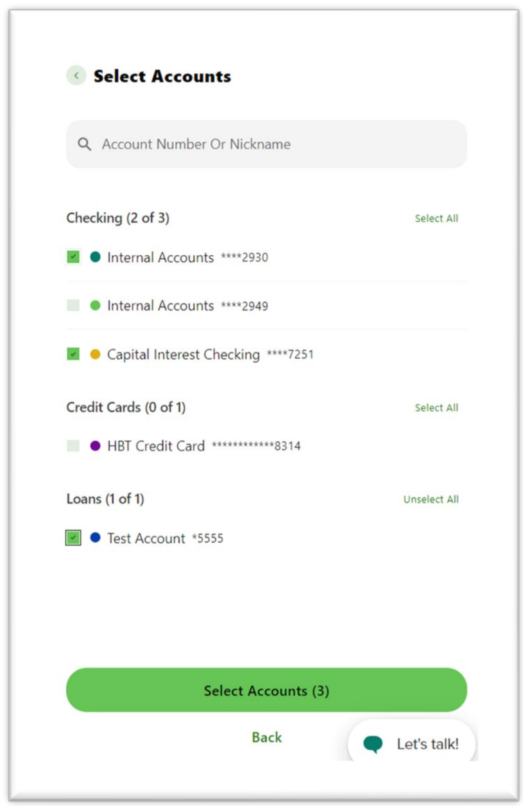
9. Enter the **Permission, Limits, and Feature Flags** for the new user. Hit **next** when complete.

Permissions include:

a. Administration
b. Feature Access
c. Payment Types
d. Payment Destination
e. Templates
f. Receivables

Note: You can edit the permissions once you create the user.



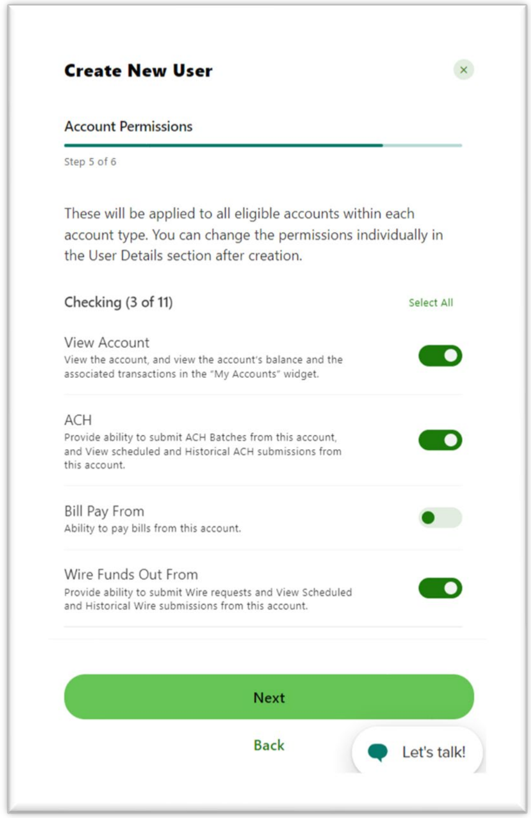


10. In the *Accounts* Window, hit **Select Accounts** to display a list of accounts for that sub user. Select the accounts you would like applicable for the sub user and hit **Select Accounts**.

    Note: The Business Connect system will display a success message with the number of Accounts added for the sub user. Under the text there is an option to add/remove accounts for that sub user.

11. The *Account Permissions* screen will appear with account level permissions. Select the wanted account level permissions by selecting each individual permission or by using the **Select All** option to automatically select all fields. Hit **next** when complete.

Note: You can edit the permissions once you create the user.

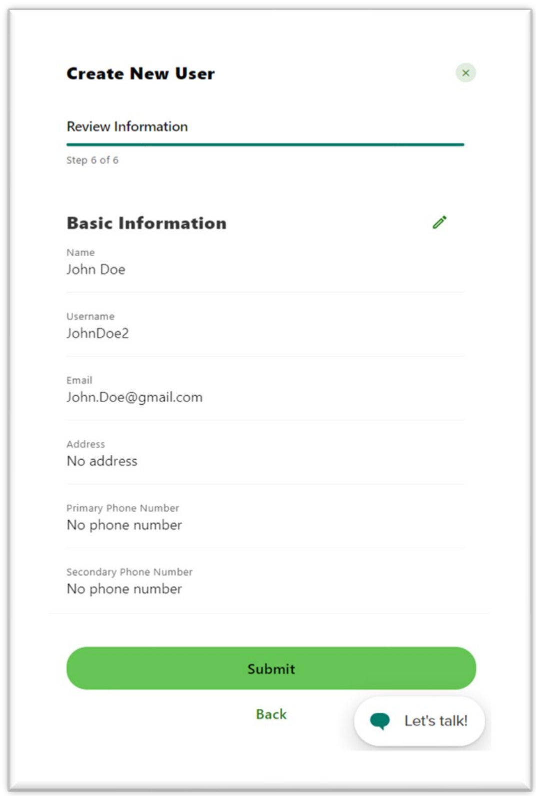


12. The *Review Information* screen appears, which allows you to review and edit all entries made. To edit a category hit the **Edit (pencil icon)** button next to the category name. Categories include: Basic Information, Permissions, Accounts, & Account permissions.

13. One you select **submit** you will be asked to complete a verification code. Click **Send Code** to receive a code to your master user's email.

14. Enter in the Code and select **Verify**.

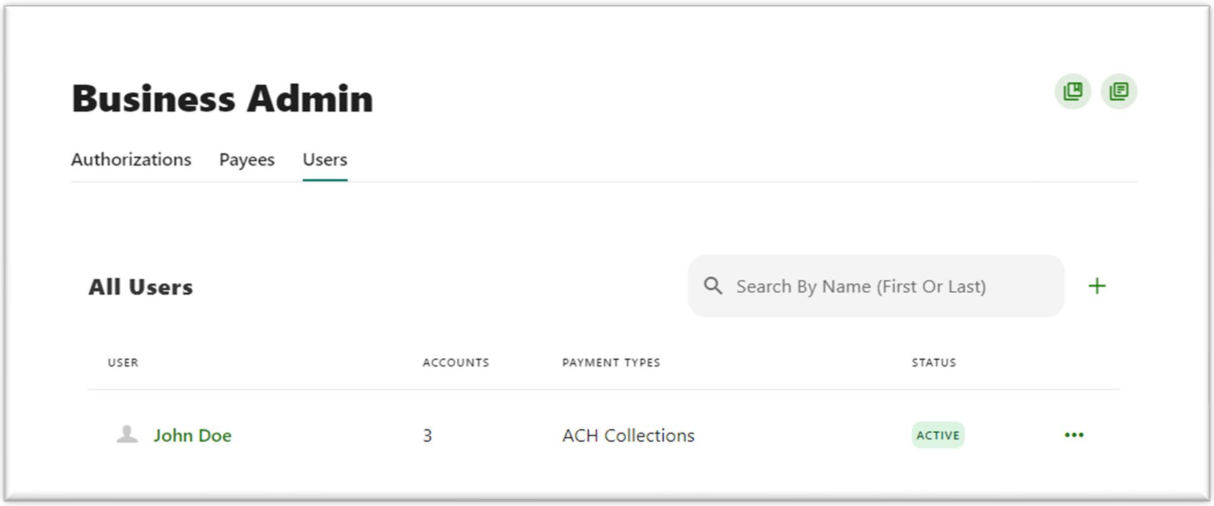
15. Once the code has been entered and verified a success message will display indicating the sub user has been successfully added.

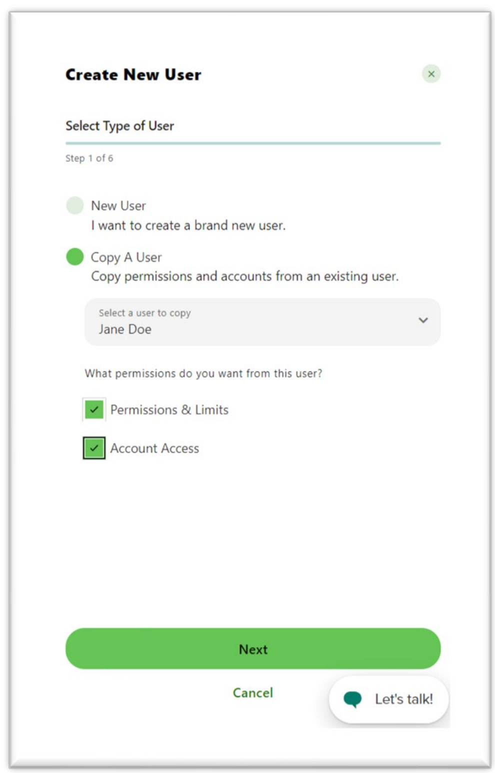


Copy User

To copy an existing sub user.

1. Access the Commercial Tab and the Business Admin option.
2. Click the **Users** tab.
3. Click the **plus (+)** button next to the Search box in the top right.





4. The *Create New User* window will display. Select **Copy a User**.
5. In the drop-down menu, choose the user who you wish to copy, then either:

   Check **Permissions & Limits** to copy that user's permissions and limits.

   OR

   Check **Account Access** to copy the users Access permissions.

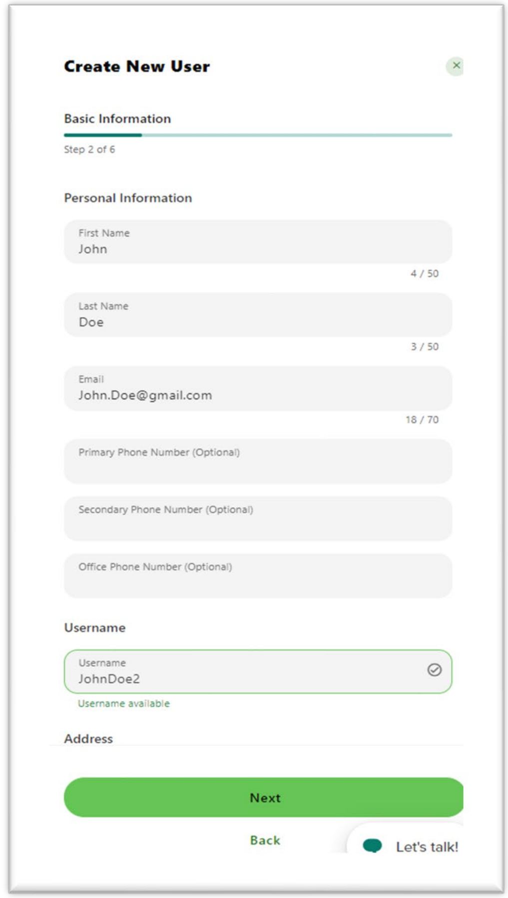
   a. Click **Next** when complete.

6. Enter *Basic Information* for the new user under **Personal Information**: First & Last Name, Email, Phone (Primary & Secondary & Office Phone Number).

7. Enter in the **Username** for the sub user.

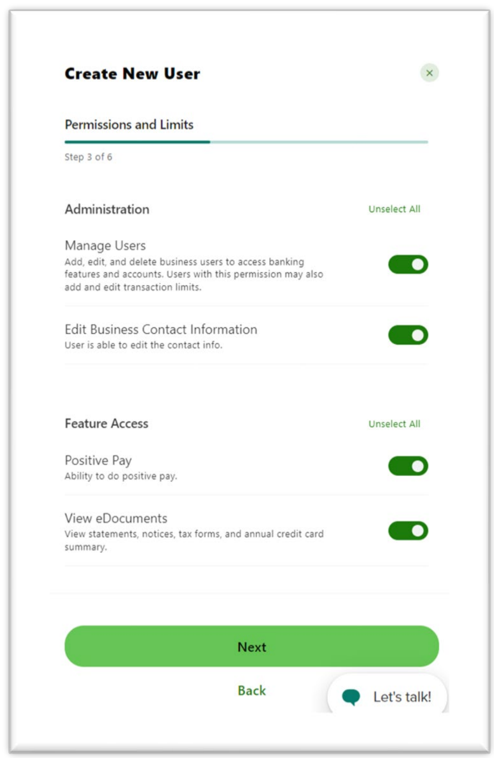
   Note: Usernames must be unique. If the username entered is in use, an error message will display and the system will prevent the master user from assigning duplicate usernames.

8. Enter in the **Address** for the sub user, if desired. Select **Next** when complete.

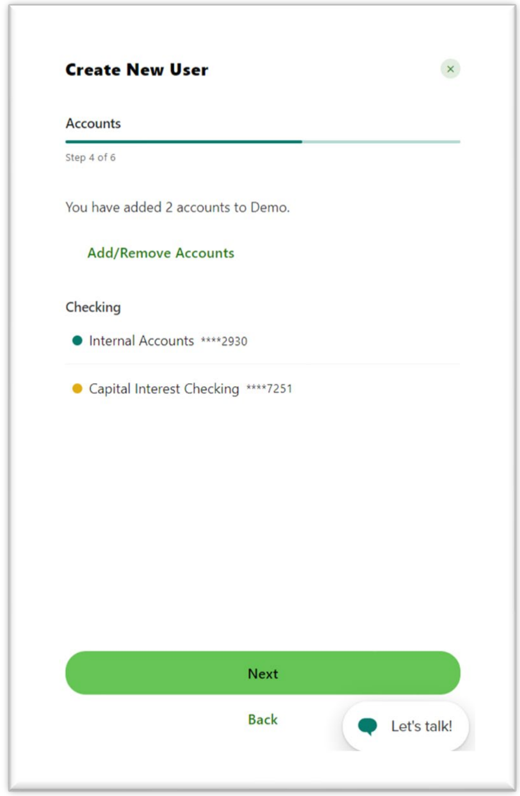


9. A List of **Permissions and Limits** displays. Since you are copying a user, these fields should be pre-populated with data from the copied user. You may edit the permissions and limits as many times as you like. Select **Next** when complete.

   Note: You can edit the permissions once you create the user.

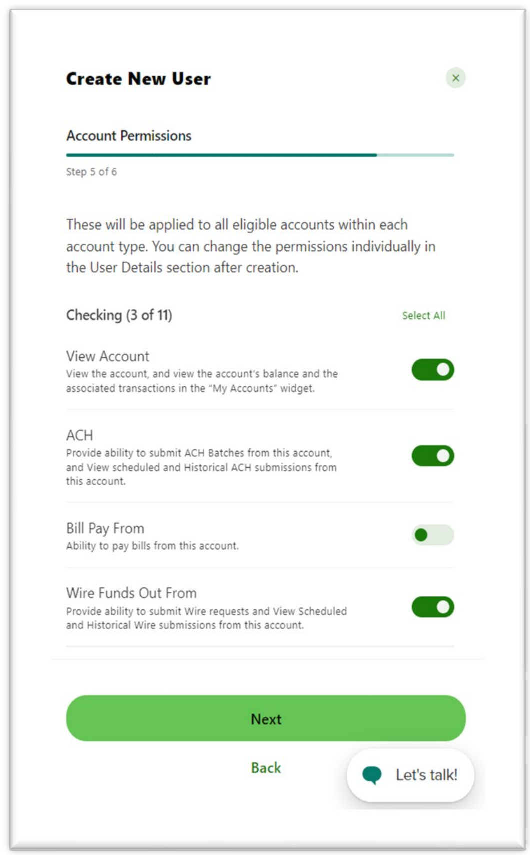


10. The following page displays **Accounts selected in the cloned user.** You may add or remove accounts by selecting the Add/Remove Accounts option.



11. The **Account Permissions** screen will appear with account level permissions. Select the wanted account level permissions by selecting each individual permission or by using the **Select All** to automatically select all fields. Since you are copying a user, the fields should be pre-populated. Click **Next** when complete.

    Note: You can edit the permissions once you create the user.



12. The *Review Information* screen appears, which allows you to review and edit all of the entries made. To edit a category hit the **Edit (pencil icon)** button next to the category name.

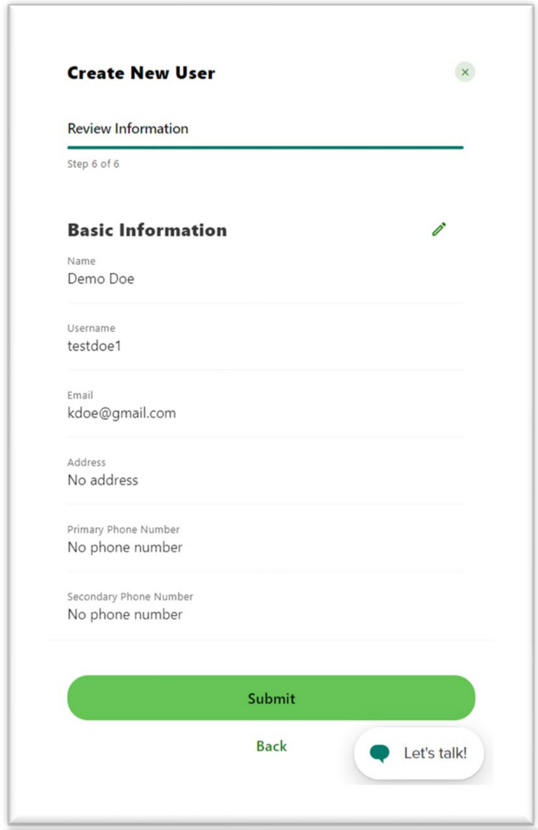
    a. Review Information Categories:

        i. Basic Information

        ii. Permissions

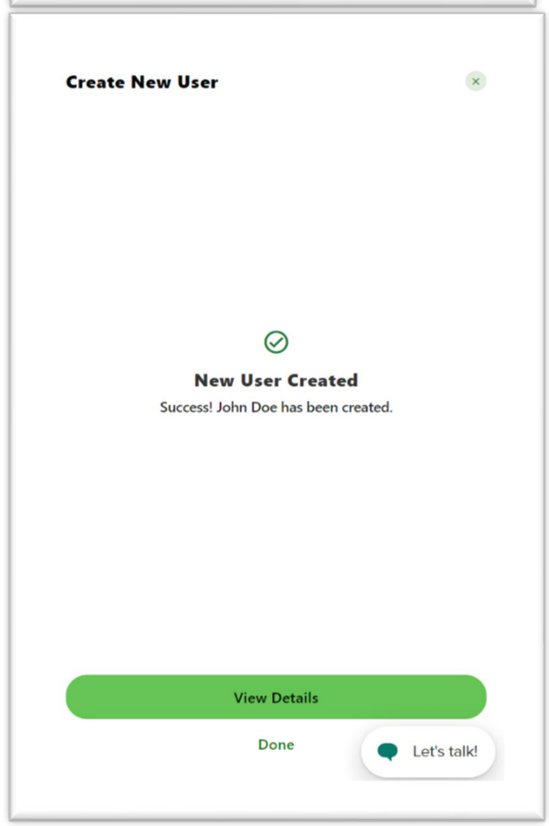
        iii. Accounts

        iv. Account permissions



13. When completed with reviewing your copied sub users details, click **Submit.** Then a Verification code will be sent to the master user to verify identity. Once you receive the code, enter the code into the *Enter Code* field and click **Verify.**

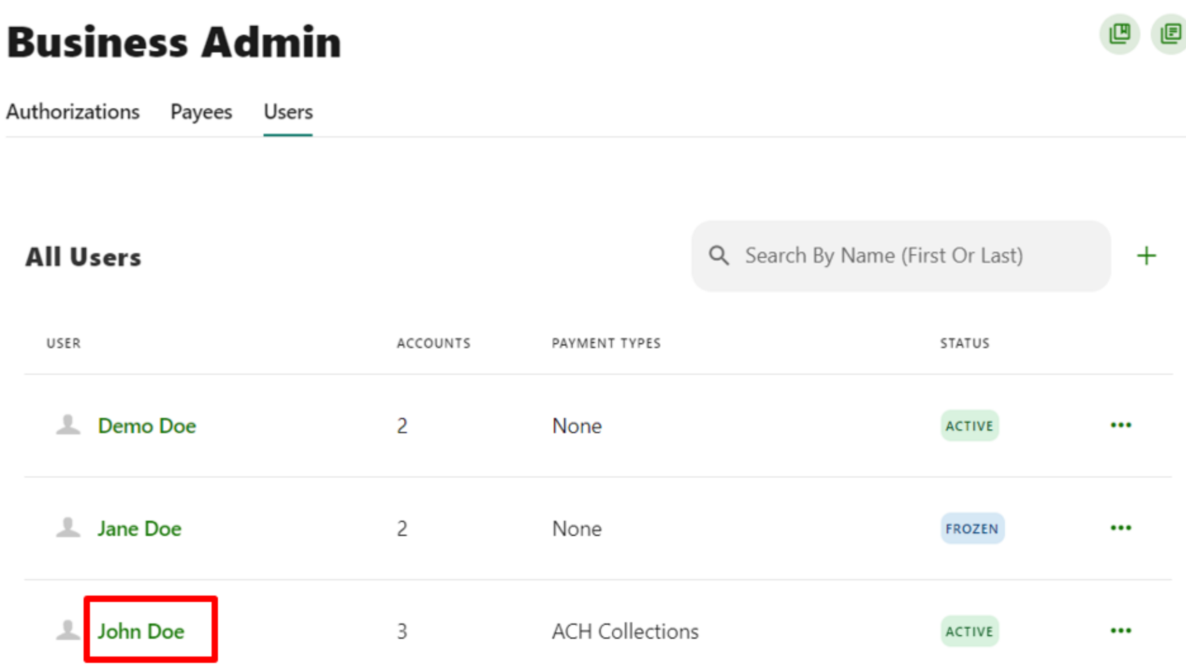
14. A success message will display indicating the new copied user has been created.



Sub User Management – View and Edit Permissions

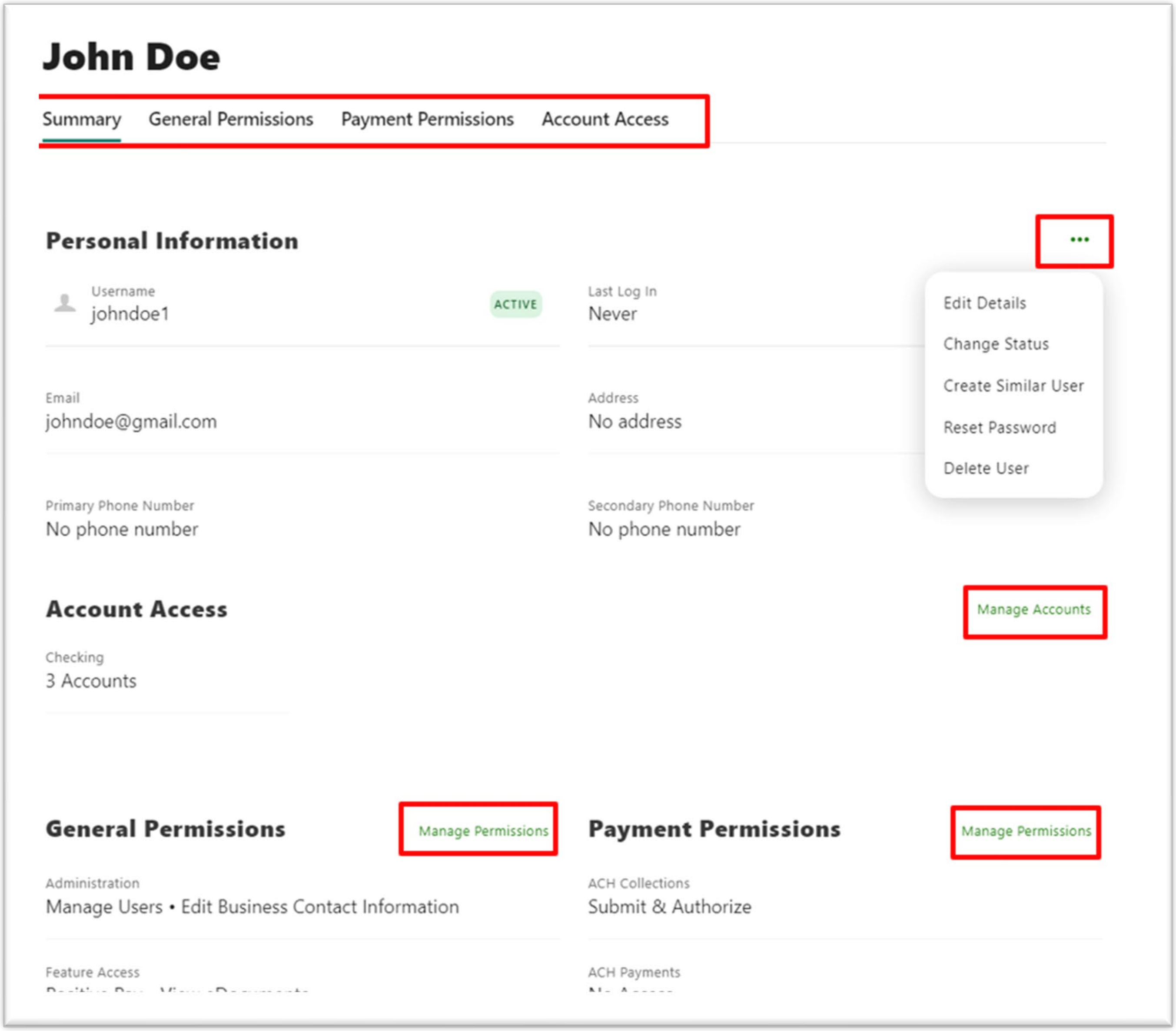
The Business Connect platform enables you to easily view and edit a sub user's Permissions by utilizing the *Business Admin* option. To view or edit a sub user's Permissions:

1. Access the Commercial Tab and the Business Admin option.
2. Click the **Users** tab.
3. Select the User who you would like to view/edit permissions for by clicking on their name.



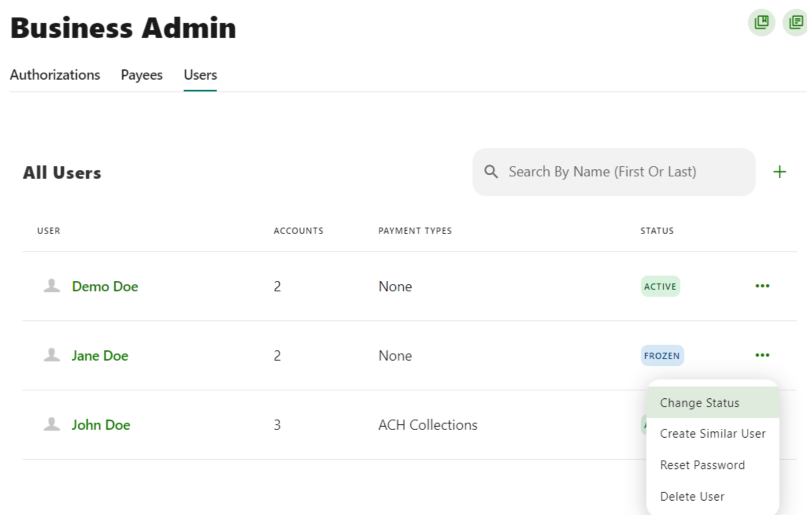
Once you are within a Subuser, you will be able to view and edit their Personal Information, General Permissions, Payment Permissions, and their account level permissions.

1. Click the three dots (…) next to personal information to open a drop-down menu displaying options such as: Edit Details, Change Status, Create Similar user, Reset Password, and Delete User.
2. You can edit permissions by selecting the **Manage Permissions** or **Manage Accounts** options and updating the applicable permissions and/or accounts as shown below.


John Doe
Summary
General Permissions
Payment Permissions
Account Access
Personal Information
Username
johndoe1
ACTIVE
Last Log In
Never
Edit Details
Change Status
Create Similar User
Reset Password
Delete User
Email
johndoe@gmail.com
Address
No address
Primary Phone Number
No phone number
Secondary Phone Number
No phone number
Account Access
Manage Accounts
Checking
3 Accounts
General Permissions
Manage Permissions
Payment Permissions
Manage Permissions
Administration
Manage Users • Edit Business Contact Information
ACH Collections
Submit & Authorize
Feature Access
ACH Payments

Deleting a User

1. Access the Commercial Tab and the Business Admin option.



2. Click the **Users** tab.
3. Find the sub user you are going to delete and select the three dots (...) next to their name.
4. Select **Delete User** from those options.
5. A notification will appear to ask if you would like to delete this user.

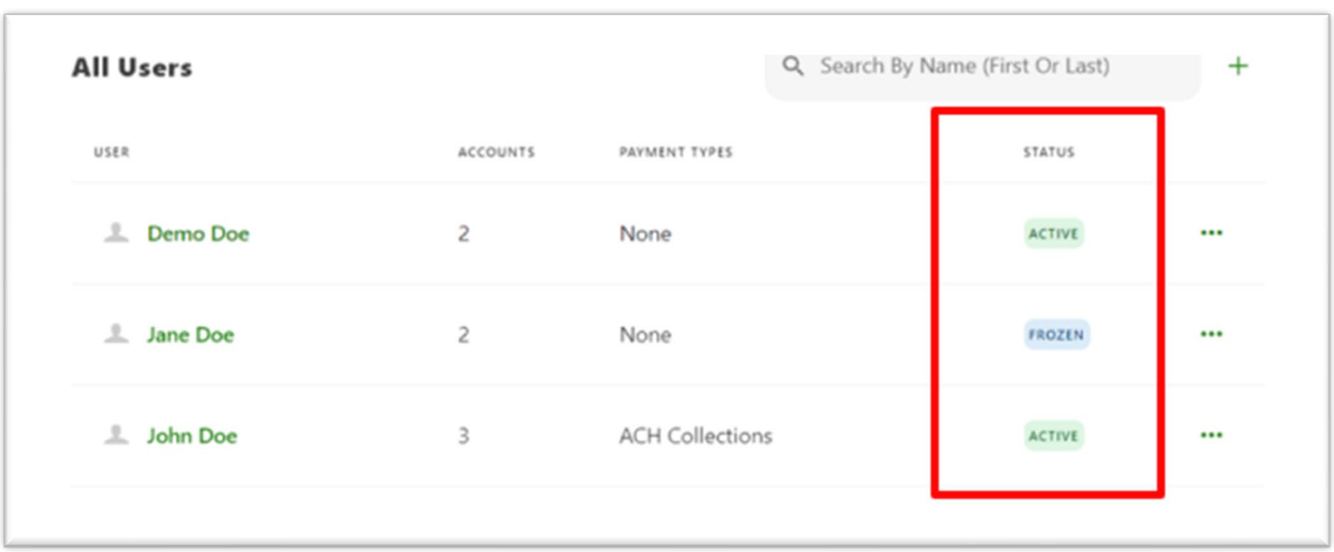
   Note: Once you delete a sub user, you cannot undo it.

6. Select **Delete**.

Freezing / Unfreezing

You may see if a sub user is frozen or Active by accessing the *Business Admin* option and selecting the **Users** tab. Under the Status column, you can see the account status for that sub user.

Note: Freezing a sub user will prohibit the user to login or access online banking.

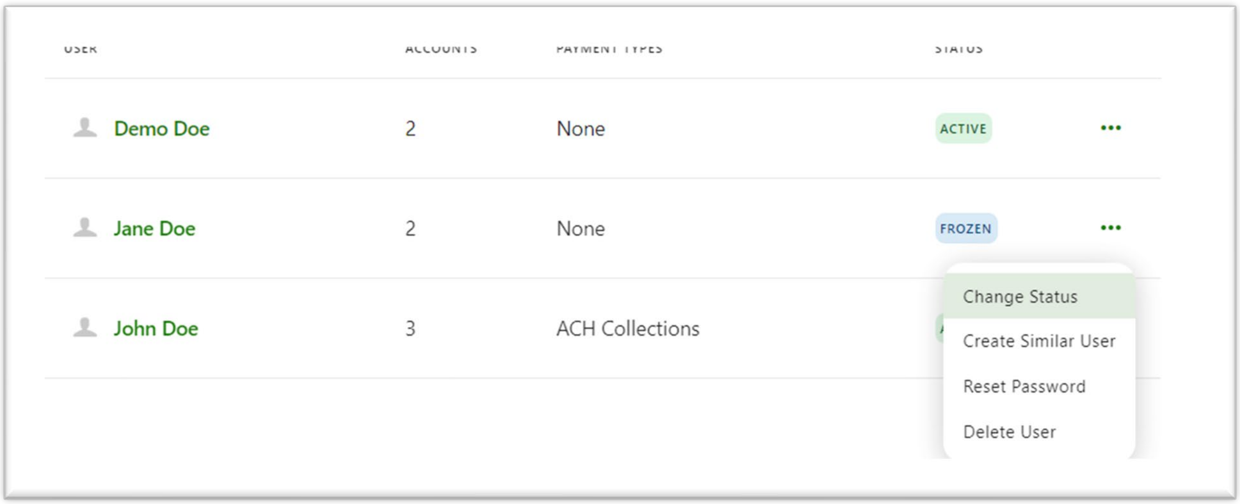


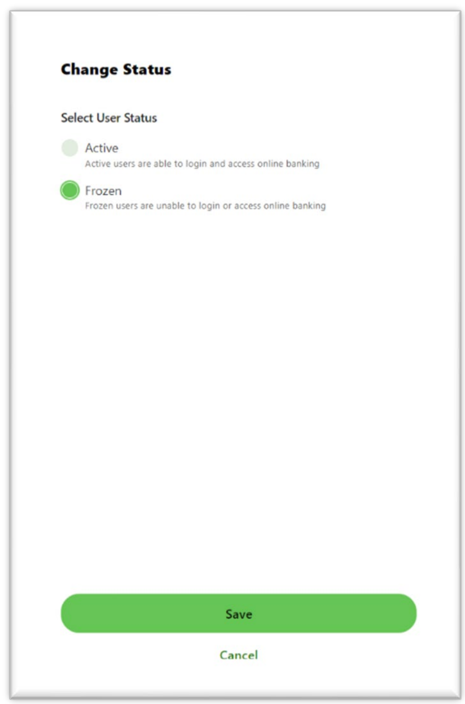
Change Status of a User (Frozen/Active)

1. Access the Commercial Tab and the Business Admin option.

2. Click the **Users** tab.

3. Find the user you are going to freeze/unfreeze and select the three dots next to their name and select **Change Status**.





4. Select **Frozen** to Freeze that sub user's access or Select Active to unfreeze the sub user's access. Then select **Save.** You will then be required to authenticate this request with an authorization code. Select **Send Code.**

5. Once you receive the code, enter it into the *Enter Code* field and click **Verify.**

6. A success message will display indicating the status change was completed.

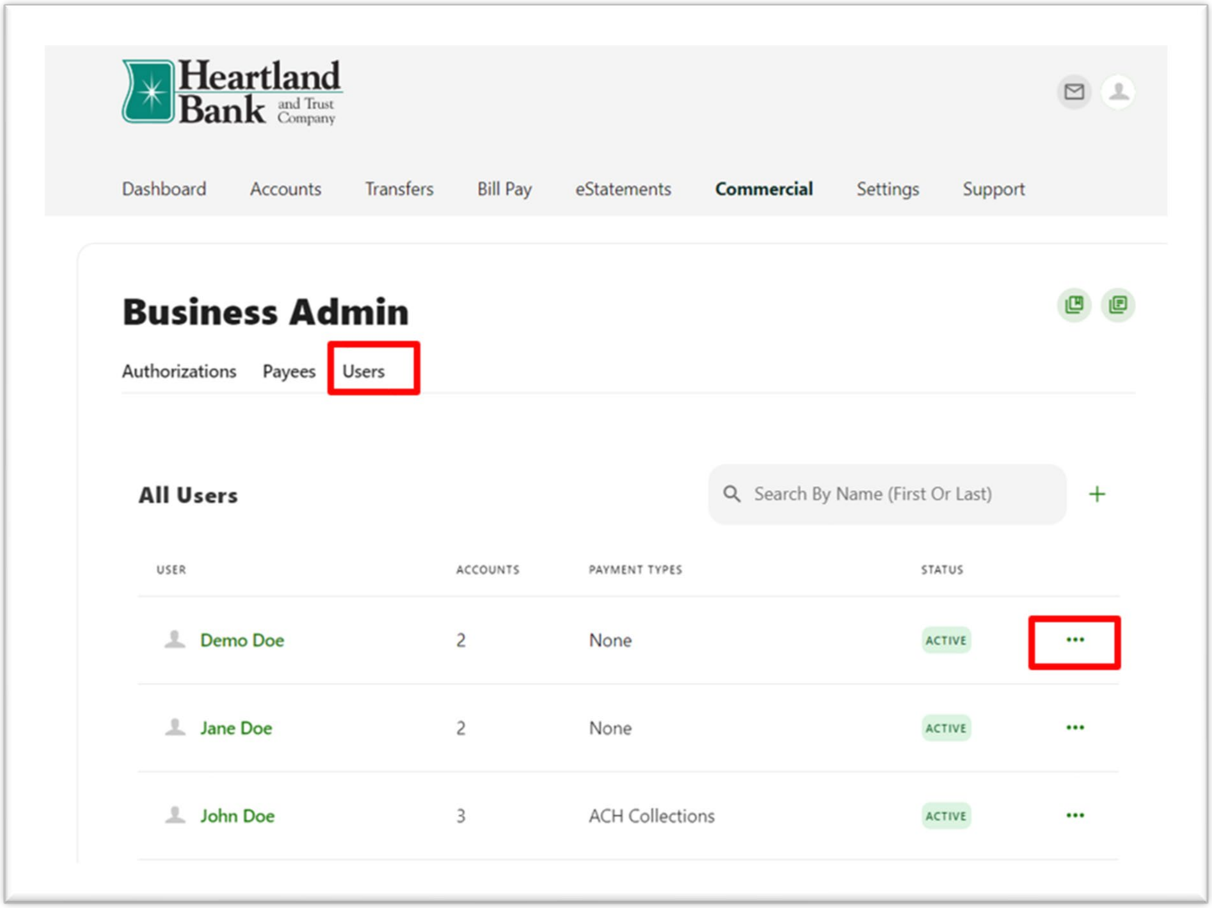
7. Verify that the sub user has been switched to frozen by seeing the icon change from Active (green) to Frozen (blue).

Passwords Resets

1. Access the Commercial Tab and the Business Admin option.

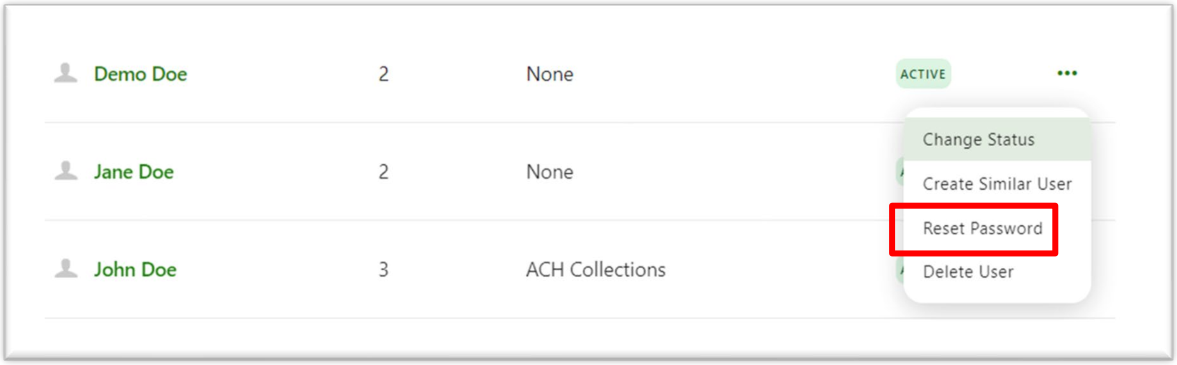
2. Click the **Users** tab.

3. Find the sub user you are going to change the password for and select the three dots (...) next to their name.



4. A drop-down menu will appear with the following options:

   a. Change Status
   b. Create Similar User
   c. Reset Password
   d. Delete User



5. Select **Reset Password** from those options.

6. The *Reset Password* page will appear. Select the method to receive a new password and fill out the optional reasoning for the new password if needed. Select **Send New Password** when complete.

7. A verification screen will appear and you must verify the code that was sent.

   Note: Once verified, the sub user will get instructions on how to change their password.

8. The Business Connect system will display a success message indicating that the Password was successfully reset.