

Business Connect User Guide

User Management Guide

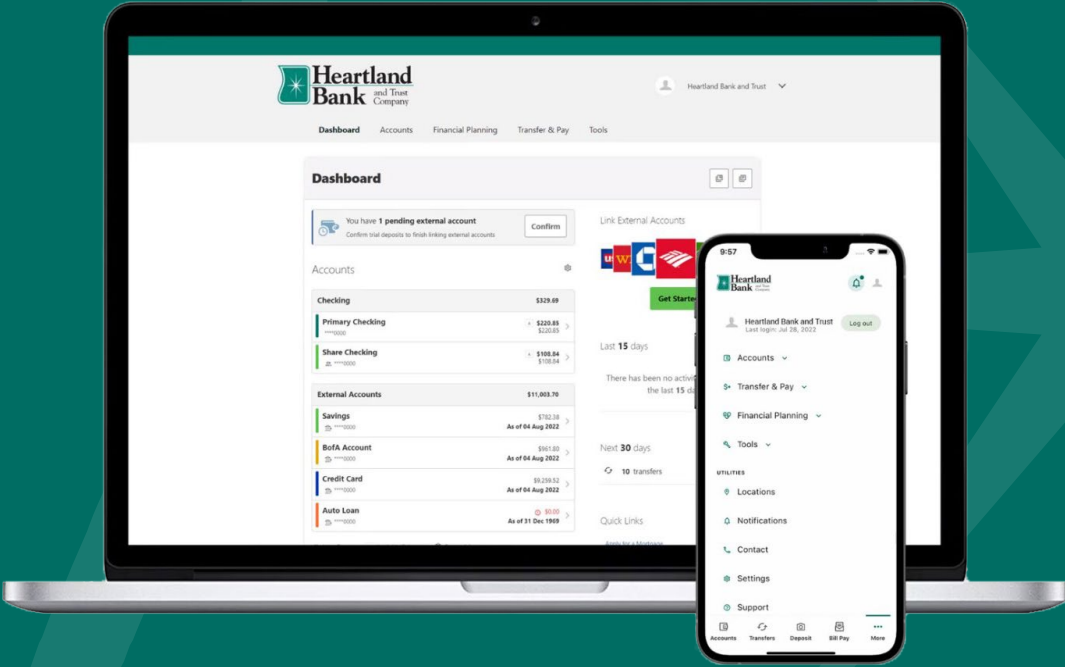


Table of Contents

Creating a User	2
Create a New Sub User	2
Copy User	6
Sub User Management – View and Edit Permissions	10
Deleting a User	12
Freezing / Unfreezing	12
Passwords Resets	14

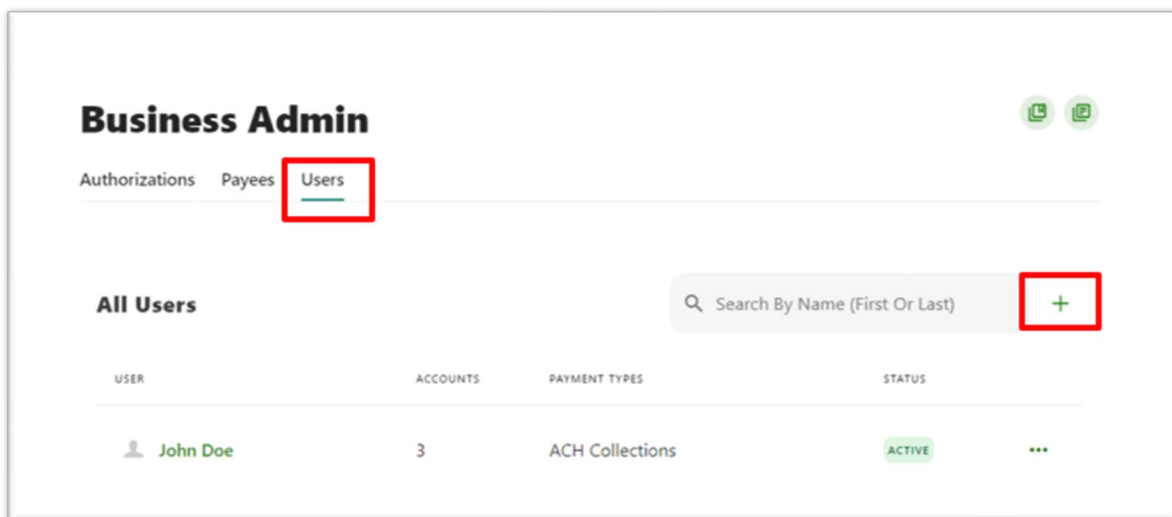
Creating a User

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.



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

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

- 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.

The screenshot shows the 'Create New User' interface, specifically the 'Permissions and Limits' section. It is Step 3 of 6. The interface is divided into two main sections: 'Administration' and 'Feature Access'. Under 'Administration', there are two items: 'Manage Users' (description: 'Add, edit, and delete business users to access banking features and accounts. Users with this permission may also add and edit transaction limits.') and 'Edit Business Contact Information' (description: 'User is able to edit the contact info.'). Both have green toggle switches turned on. Under 'Feature Access', there are two items: 'Positive Pay' (description: 'Ability to do positive pay.') and 'View eDocuments' (description: 'View statements, notices, tax forms, and annual credit card summary.'). Both have green toggle switches turned on. At the bottom, there is a large green 'Next' button, a 'Back' button, and a 'Let's talk!' chat icon.

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.

The screenshot shows the 'Select Accounts' window. It has a search bar at the top with the placeholder text 'Account Number Or Nickname'. Below the search bar, there are three categories of accounts, each with a 'Select All' link. The first category is 'Checking (2 of 3)'. It contains three items: 'Internal Accounts ****2930' (checked), 'Internal Accounts ****2949' (unchecked), and 'Capital Interest Checking ****7251' (checked). The second category is 'Credit Cards (0 of 1)'. It contains one item: 'HBT Credit Card *****8314' (unchecked). The third category is 'Loans (1 of 1)'. It contains one item: 'Test Account *5555' (checked). At the bottom, there is a large green button labeled 'Select Accounts (3)', a 'Back' button, and a 'Let's talk!' chat icon.

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.

Create New User ✕

Account Permissions

Step 5 of 6

These will be applied to all eligible accounts within each account type. You can change the permissions individually in the User Details section after creation.

Checking (3 of 11) Select All

View Account
View the account, and view the account's balance and the associated transactions in the "My Accounts" widget.

ACH
Provide ability to submit ACH Batches from this account, and View scheduled and Historical ACH submissions from this account.

Bill Pay From
Ability to pay bills from this account.

Wire Funds Out From
Provide ability to submit Wire requests and View Scheduled and Historical Wire submissions from this account.

Next

Back Let's talk!

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.

Create New User ✕

Review Information

Step 6 of 6

Basic Information ✎

Name
John Doe

Username
JohnDoe2

Email
John.Doe@gmail.com

Address
No address

Primary Phone Number
No phone number

Secondary Phone Number
No phone number

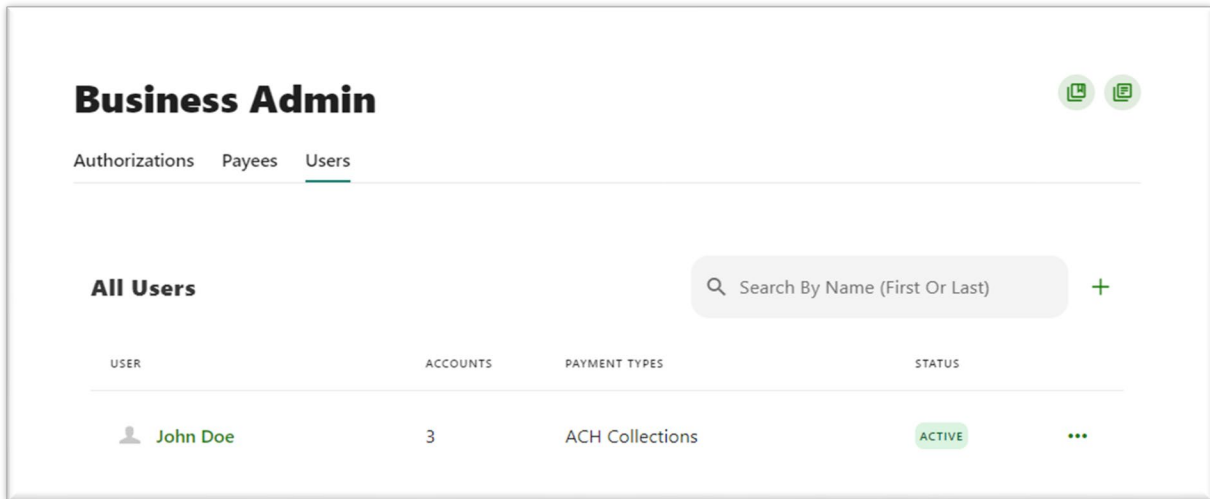
Submit

Back Let's talk!

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.



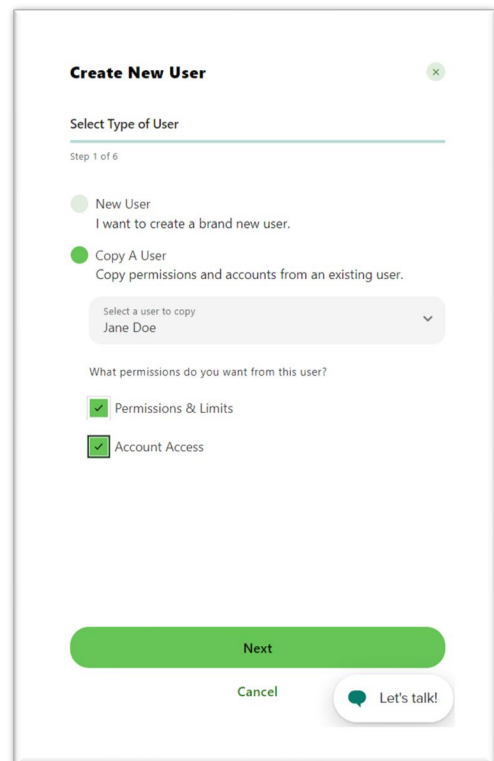
4. The *Create New User* window will display. Select **Copy a User**.
5. In the drop-down menu, choose the user who you wish to copy, then either:

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.

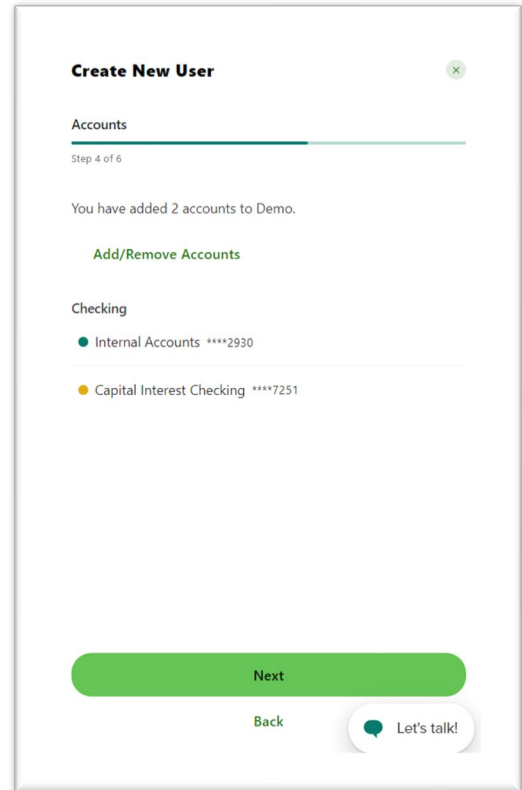
The screenshot shows the 'Create New User' form at Step 2 of 6, titled 'Personal Information'. It includes fields for First Name (John, 4/50), Last Name (Doe, 3/50), Email (John.Doe@gmail.com, 18/70), Primary Phone Number (Optional), Secondary Phone Number (Optional), and Office Phone Number (Optional). The Username field contains 'JohnDoe2' and is marked as available. At the bottom, there is a green 'Next' button, a 'Back' button, and a 'Let's talk!' button with a speech bubble icon.

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.

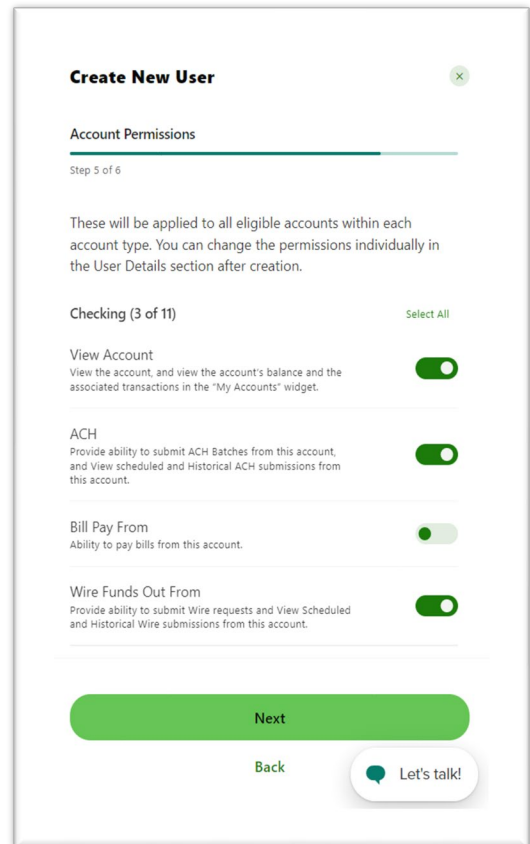
The screenshot shows the 'Create New User' form at Step 3 of 6, titled 'Permissions and Limits'. It features sections for 'Administration' and 'Feature Access', each with an 'Unselect All' link. Under 'Administration', 'Manage Users' (Add, edit, and delete business users to access banking features and accounts. Users with this permission may also add and edit transaction limits.) and 'Edit Business Contact Information' (User is able to edit the contact info.) are both toggled on. Under 'Feature Access', 'Positive Pay' (Ability to do positive pay.) and 'View eDocuments' (View statements, notices, tax forms, and annual credit card summary.) are also toggled on. At the bottom, there is a green 'Next' button, a 'Back' button, and a 'Let's talk!' button with a speech bubble icon.

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.

Create New User ✕

Review Information

Step 6 of 6

Basic Information ✎

Name
Demo Doe

Username
testdoe1

Email
kdoe@gmail.com

Address
No address

Primary Phone Number
No phone number

Secondary Phone Number
No phone number

Submit

[Back](#) Let's talk!

Create New User ✕

✓

New User Created

Success! John Doe has been created.

View Details

[Done](#) Let's talk!

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.

Business Admin






Authorizations Payees Users

All Users

Search By Name (First Or Last)



USER	ACCOUNTS	PAYMENT TYPES	STATUS	
 Demo Doe	2	None	ACTIVE	...
 Jane Doe	2	None	FROZEN	...
 John Doe	3	ACH Collections	ACTIVE	...


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

Email: johndoe@gmail.com Address: No address

Primary Phone Number: No phone number Secondary Phone Number: No phone number



- Edit Details
- Change Status
- Create Similar User
- Reset Password
- Delete User

Account Access

Checking
3 Accounts

[Manage Accounts](#)

General Permissions

[Manage Permissions](#)

Administration
Manage Users • Edit Business Contact Information

Payment Permissions

[Manage Permissions](#)

ACH Collections
Submit & Authorize

Feature Access
Deposit Slip • Manage Documents

ACH Payments
Manage Accounts

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**.

Business Admin

Authorizations Payees Users

All Users

Search By Name (First Or Last) +

USER	ACCOUNTS	PAYMENT TYPES	STATUS	
Demo Doe	2	None	ACTIVE	⋮
Jane Doe	2	None	FROZEN	⋮
John Doe	3	ACH Collections		

Change Status

Create Similar User

Reset Password

Delete User

Freezing / Unfreezing

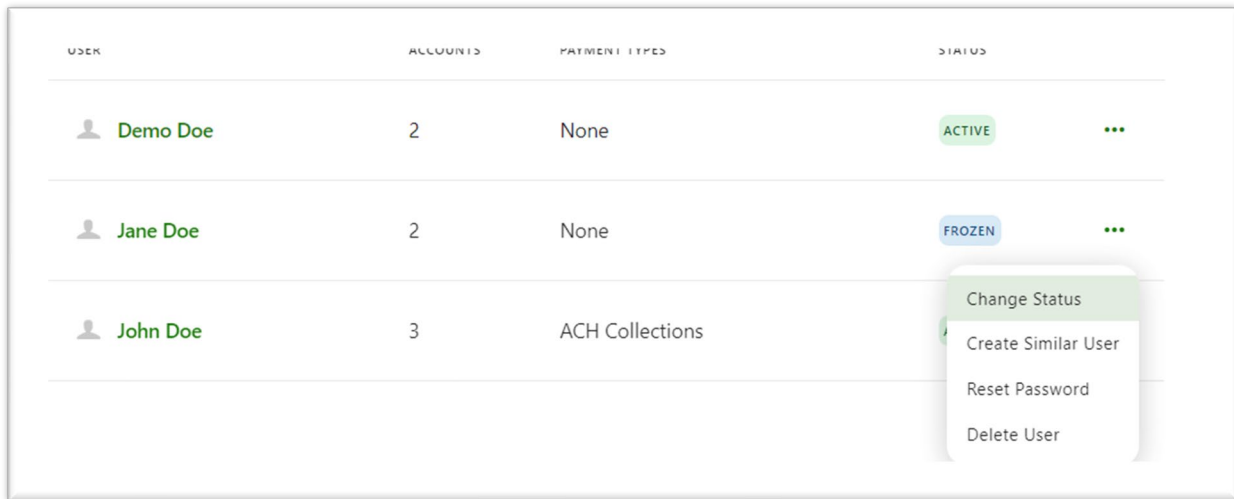
You may see if a sub user is frozen or Active by accessing the *Business Admin* option and selecting the **Users** tab. Under the Status column, you can see the account status for that sub user.

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

USER	ACCOUNTS	PAYMENT TYPES	STATUS	
Demo Doe	2	None	ACTIVE	⋮
Jane Doe	2	None	FROZEN	⋮
John Doe	3	ACH Collections	ACTIVE	⋮

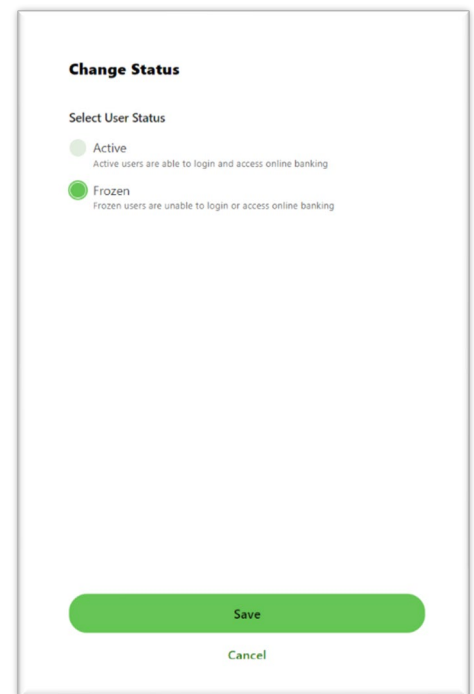
Change Status of a User (Frozen/Active)

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**.



USER	ACCOUNTS	PAYMENT TYPES	STATUS	
Demo Doe	2	None	ACTIVE	⋮
Jane Doe	2	None	FROZEN	⋮
John Doe	3	ACH Collections		<ul style="list-style-type: none">Change StatusCreate Similar UserReset PasswordDelete User

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).



Change Status

Select User Status

Active
Active users are able to login and access online banking

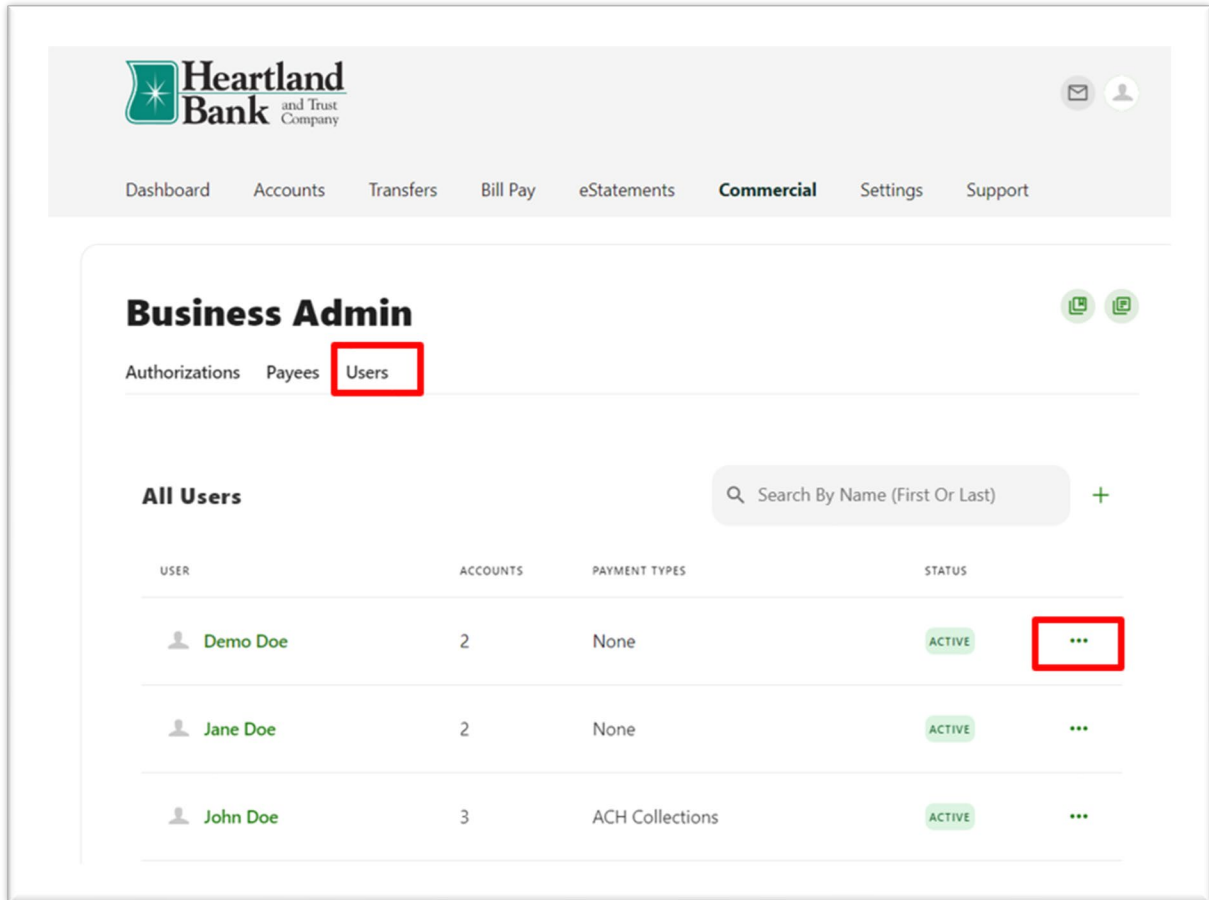
Frozen
Frozen users are unable to login or access online banking

Save




Cancel

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

 Demo Doe	2	None	ACTIVE	⋮
 Jane Doe	2	None		
 John Doe	3	ACH Collections		

- Change Status
- Create Similar User
- Reset Password**
- 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.

Reset Password

Select a method to receive a new password

Email
 A new password sent to your Email.

Email
 John.Doe@gmail.com

Reason for resetting password

Reason (Optional)