Business Online

Senior Administrator Guide

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Overview

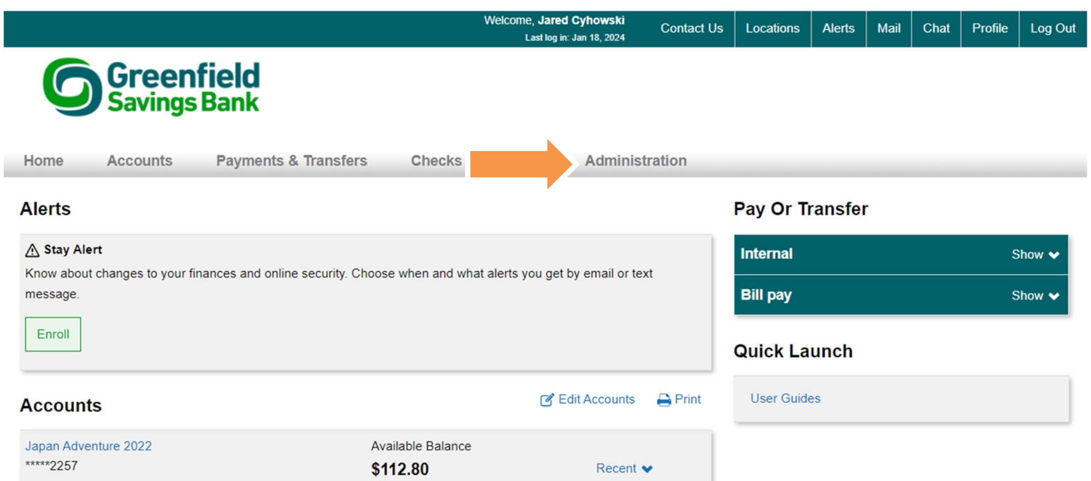
As the Senior Administrator for your business you will have some responsibilities in addition to processing transactions. When someone new needs access to Business Online you will create them in the system and grant them access to what they may need. You will also remove someone if they leave the company. This guide will walk you through the process of anything you may have to do as a Senior Administrator. In this guide it will cover all standard services, some of which may not apply to your company.

Maintaining Employees

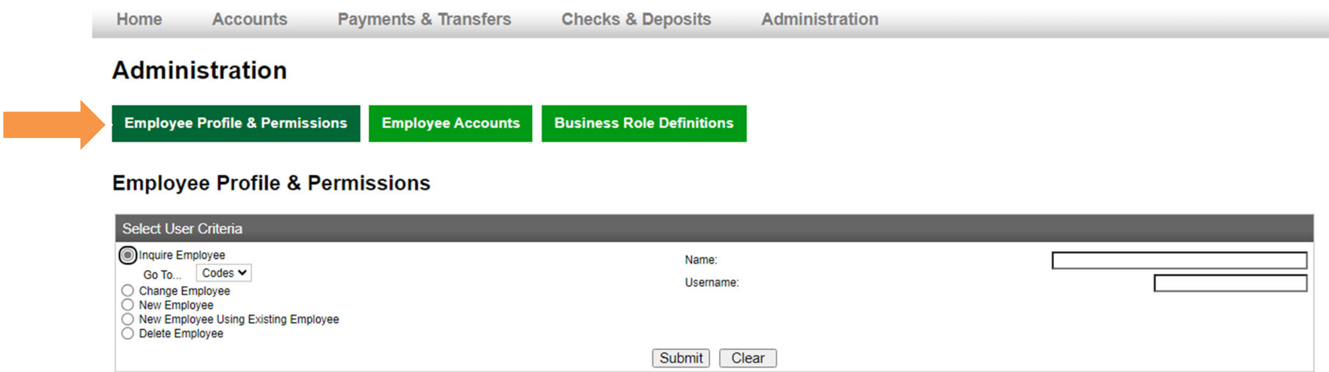
When a new employee needs access to the system you have the ability to grant them as much or as little access as they need. There are a few services that Greenfield Savings Bank will need to activate if necessary.

Adding a New Employee

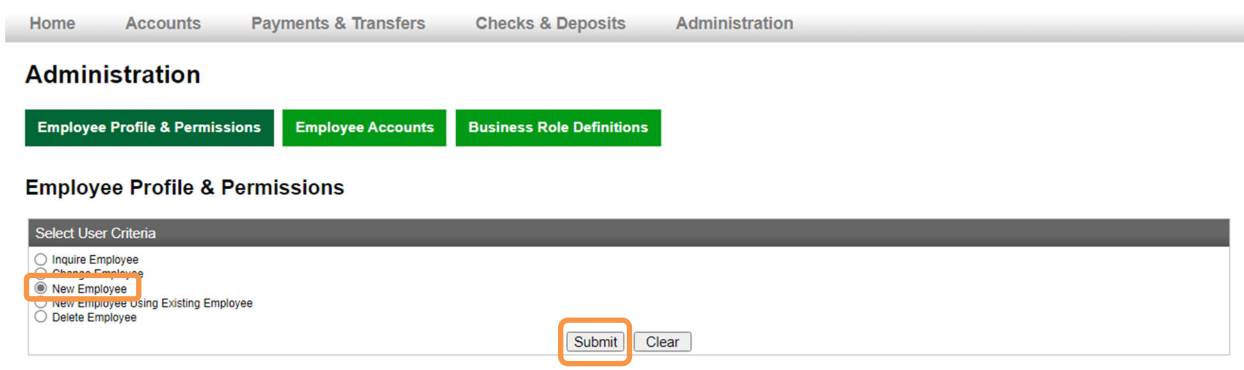
1. After you log in to Business Online, go to the Administration Tab.



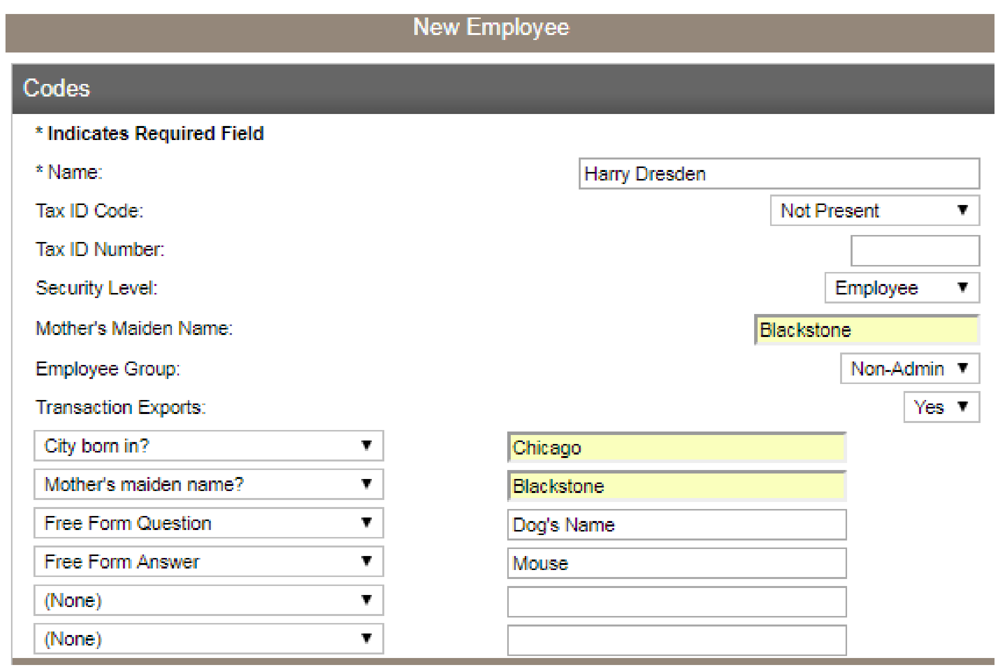
2. Select Employee Profile & Permissions



3. Select New Employee and click submit.

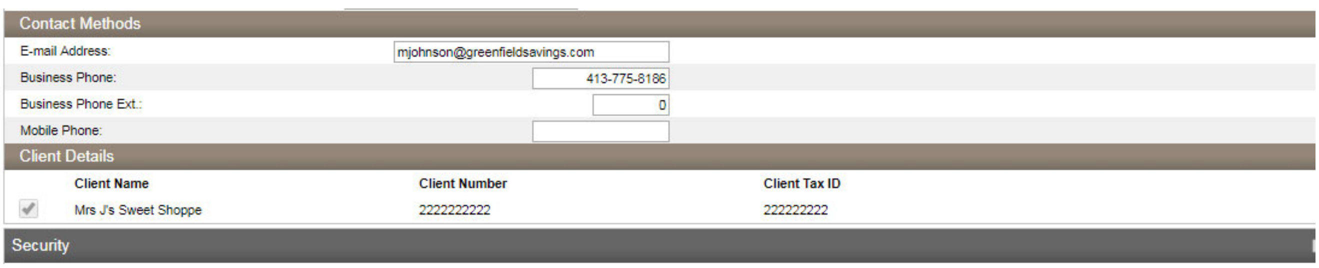


4. The next screen is broken down into sections. There will be an image followed by what should go into each section.

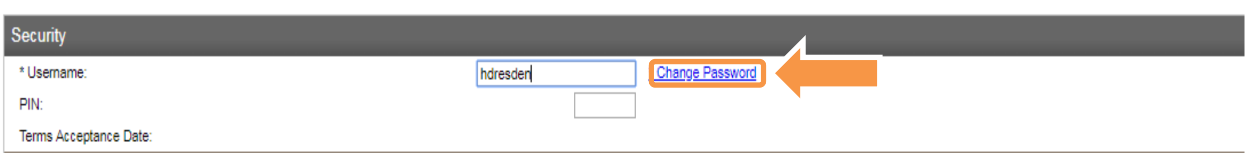


a. **Name** should be the full name of the new employee
b. **Security Level** is the user's approval authority. <u>Employee Level</u> will need approval to any Bill Payments sent. <u>Administrator Level</u> will be able to submit Bill Payments.
c. **Mother's Maiden Name:** You would put the employee's Mother's Maiden Name in this field.
d. **Employee Group** you select Admin or Non-Admin. Everyone aside from the Senior Admin should fall under the Non-Admin Group. **Note:** This feature may not be available for all companies. This does not affect access in any way.
e. **Transaction Exports** is where you grant the employee access to export transaction data. Select YES or NO.
f. **Verification Questions** are used when a user calls in and needs help from our Customer Service. We need to verify their identity before resetting a PIN or troubleshooting. If you use Date of Birth and Mother's Maiden Name you will just need one additional question.

Date of Birth which is not pictured above is on the right hand side of the screen. This can be used as one of the 3 security questions.

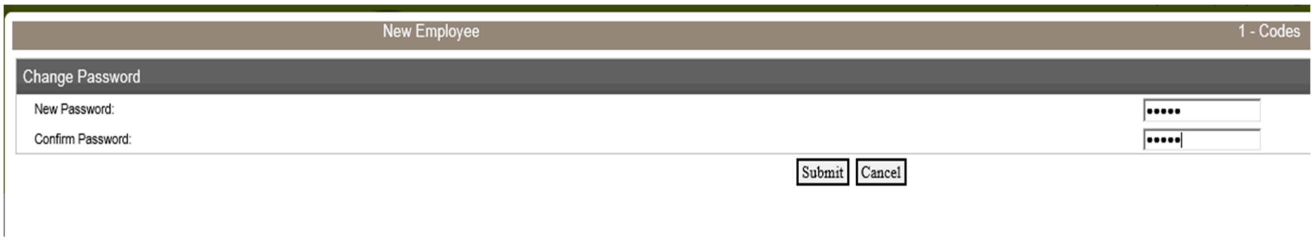


g. **E-mail Address** should be the email for the employee.
h. **Business Phone** does not need to be for business. This should be the best phone number to reach this individual.
i. **Client Details** is a section that will be filled out automatically. You do not need to change anything.

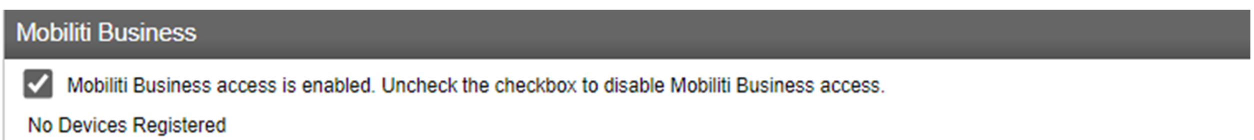


j. **Username** is something you will need to create for the employee. We recommend using the employee's first initial and last name. If you have an employee with a common name you will get an error message when you try to navigate to the next screen. The message will state "Username must be Unique". You would need to add the middle initial or a number at the end of the Username to make it unique.
k. **PIN** should be left blank.

l. **Change Password** is a link you'd need to click on to make the employee a temporary password for their first log in. Once you create a password click Submit.

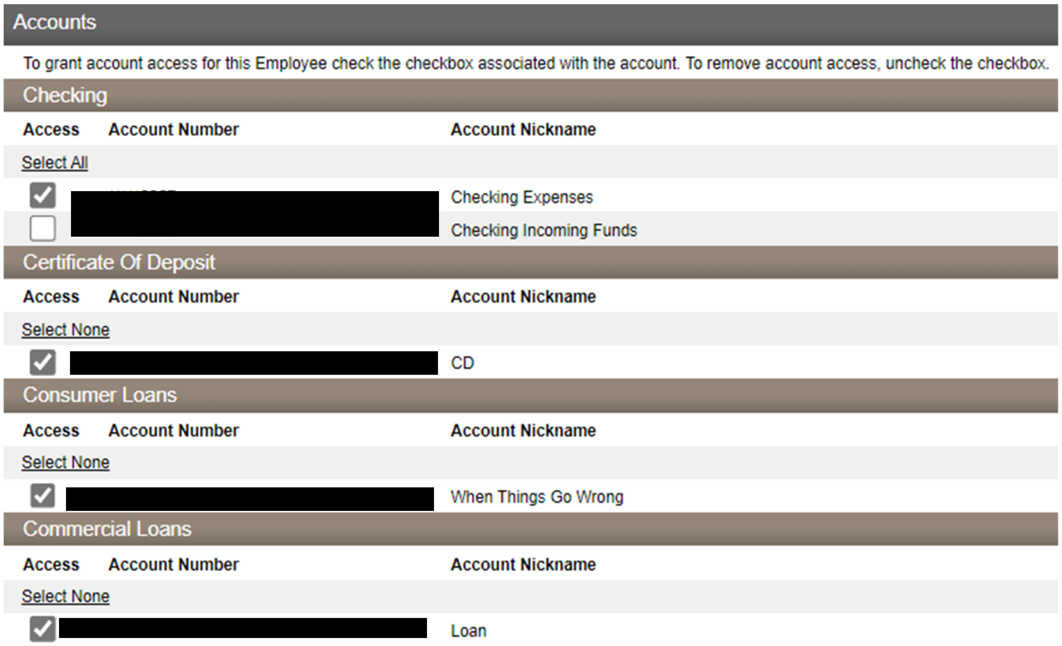


m. **Token Status** should be (None).
n. **Token Type** should (None).

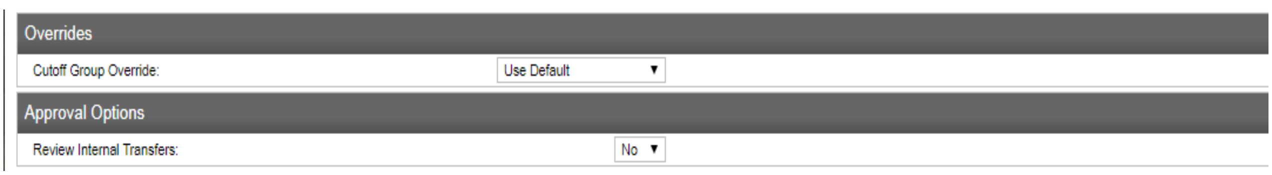


o. **Mobiliti Business** would be selected (check mark) to grant that employee access to the "GSB Business" mobile app.

p. **Role Name** will be the name of your business followed by the word employee. This will give the employee access to all the modules and authorities your business has signed up for. You will be able to restrict or grant access for each new user you create.

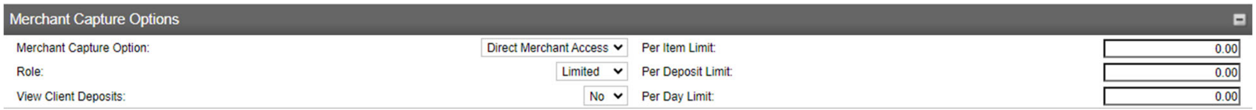


q. **Accounts** this section is where you give the employee access to view accounts. Select which ones you'd like them to have.



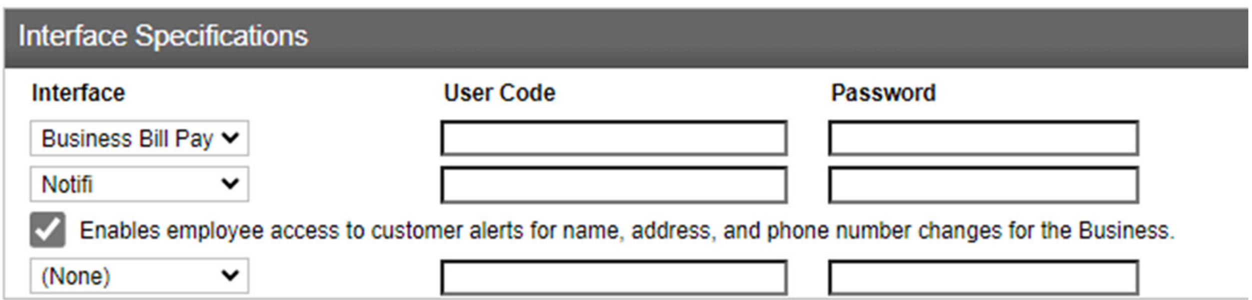
r. **Overrides** will automatically display Use Default and this should not be changed.
s. **Administration Options** will display if you've selected Administrator as the Security Level. These options should not be used.
t. **Approval Options** give you the ability to allow transfers between internal accounts to be submitted without review. The default selection is No. Just change the drop down to Yes and this employee will require approval by another user before the transfer will be submitted. If you've selected Administrator for the Security Level This employee will also have an Approve Transfer option. If you select Yes this employee will be able to approve transfers done by another employee but not their own.

u. **Fund Transfer Options** allows you to give this employee access to Inquire on transfers and Initiate transfers. Changing the drop down to Yes will grant access. Leave the boxes on No and this employee will not be able to complete any fund transfers.

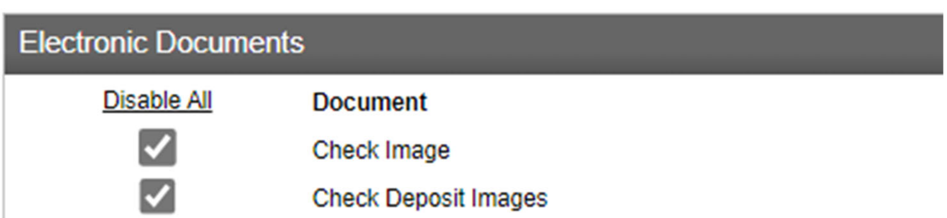


v. **Merchant Capture Options** is left as is and no changes should be made.
w. **Merchant Capture Location** is not a feature that you will need to fill out. Simply skip over this section.

x. **Stop Payment** allows you to give this employee access to inquire on or place a new stop payment. Changing the drop down to Yes will grant access.



y. **Interface Specifications** Notifi is the alerts system for transactions, balances, and security. The Notifi check box allows the user to edit contact information for the business. If you do not want the user to have this service simply remove it from the drop down. If you do not wish for this employee to enroll in Bill Pay you need to remove it from the drop down.

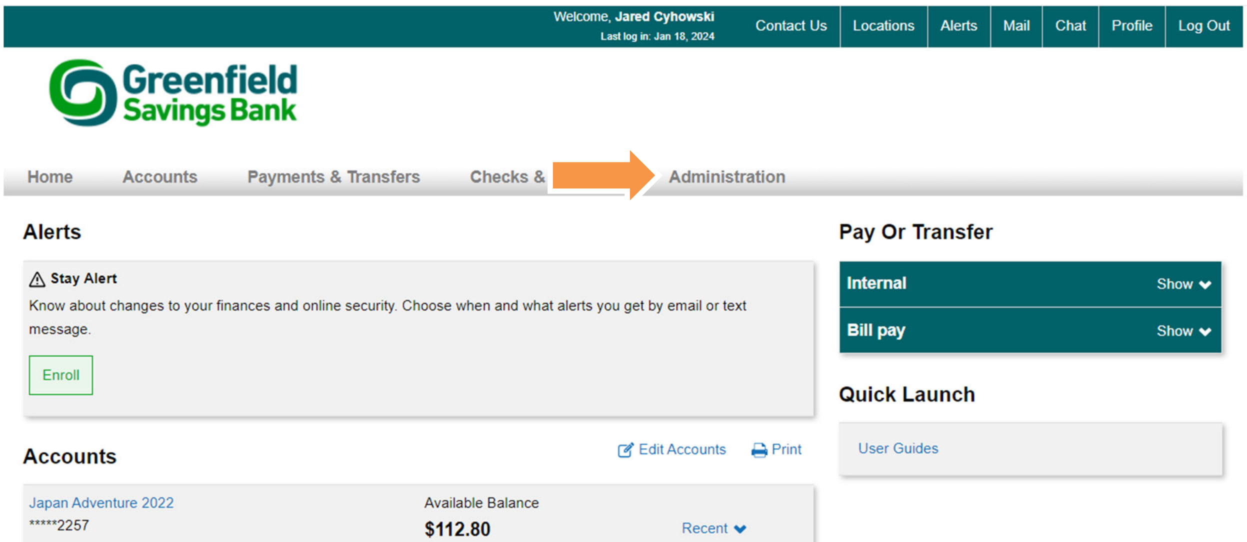


z. **Electronic Documents** should be checked off if you'd like this employee to see images of checks that clear or are deposited to the account.
aa. **Applications Enabled** will show an option for Wires. This is not a feature that will function even if selected. Leave the box unchecked.

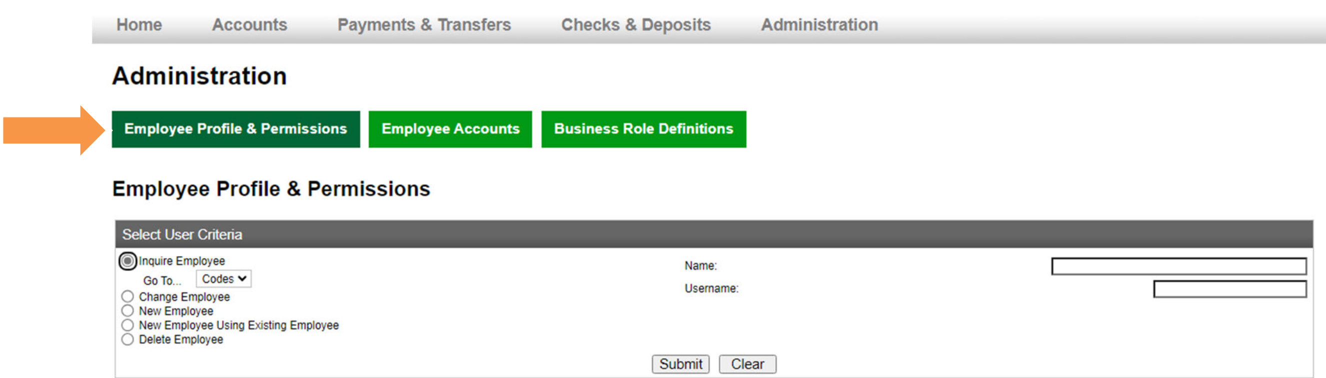
bb. Click on the Next button at the bottom and the accounts will validate, then click Finish. If you get the confirmation that it was successful you are all done and can create another employee if needed.

Deleting an Employee

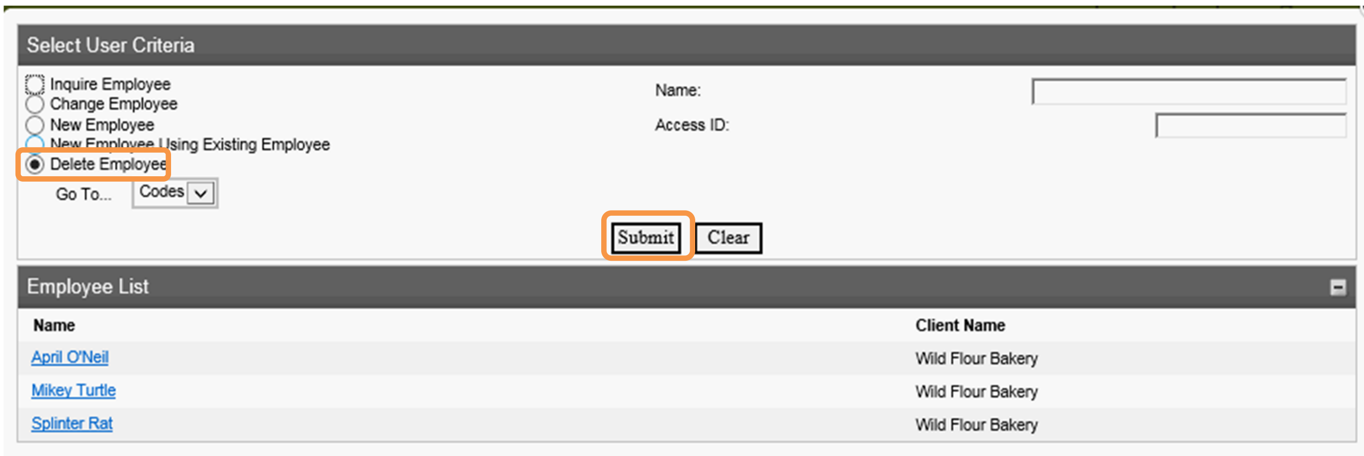
1. After you log in to Business Online, go to the Administration Tab.



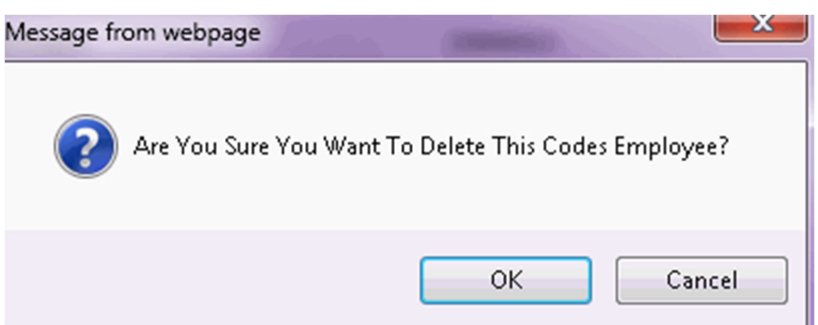
2. Select Employee Profile & Permissions



3. Click the Delete Employee button. If you have many employees you can search for a specific employee, otherwise click submit and a list will pop up. Click on the employee you need to delete.



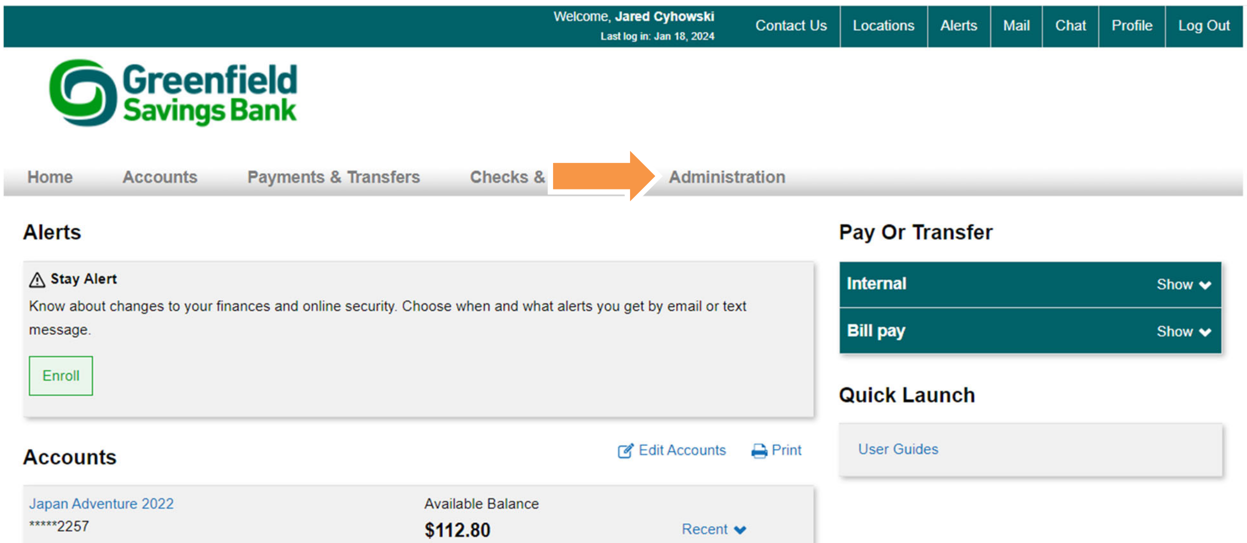
4. Click on the “X” in the upper left corner. A confirmation box will open. Click ok and the employee will be deleted.



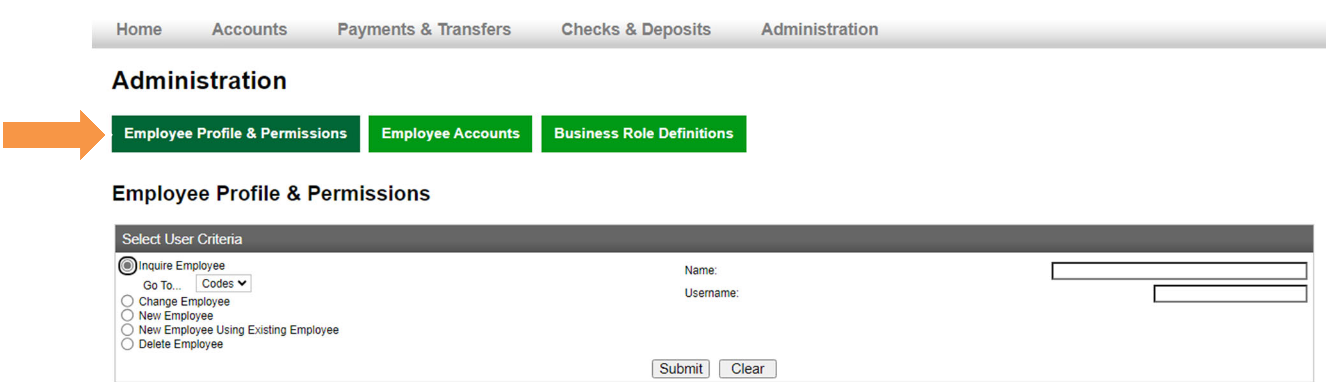
5. Click next and a confirmation window will pop up. Click ok and it will bring you back to the first screen you started on to delete the employee with a Success message on the top. You have now completely removed the employee from the system and they will no longer have any type of access.

Add or Remove Internal Transfers, Mobiliti, or Business Bill Pay

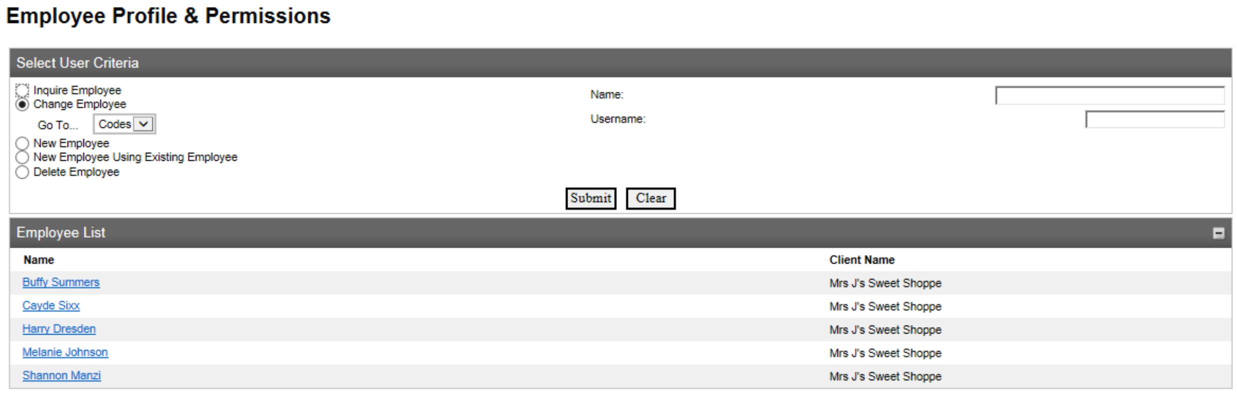
1. After you log in to Business Online, go to the Administration Tab.



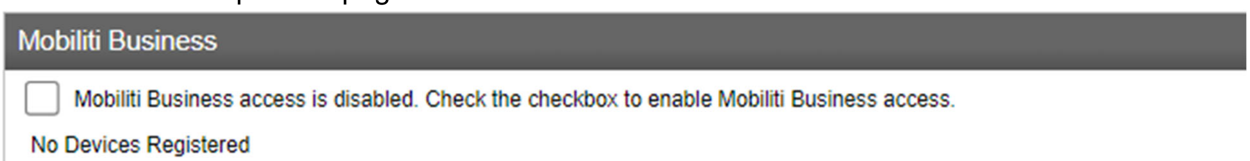
2. Select Employee Profile & Permissions



3. Select Change Employee and click Submit. A list of employees will come up. You can also search for a specific Username. Now select the employee you wish to modify.

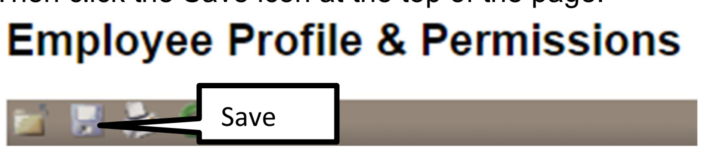


4. **Mobiliti:** Scroll down to the Mobiliti Business section and click the check box to grant access to the GSB Business app or uncheck the box to remove access. Then click the save icon at the top of the page.



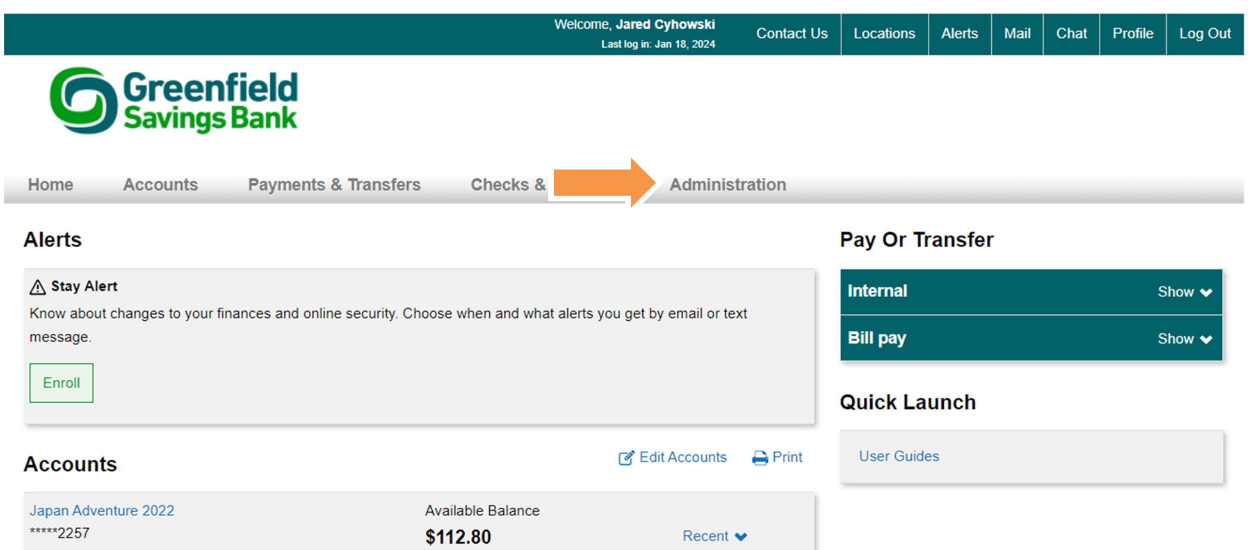
5. **Internal Transfers:** Scroll down to the sections that say **Approval Options** and **Fund Transfer Options**. Review Internal Transfers should be no, unless you want this employee to require approval for transfers. If your business requires dual approval for transfers and you would like this employee to be able to approve, change the Approve Transfers box to read **Yes**. Next change the Inquire Transfers**,** Initiate Transfers and Open Transfers to also read **Yes.** Now click the Save Icon and the changes will be saved.

6. To remove Transfer access follow the above steps and only change the drop downs to read **No** instead of yes, as pictured above. Then click the Save Icon for the changes to be saved.
7. **Business Bill Pay:** Scroll down to the Interface Specifications section. Business Bill Pay must be present under the Interface drop down categories for the employee user to have access. To remove access change the drop down from Business Bill Pay to (None). Then click the Save icon at the top of the page.

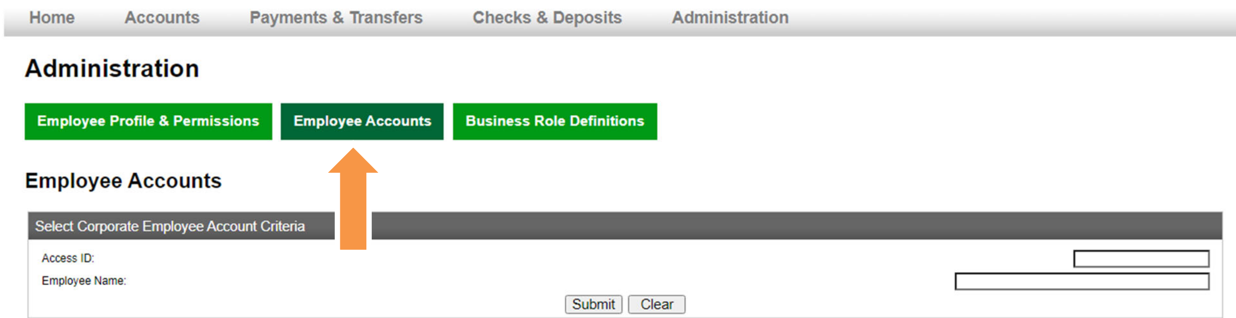


Add or Remove Employee Access to Accounts

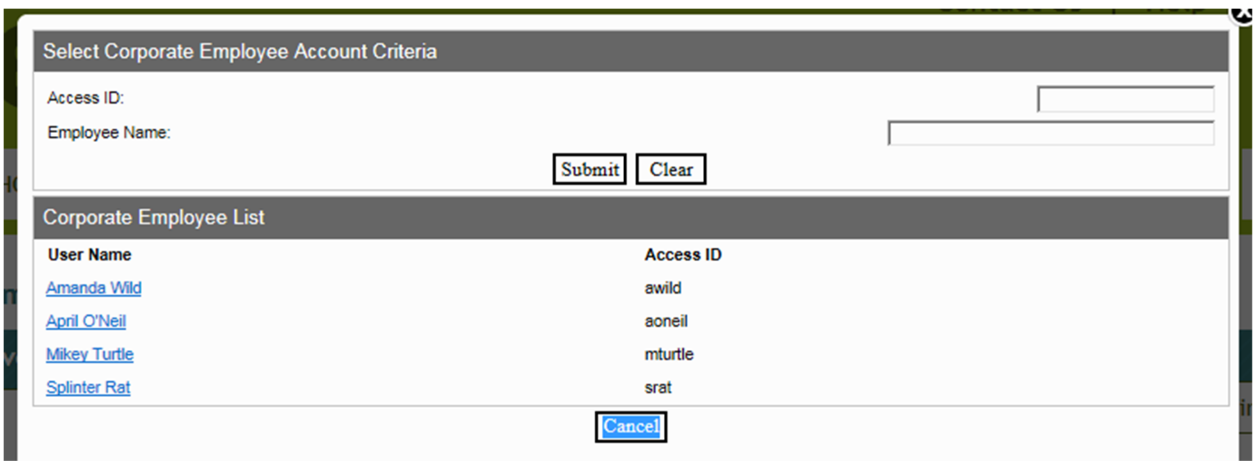
1. After you log in to Business Online, go to the Administration Tab.



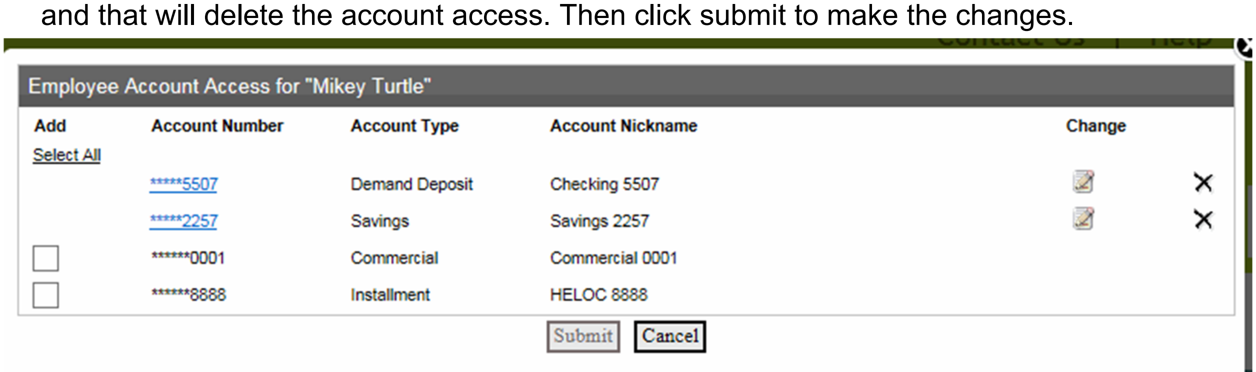
2. Select Employee Accounts



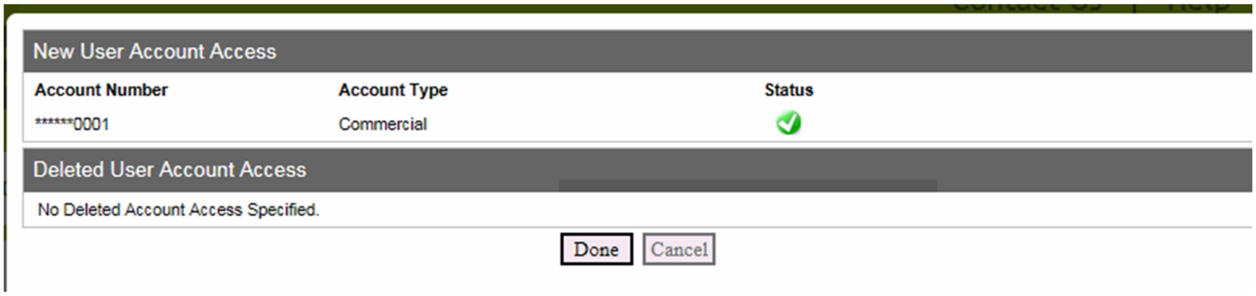
3. You have the ability to search for an employee by name or click on submit to pull up all employees. Then click on the employee you wish to change access for.



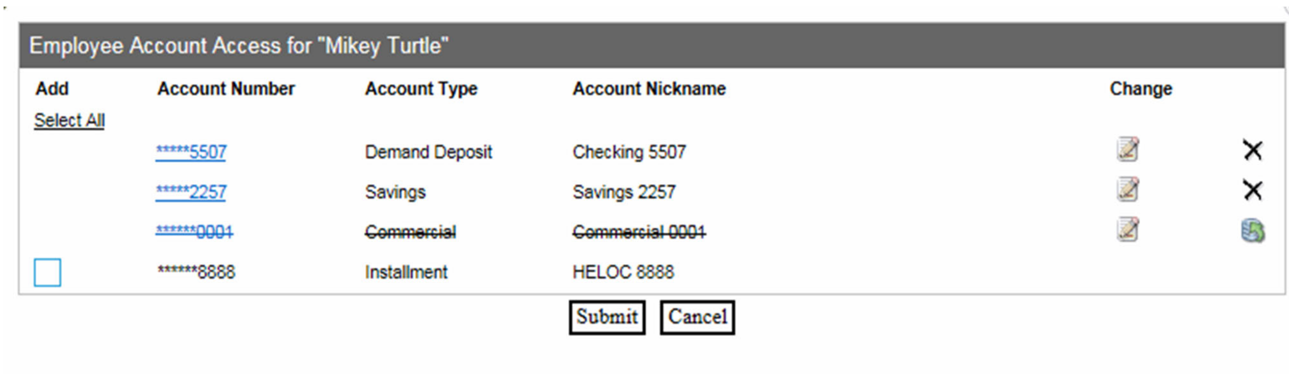
4. You will now see all the accounts the business has added to Business Online and what access the current employee has. Click on a box in the **Add** column and click submit. This will add access to that account. You can alternatively click on the **X** on the far right and that will delete the account access. Then click submit to make the changes.



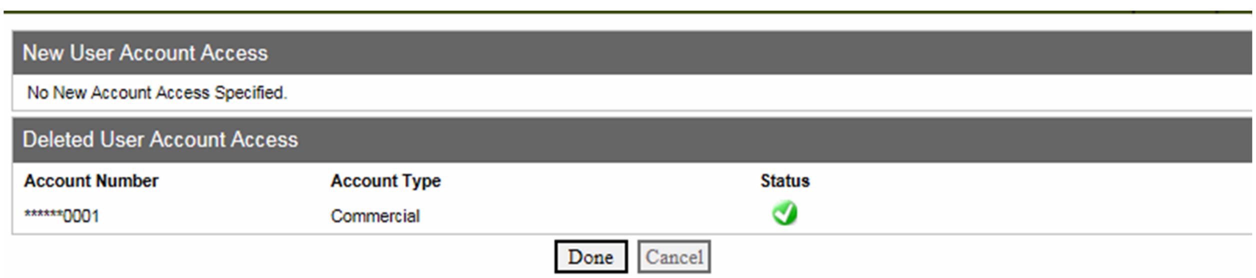
5. Adding confirmation will display and click done.



6. To delete an account Click the x to the right of the account. Click submit if the correct account is crossed off.

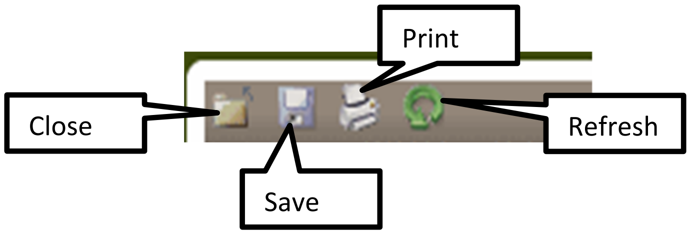


7. The Delete confirmation will display and click done.



Support

Always remember when editing an Employee under Profile and Permissions that you either use the Close Icon or Save Icon to navigate away from the current employee you are looking at. You also have the ability to Refresh which will remove any changes you haven't saved. You also have a Print Icon. This Tool Bar is always at the top of the pop up window.



Business Online offers a Help Tool at the top of every page you navigate to. It will bring up Help for the current page you are on. Once in the new window you can click on anything you may need help on. Business Online Help does have some differences as it was created to be a general help for any company using it.

Help may also refer to some services that you may not have the ability to use based on your access level or what your business chose to use. This Help Tool is not available in all of the Administration Windows, please contact Greenfield Savings Bank for help with Administration tools.

If you need assistance with setting up any of the Business Online features listed in this guide, please email businessonline@greenfieldsavings.com or call Greenfield Savings Bank at 413-775-8150. Support is available during normal business hours.