First Horizon BusinessConnect℠

User Administration

NEW 12.2021

USER-BASED PERMISSIONS

First Horizon's BusinessConnect℠ is a user-based system. As an Administrator, you add a user through the User Maintenance feature, adding basic user information, and then assigning needed permissions to the new user. These may include payment, reporting, risk management, administrative and alert functions. Existing users are also maintained in User Maintenance.

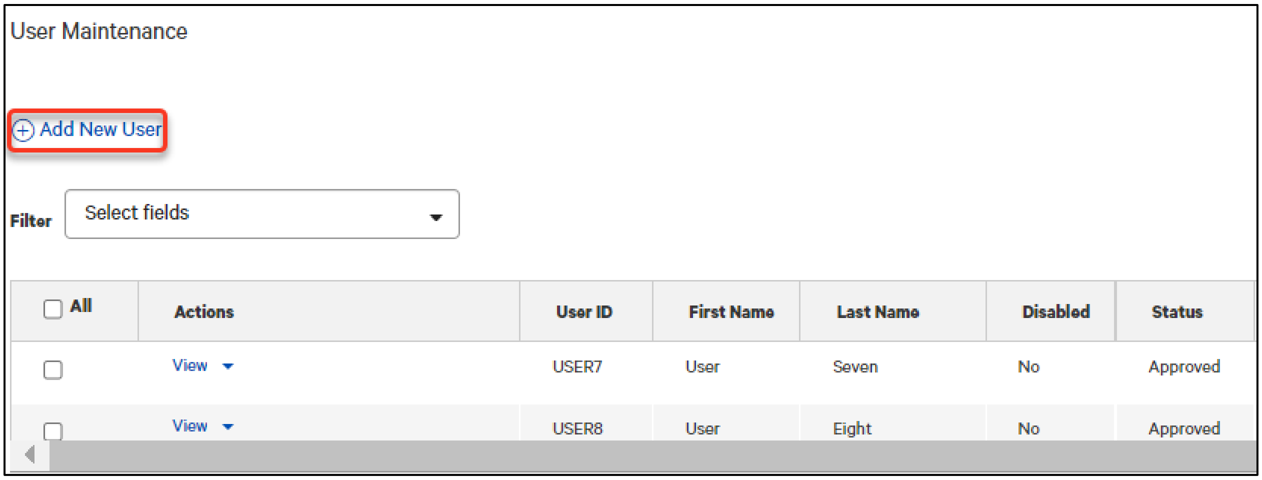
This guide includes the following topics:

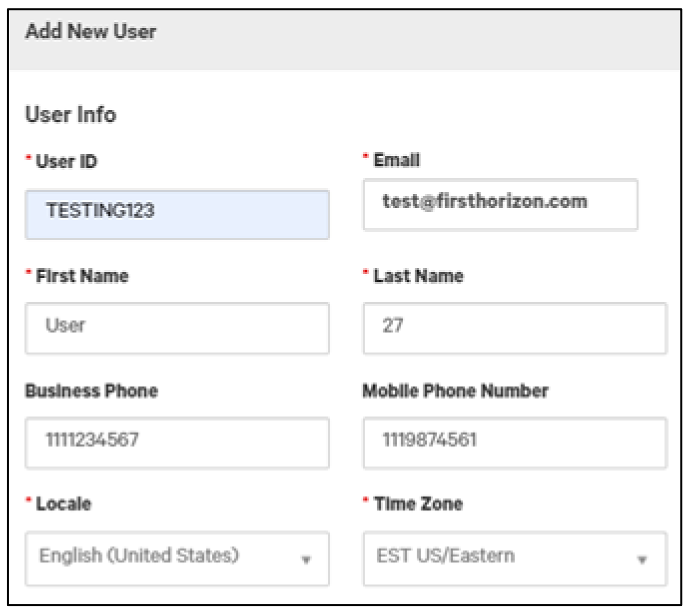
ADD A NEW USER

The **User Maintenance** widget allows you to set up a new user, give permissions, assign accounts, and more.

ADD NEW USER

1. In the **User Maintenance** widget, click **Add New User**.



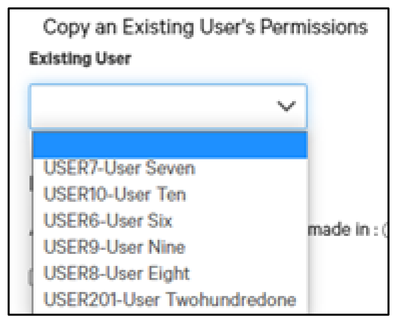


2. In the **User Info** section, enter a **User ID**.
   - Minimum of 1 character with maximum of 20 characters
   - No special characters allowed
3. In the **Email** field, enter the user's email address.
4. In the **First Name** field, enter the user's first name.
5. In the **Last Name** field, enter the user's last name.
6. *(Optional)* In the **Business Phone** field, enter a phone number.
7. *(Optional)* Enter a mobile number in the **Mobile Phone Number** field.
8. At **Locale**, *do not change* from English (United States).
9. Select a **Time Zone** for the user from the drop down list.

10. *(Optional)* If the company has been registered for mobile, the **Mobile User** checkbox is present.
    - Check the box if you want the user to be able to use the mobile app and then click the **Register Mobile Device** button.
11. Be sure to check this box if you want the user to have Mobile Remote Deposit Capture.
12. *(Optional)* Check the **Disable User** checkbox if you want this user to be in the system but inactive and therefore unable to log into the Client application. Mark this box if a user takes a leave of absence. Upon the user's return, uncheck the box.
13. The **Challenge Method** is automatically populated based on your company set up.

14. The **Copy an Existing User's Permissions** option lets you select a user from the company associated with the user you're creating and assign his or her permissions to the new user.

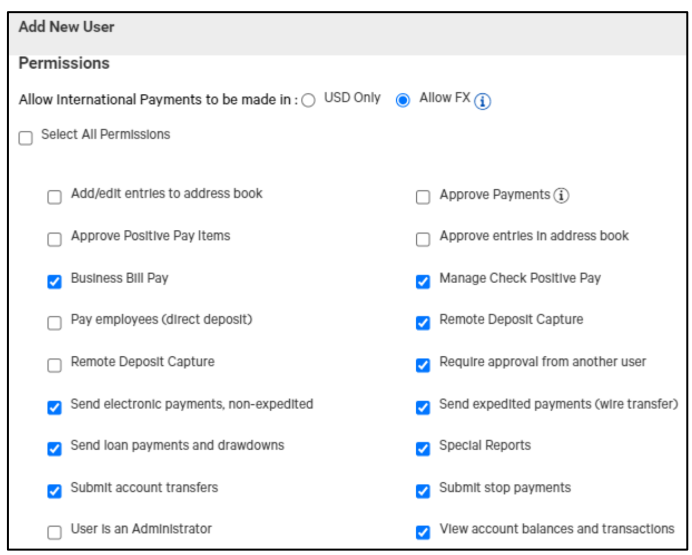
    You will still be able to modify any of these user permissions in later stages of the process. See [Copy User](#).



15. Under the **Permissions** heading, click **USD Only** to allow domestic wires. (FX is not allowed in BusinessConnect.)

16. Place a checkmark in the boxes by the **specific permissions desired** or click the **Select All Permissions** box.

    Keep in mind that you will only see permissions for products/services in which your company is using.

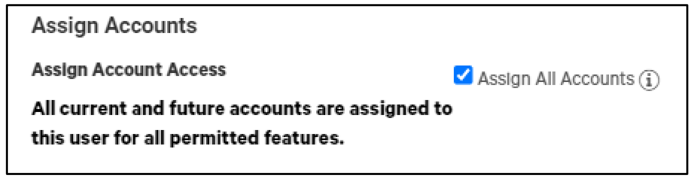


17. If you want the user to have to **select beneficiaries from the Contact Center** when establishing payments or templates, mark that checkbox under the **Beneficiaries** heading.

    Otherwise, leave blank.

18. The **Assign Accounts** section of the User Maintenance screen allows you to assign the bank accounts that the current user can work with.

    Either mark the **Assign All Accounts** box or click in the blank field and select the account(s) desired.

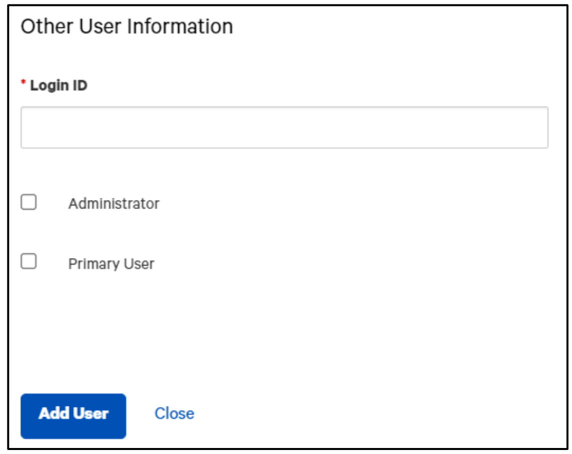


19. Under the **Limits** heading, the daily limit comes from your company settings. There are three types of limits: transaction, daily, or batch limits (for ACH payments).

    - A transaction limit indicates the maximum amount of a single transaction. This limit applies to both wire and ACH payments.
    - A daily approval limit is the maximum total value of all payments that can be approved on a given value date.

    Modify and/or add **Daily, Transaction** or **Batch** as needed for the user.

20. In the **Other User Information** section, **copy the User ID entered previously** in the User Info section.
    - This is the user's login ID or user ID for the system.
    - The Login ID must be between 6 and 60 characters, can only contain letters, numbers and certain symbols (@, +, _, - and .) and should not contain sensitive information.

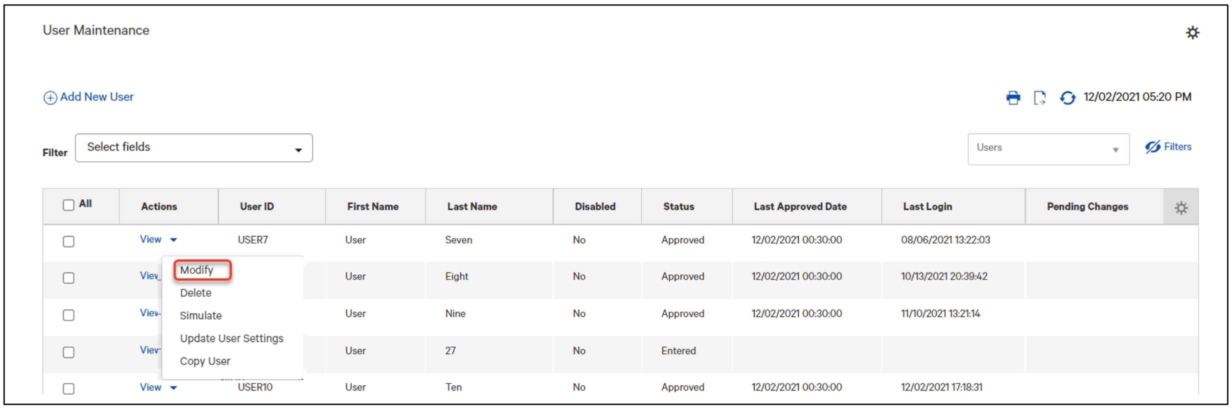


21. If this is the client's administrator, click in the box beside **Administrator**.
22. If this is not an administrator, click **Primary User**.
23. Click **Add User**.

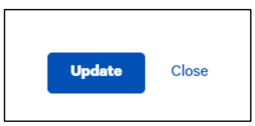
MODIFY EXISTING USER

An existing user may be modified by accessing the user record.

1. Navigate to the **User Maintenance widget**.
2. Click the **View** actions drop down.
3. Click **Modify**.



4. The same process opens when you edit an existing user as it does when adding a new user. Make modifications in **User Info, Permissions, Beneficiaries, Assign Accounts, and Limits**. See instructions on these steps earlier in this user guide.
5. When all changes are made, click the **Update** button at the bottom of the page.



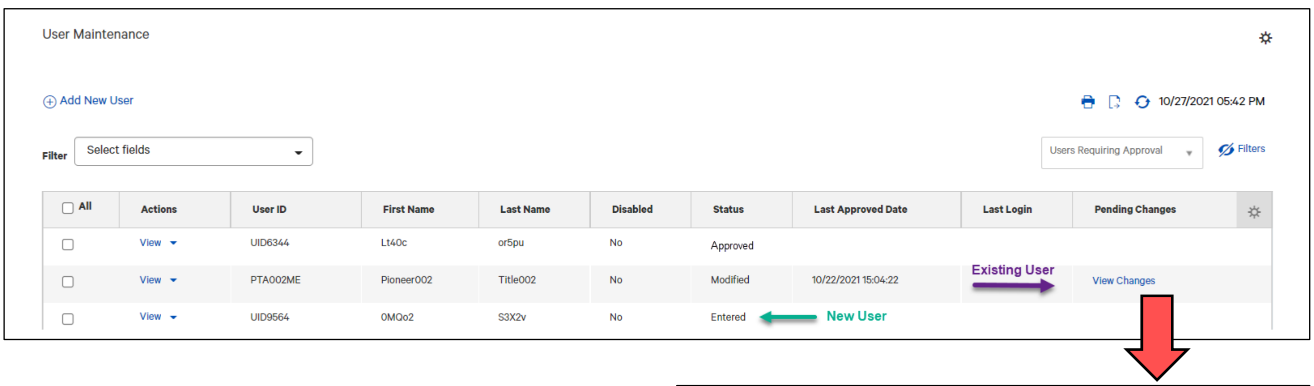
6. Follow the steps to approve the modification to an existing user, shown next in this user guide.

APPROVE NEW USER OR MODIFICATION TO EXISTING USER

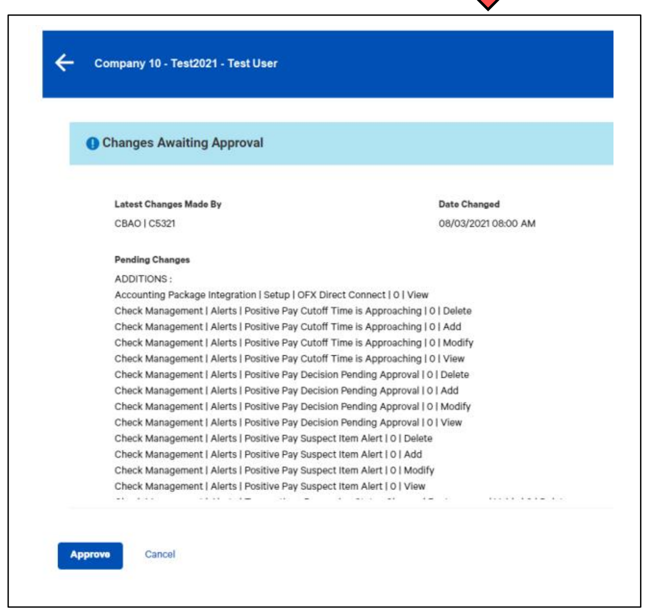
A new user record or a modified existing user record must be approved before it can be fully used by the individual. (The user can operate in a modified status but any changes which were made [e.g. adding a new service or deleting a service] will not be effective until the changes are approved.

APPROVE NEW USER OR CHANGES TO EXISTING USER:

1. Find the new or modified user in the **User Maintenance widget**.
2. If New User,
   - Click the **View** actions drop down to review the entire record.
   - Click **Approve**.
3. If Existing User,
   - Click the **View** action drop down to review the entire record.
   - Click **View Changes** in the far right to view just the changes to the record.
   - Click **Approve**.



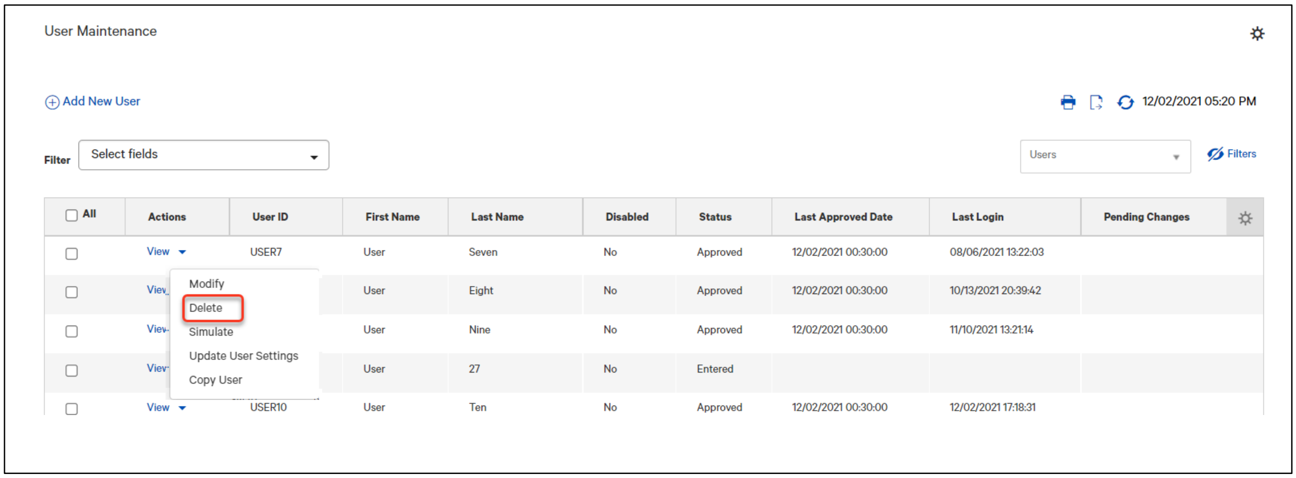
4. You will receive a message that the user is approved.



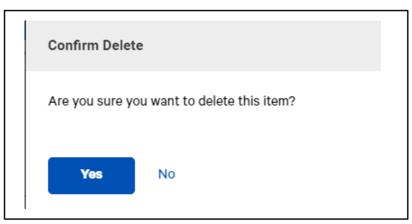
DELETE USER

You may remove an existing user due to leaving your company or taking a new position that does not require Treasury services. (If a user takes a leave of absence, you would not delete them but disable and then re-enable upon their return.)

1. Navigate to the **User Maintenance widget**.
2. Click the **View** actions drop down.
3. Click **Delete**.



4. Click **Yes** to confirm that you want to delete the user. Click No if necessary.



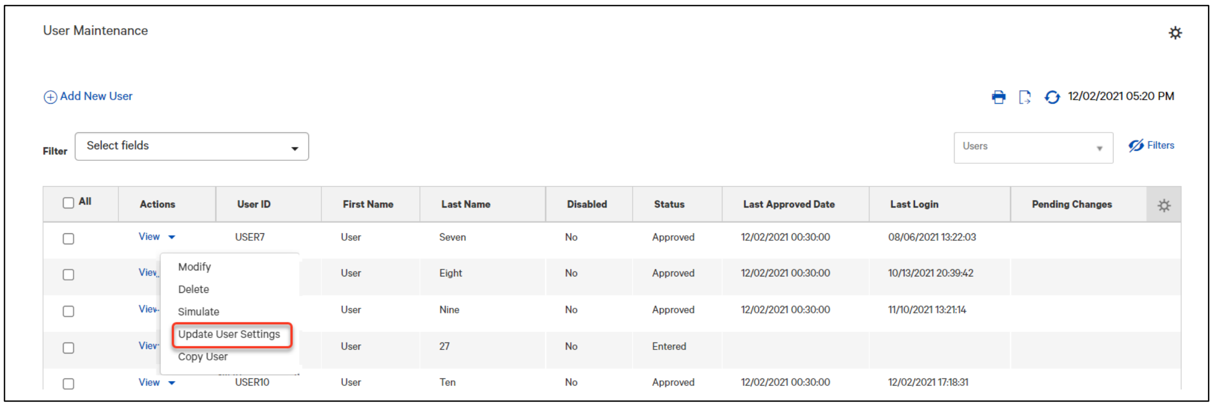
5. You will receive a message stating the user is deleted.

UPDATE USER SETTINGS

User Settings include adding/updating email and phone number plus resetting user passwords, unlocking users, viewing/resetting security questions.

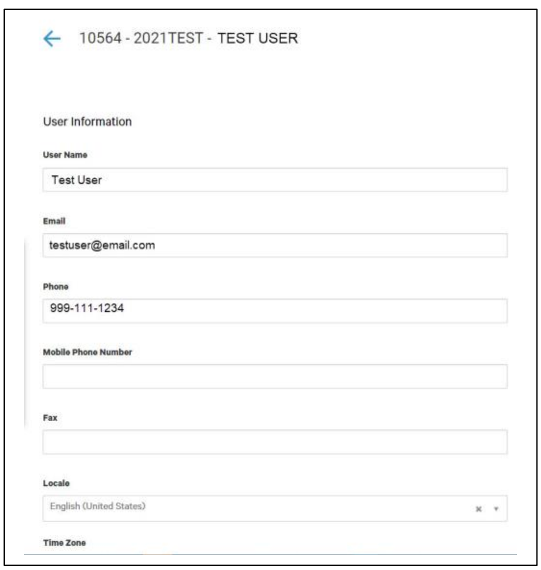
UPDATE USER SETTINGS

1. Navigate to the **User Maintenance widget**.
2. Click the **View** actions drop down.
3. Click **Update User Settings**.

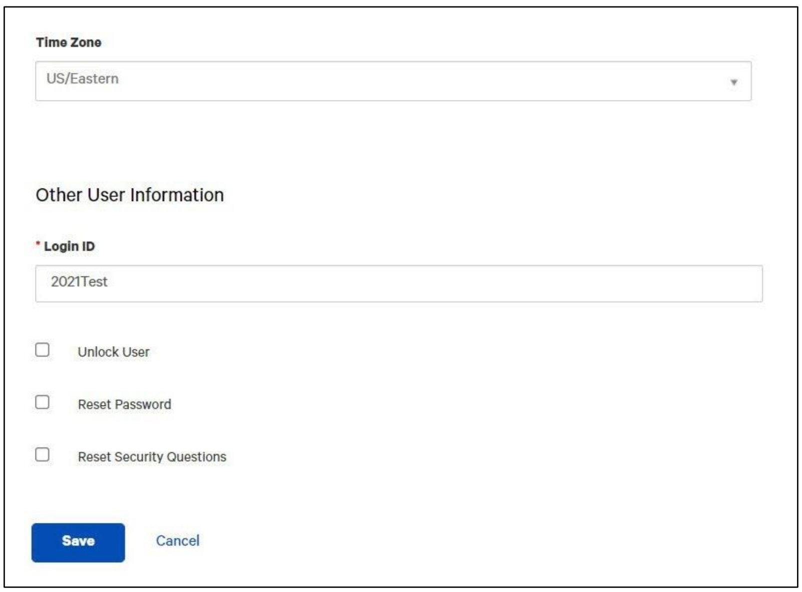


All	Actions	User ID	First Name	Last Name	Disabled	Status	Last Approved Date	Last Login	Pending Changes
	View	USER7	User	Seven	No	Approved	12/02/2021 00:30:00	08/06/2021 13:22:03	
	View		User	Eight	No	Approved	12/02/2021 00:30:00	10/13/2021 20:39:42	
	View		User	Nine	No	Approved	12/02/2021 00:30:00	11/10/2021 13:21:14	
	View		User	27	No	Entered			
	View	USER10	User	Ten	No	Approved	12/02/2021 00:30:00	12/02/2021 17:18:31	

4. Modify **email, phone, mobile phone,** and **fax**.



5. Under the **Other User Information** heading, you may complete the following actions.
    - View **Login ID**
    - Click the appropriate checkbox to perform an action.
        - **Unlock User** – Unlocks the user immediately. The user does not receive an email notification and may retry their password.
        - **Reset Password** – The user will receive an email with a temporary password. The user will use that password and then be asked to set up a new password after successfully using temporary one.
        - **Reset Security Questions** – Clears out the user's security questions. The next time the user logs in, they are prompted to set up new questions.
6. Click **Save**.

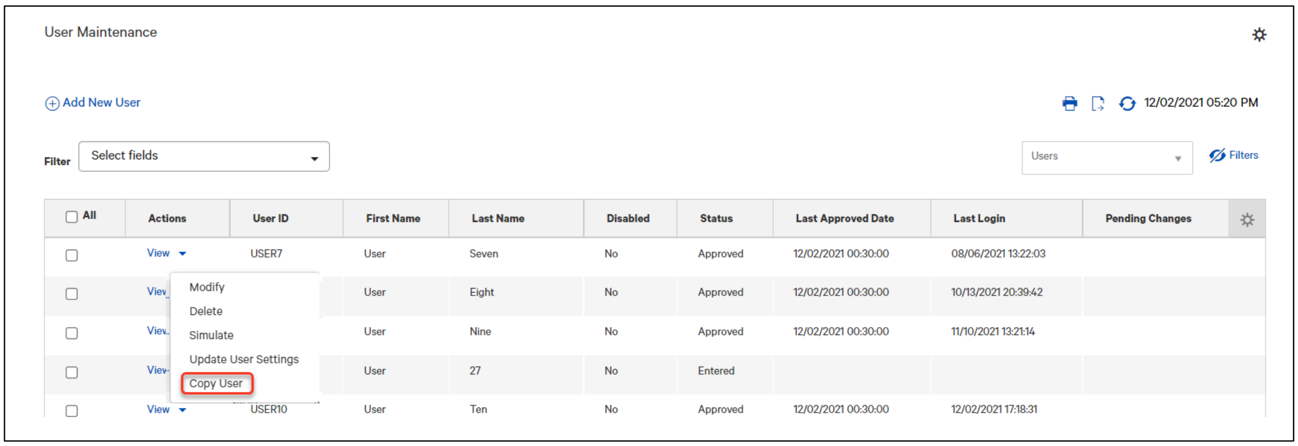


COPY USER

Copy an existing user to create a new user is accomplished by using the copy feature in the User Maintenance list View actions or 2) when you are adding a new user. You may use this functionality to easily copy an existing user's permissions, accounts, and/or approval limits.

COPY USER FROM USER MAINTENANCE LIST

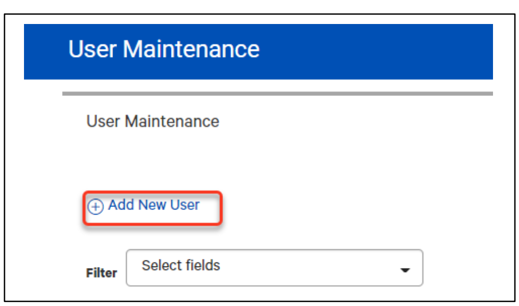
1. Navigate to the **User Maintenance widget**.
2. Click the **View** actions drop down on the user you want to copy.
3. Click **Copy User**.



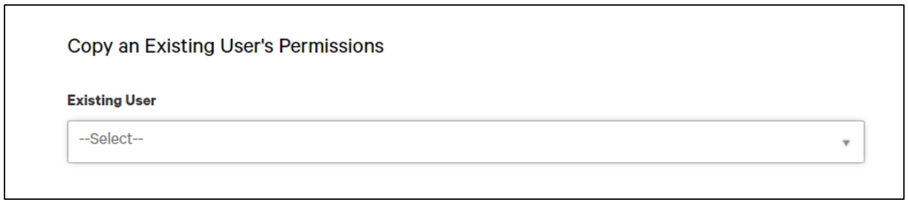
4. The Add User page opens.
5. Complete as you would a new user. The copied user's permissions, accounts, and/or approval limits are presented. You may either accept all or some.

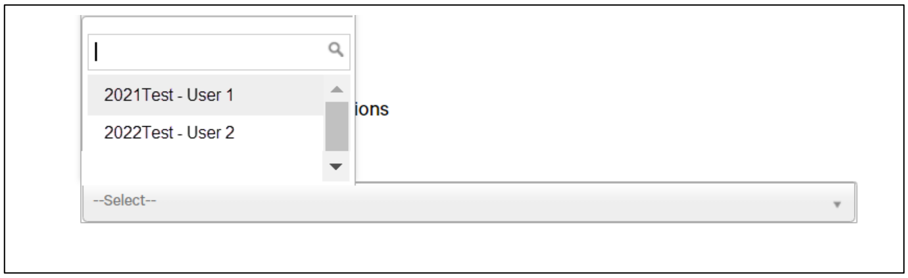
COPY USER DIRECTLY FROM ADD NEW USER

1. Navigate to the **User Maintenance widget**.
2. Click **Add New User**.



3. Follow the steps in the Add New User topic of this user guide.
4. In the **Copy an Existing User's Permissions**, select the user desired from the drop down list.





5. Continue entering the new user.
6. The copied user's permissions, accounts, and/or approval limits are presented. You may either accept all or some.