



First Horizon BusinessConnectSM

User Administration





USER-BASED PERMISSIONS

First Horizon's BusinessConnectSM 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 New User](#)

[Modify an Existing User](#)

[Approve User](#)

[Delete User](#)

[Update User Settings](#)

[Copy User](#)



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**.

The screenshot shows the 'User Maintenance' widget interface. At the top left, there is a button labeled '+ Add New User' which is highlighted with a red rectangular box. Below this button is a 'Filter' section with a dropdown menu currently set to 'Select fields'. Below the filter is a table with columns: 'All', 'Actions', 'User ID', 'First Name', 'Last Name', 'Disabled', and 'Status'. The table contains two rows of user data: one for 'USER7' and one for 'USER8', both with 'User' as the first name, 'Seven' and 'Eight' as last names, 'No' as disabled status, and 'Approved' as status.

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.

The screenshot shows the 'Add New User' form. The 'User Info' section contains the following fields:

- * User ID**: TESTING123
- * Email**: test@firsthorizon.com
- * First Name**: User
- * Last Name**: 27
- Business Phone**: 1111234567
- Mobile Phone Number**: 1119874561
- * Locale**: English (United States)
- * Time Zone**: EST US/Eastern



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.

☐ Mobile User

☐ Disable User

Challenge Method

RSA SecurID

☐ Opt-out of Trusteer Rapport

Opt-out Reason

Copy an Existing User's Permissions

Existing User

USER7-User Seven

USER10-User Ten

USER6-User Six

USER9-User Nine

USER8-User Eight

USER201-User Twohundredone

Add New User

Permissions

Allow International Payments to be made in : ☐ USD Only ☒ Allow FX ①

☐ Select All Permissions

<input type="checkbox"/> Add/edit entries to address book	<input type="checkbox"/> Approve Payments ①
<input type="checkbox"/> Approve Positive Pay Items	<input type="checkbox"/> Approve entries in address book
<input checked="" type="checkbox"/> Business Bill Pay	<input checked="" type="checkbox"/> Manage Check Positive Pay
<input type="checkbox"/> Pay employees (direct deposit)	<input checked="" type="checkbox"/> Remote Deposit Capture
<input type="checkbox"/> Remote Deposit Capture	<input checked="" type="checkbox"/> Require approval from another user
<input checked="" type="checkbox"/> Send electronic payments, non-expedited	<input checked="" type="checkbox"/> Send expedited payments (wire transfer)
<input checked="" type="checkbox"/> Send loan payments and drawdowns	<input checked="" type="checkbox"/> Special Reports
<input checked="" type="checkbox"/> Submit account transfers	<input checked="" type="checkbox"/> Submit stop payments
<input type="checkbox"/> User is an Administrator	<input checked="" type="checkbox"/> View account balances and transactions



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.

Beneficiaries

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

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.

Assign Accounts

Assign Account Access ☒ Assign All Accounts ⓘ

All current and future accounts are assigned to this user for all permitted features.

Assign Accounts

Assign Account Access ☐ Assign All Accounts ⓘ

123456789 - Checking One ✕

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.

Limits

Daily	Transaction	Batch
500000		



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**.

Other User Information

* Login ID

☐ Administrator
☐ Primary User

Add User [Close](#)



MODIFY EXISTING USER

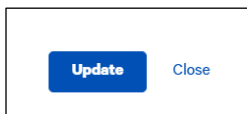
An existing user may be modified by accessing the user record.

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

The screenshot shows the 'User Maintenance' interface. At the top, there's a header with 'User Maintenance' and a settings icon. Below the header, there's a '+ Add New User' button and a date/time stamp '12/02/2021 05:20 PM'. A 'Filter' dropdown is set to 'Select fields'. Below this is a table with columns: 'All', 'Actions', 'User ID', 'First Name', 'Last Name', 'Disabled', 'Status', 'Last Approved Date', 'Last Login', and 'Pending Changes'. The table contains five rows of user data. The second row's 'View' dropdown is open, showing options: 'View', 'Modify' (highlighted with a red box), 'Delete', 'Simulate', 'Update User Settings', and 'Copy User'.

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

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**.

User Maintenance

[Add New User](#)

Filter:

Users Requiring Approval [Filters](#)

<input type="checkbox"/> All	Actions	User ID	First Name	Last Name	Disabled	Status	Last Approved Date	Last Login	Pending Changes
<input type="checkbox"/>	View	UID6344	Lt40c	or5pu	No	Approved			
<input type="checkbox"/>	View	PTA002ME	Pioneer002	Title002	No	Modified	10/22/2021 15:04:22		View Changes
<input type="checkbox"/>	View	UID9564	OMQo2	S3X2v	No	Entered			

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

← Company 10 - Test2021 - Test User

Changes Awaiting Approval

Latest Changes Made By: CBAD | C5321 | Date Changed: 08/03/2021 08:00 AM

Pending Changes

ADDITIONS :

Accounting Package Integration | Setup | OFX Direct Connect | 0 | View

Check Management | Alerts | Positive Pay Cutoff Time is Approaching | 0 | Delete

Check Management | Alerts | Positive Pay Cutoff Time is Approaching | 0 | Add

Check Management | Alerts | Positive Pay Cutoff Time is Approaching | 0 | Modify

Check Management | Alerts | Positive Pay Cutoff Time is Approaching | 0 | View

Check Management | Alerts | Positive Pay Decision Pending Approval | 0 | Delete

Check Management | Alerts | Positive Pay Decision Pending Approval | 0 | Add

Check Management | Alerts | Positive Pay Decision Pending Approval | 0 | Modify

Check Management | Alerts | Positive Pay Decision Pending Approval | 0 | View

Check Management | Alerts | Positive Pay Suspect Item Alert | 0 | Delete

Check Management | Alerts | Positive Pay Suspect Item Alert | 0 | Add

Check Management | Alerts | Positive Pay Suspect Item Alert | 0 | Modify

Check Management | Alerts | Positive Pay Suspect Item Alert | 0 | View

[Approve](#) [Cancel](#)



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**.

User Maintenance

+ Add New User

Filter: Select fields

Users Filters

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

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

Confirm Delete

Are you sure you want to delete this item?

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**.

User Maintenance

[Add New User](#)

Filter:

Users

<input type="checkbox"/> All	Actions	User ID	First Name	Last Name	Disabled	Status	Last Approved Date	Last Login	Pending Changes
<input type="checkbox"/>	View	USER7	User	Seven	No	Approved	12/02/2021 00:30:00	08/06/2021 13:22:03	
<input type="checkbox"/>	View		User	Eight	No	Approved	12/02/2021 00:30:00	10/13/2021 20:39:42	
<input type="checkbox"/>	View		User	Nine	No	Approved	12/02/2021 00:30:00	11/10/2021 13:21:14	
<input type="checkbox"/>	View		User	27	No	Entered			
<input type="checkbox"/>	View	USER10	User	Ten	No	Approved	12/02/2021 00:30:00	12/02/2021 17:38:31	

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

← 10564 - 2021TEST - TEST USER

User Information

User Name

Email

Phone

Mobile Phone Number

Fax

Locale

Time Zone



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**.

Time Zone

US/Eastern

Other User Information

* Login ID

2021Test

☐ Unlock User

☐ Reset Password

☐ Reset Security Questions

Save

Cancel



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**.

The screenshot shows the 'User Maintenance' widget interface. At the top, there is a header with 'User Maintenance' and a settings icon. Below the header, there is a '+ Add New User' button and a 'Filter' dropdown set to 'Select fields'. A table of users is displayed with columns: All, Actions, User ID, First Name, Last Name, Disabled, Status, Last Approved Date, Last Login, and Pending Changes. The table contains five rows of user data. The 'View' dropdown for the user 'User 27' is open, showing options: Modify, Delete, Simulate, Update User Settings, and Copy User. The 'Copy User' option is highlighted with a red box.

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

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**.

The screenshot shows the 'User Maintenance' widget interface. At the top, there is a blue header with 'User Maintenance'. Below the header, there is a 'User Maintenance' label and a '+ Add New User' button. The '+ Add New User' button is highlighted with a red box. Below the button, there is a 'Filter' dropdown set to 'Select fields'.



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.

Copy an Existing User's Permissions

Existing User

--Select--

2021Test - User 1

2022Test - User 2

--Select--

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.