



# First Horizon BusinessConnect<sup>SM</sup>

Admin Preferences





## PREFERENCES

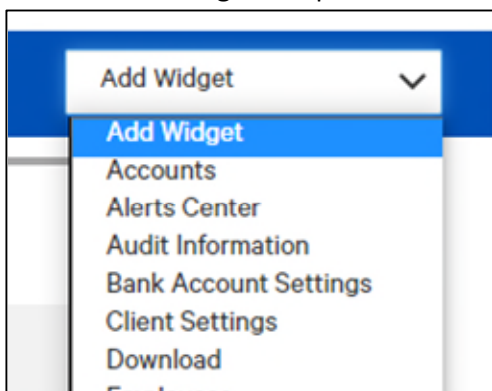
If entitled, you may set preferences for the functions below:

- Client Settings.
- Bank Account Settings.

## CLIENT SETTINGS

To view and modify Client Settings:

1. Click the **Add Widgets** drop down list to add the **Client Settings** widget to your Home page.



2. Go to the **Client Settings** widget.
3. Select **View** from the **Actions** drop-down list.





### To modify Client Settings:

1. Select **Client Settings** from the Setup menu.
2. Select **Modify** from the **Actions** drop-down list. (Or you may modify once you click **View** from the **Actions** drop down list.)
3. Change the contact information in the fields as applicable.
  - If your company has Beneficiary Notifications enabled, you will see an additional section, **Company Primary Contact Information for Beneficiary Notification**.  
The information entered here will be used for the beneficiary notification email sent when a payment is confirmed. Enter the contact name, email address, and phone number.
  - If you want the group or company to have a default currency for payments, check the Set **Default Payment Currency** check box.
  - Check the **Allow modification** check boxes if you want the group or company to be allowed to modify the specified payment type following submission of the payment.
4. Click **Save**.

← Client Settings

Client Settings

Payment Settings

Set Default Payment Currency  
Yes

Allow modification post-submit of Freeform Payments  
Yes

Allow modification post-submit of Payments from Templates or Repetitive  
Yes

Allow modification post-submit of Imported Payments  
Yes

Modify Cancel

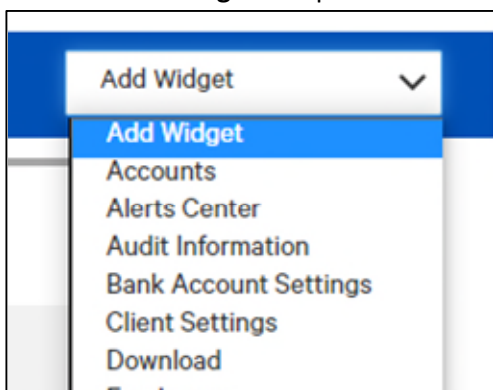


## BANK ACCOUNT SETTINGS

The **Bank Account Settings** widget provides a list of company bank accounts. From here, you can view details of each account as well as print or export the list. The widget also gives you the opportunity to change an existing account name and add a billing account number, if desired.

### To change the name on an account:

1. Click the **Add Widgets** drop down list to add the **Bank Account Settings** widget to your Home page.



2. Scroll to the **Bank Account Settings** widget and select the account you want to change.
3. Click **Modify**.

The system displays the account selected.


<input type="checkbox"/> All	Actions	Bank Code	Account Number	Client Account Name	Account Name
<input type="checkbox"/>	Modify	170	30010:	ACBS Loan	ACBS Loan
<input type="checkbox"/>	Modify	70	CDAR1	CDARS Test Acct8	CDARS Test Acct8
<input type="checkbox"/>	Modify	170	CDAR1	CDARS Test Acct9	CDARS Test Acct9
<input type="checkbox"/>	Modify	170	CDAR1	CDARS Test Acct10	CDARS Test Acct10

4. Change the name in the **Client Account Name** field.  
If needed, use the **Billing Account Number** drop-down to select a billing account. The billing account is the account that will be billed for services rendered on this account.
5. Click **Save**.



## NOTE

Bank-defined field columns may appear in your version of the **Bank Account Settings** widget. These fields are view-only and cannot be modified.

 Bank Account Settings

Bank Account Settings

**Bank Code**  
170

**Account Number**  
3001

**Account Name**  
ACBS

**\* Client Account Name**  
ACBS Loan

**Billing Account Number**  
--Select--

Save

Cancel