

# Business Advantage Administration User Guide





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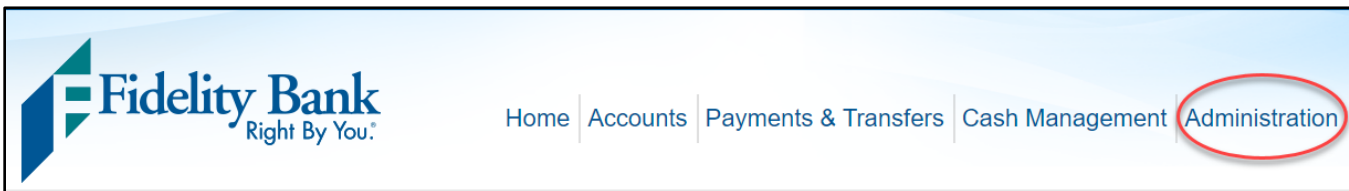
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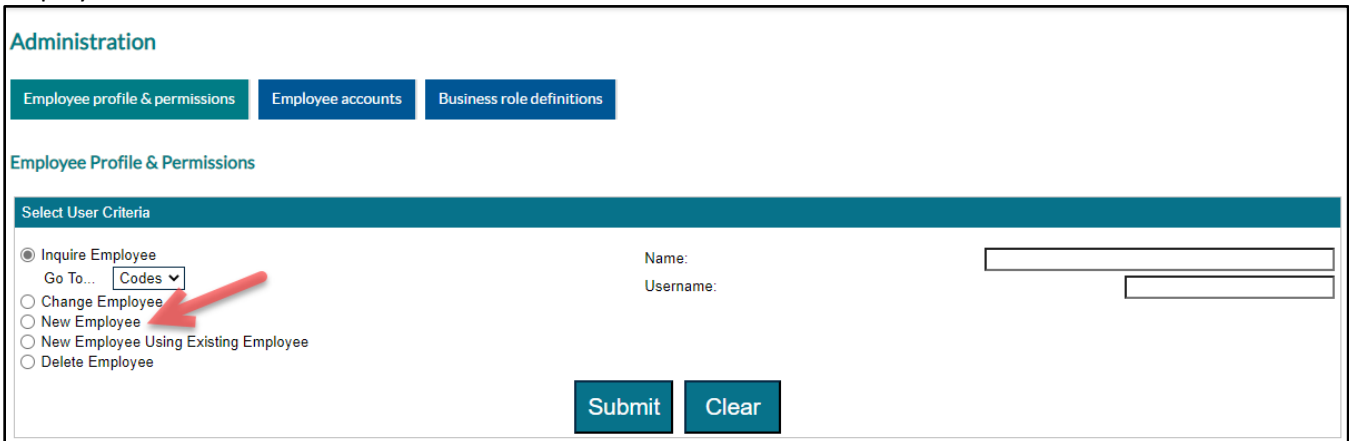
## Create a New User

### Steps to Create a New User

Click on **Administration**.



### Employee Profile & Permissions



Select **New Employee** and click **Submit**.

If you are setting up a user that will have similar access to an existing user, select **New Employee Using Existing Employee**. This option will prefill specific fields based on the existing employee profile. A list of users will display to copy. Select an existing user by clicking on their name.



Complete the following fields for the new user:

**Name:** Enter the user's First and Last name

**Security Level:** If the business is enrolled in Bill Pay, determine what permission this user should have regarding Bill Pay.

- Employee – requires the user to obtain dual approval
- Supervisor – no approval required
- Administrator – no approval required

**Email Address:** Enter the user's email address.

**Username:** Enter a unique username for this new user. Usernames need to be all lowercase.

**Token Status:** This is only required if the user will originate ACH and/or Wires. If needed, select **Pending Enablement**.

**Token Type:** If status is Pending Enablement, a Token Type will need to be selected.

- **Go3** – key fob token. If selecting this token type, please contact Business Solutions to have the token shipped to your local branch.
- **Soft Token** – smart phone application that is available on up-to-date Android and iPhone software.

**Mobiliti Business** – check the box to allow the user to download and access the account(s) on the Fidelity Bank Business App.



Role Assignment

\* Role Name

Inquiry Sub User

Add Role

**Role Name:** Role Assignments defines what access and permissions the user will have on the assigned accounts with their login credentials. Click on the dropdown box to select a role, click **Add Role**. Repeat this step for each applicable role.

- All users, excluding Senior Administrator, should have Inquiry Sub User as a Role Name. Inquiry Sub User allows basic view only access.
- If the business utilizes ACH and/or Wire, the other Role Name options are BA ACH Submitter, BA ACH Approver, BA Wire Submitter, BA Wire Approver.
  - Submitter Role can create ACH and/or Wires.
  - Approver Role can approve ACH and/or Wires.
  - If a user has both Submitter and Approver roles, they will be able to process an ACH and/or Wire without additional approval.
    - If this user will need an Approver, please contact Business Solutions to assist with the setup of dual control.

ACH

Employee is not enabled for ACH Manager access. Check the checkbox to grant ACH Manager access.

**ACH Manager Access:** Check the box if the user has ACH Submitter and/or ACH Approver roles

Accounts

To grant account access for this Employee check the checkbox associated with the account. To remove account access, uncheck the checkbox.

Access	Account Number	Account Nickname	ACH Permission
<a href="#">Select All</a>			
<input type="checkbox"/>	XXXX3263	Smart Account	
<input type="checkbox"/>	XXXX9111	1	
<input type="checkbox"/>	XXXX9222	2	
<input type="checkbox"/>	XXXX9333	3	
<input type="checkbox"/>	XXXX9555	4	
<input type="checkbox"/>	XXXX9789	5	

**Accounts:** Check the checkbox next to the accounts the user will need to access.

**ACH Permission:** ACH Permission dropdown box will display if ACH is enabled above in the ACH Manager Access section. ACH origination is only available for accounts with a signed ACH agreement.

- Select the level of access needed, typically Full Access if granted.

# Business Advantage Administration

## User Guide



Certificate Of Deposit			
Access	Account Number	Account Nickname	ACH Permission
<a href="#">Select All</a>			
<input type="checkbox"/>	XXXXXX1328	CD	
Loans			
Access	Account Number	Account Nickname	ACH Permission
<a href="#">Select All</a>			
<input type="checkbox"/>	111	CONS Unsecured	
<input type="checkbox"/>	170	USDA Fixed	
<input type="checkbox"/>	171	VA Fixed	
<input type="checkbox"/>	172	FHA Fixed	
<input type="checkbox"/>	173	Portfolio Fixed	
<input type="checkbox"/>	174	Portfolio ARM	
<input type="checkbox"/>	175	Conv Fixed	
<input type="checkbox"/>	XXX1226	CUSTOMER LOAN 1226	
<input type="checkbox"/>	XXX1228	CUSTOMER LOAN 1228	
Credit Card			
Access	Account Number	Account Nickname	ACH Permission
<a href="#">Select All</a>			
<input type="checkbox"/>	XXXXXXXX1036	Laura's TFB card	
Relationship Credit Card			
Access	Account Number	Account Nickname	ACH Permission
<a href="#">Select All</a>			
<input type="checkbox"/>	XXXXXXXX7924	Relationship - Laura's card	

For any **CDs**, **Loans**, and/or **Credit Cards** available in Business Advantage, select the accounts the new user will need to access.

Overrides	
Cutoff Group Override:	<input type="text" value="Use Default"/>
Approval Options	
Review Internal Transfers:	<input type="text" value="No"/>
Fund Transfer Options	
Inquire Transfers:	<input type="text" value="No"/>
Initiate Transfers:	<input type="text" value="No"/>
Open Transfers:	<input type="text" value="Yes"/>

**Overrides:** Do not change. Leave as Use Default.

**Review Internal Transfers:** Do not change: Leave as No.

**Funds Transfer Options:** Select **Yes** or **No** to allow the user to **Inquire**, **Initiate** or **Open** (view details) a transfer.

Stop Payments	
Inquiry:	<input type="text" value="No"/>
New:	<input type="text" value="No"/>

**Inquiry:** Select Yes if the user will need to inquire about a stop payment.

**New:** Select Yes if the user will need to place a stop payment.



**Interface Specifications** are additional services available to businesses in Business Advantage. The services displayed are the additional services that are currently being used by the business. If the new user needs access to these services, please contact Business Solutions (1-855-547-1385 ext. 3).

- For example: Bill Pay, ACH Alert LLC (*Positive Pay and ACH Filter*), Notifi (*Alerts*).

**Electronic Documents** – the applicable documents needed for the new user will display. Select all the documents in the left column.

**Applications Enabled** – if the user will need to originate wires, check the box next to Wires. Please note, the wire option requires the BA Wire Submitter and/or BA Wire Approver role in the Role Assignment section above.

Click **Next**.

Click **Send Emails** to send the new user their username and a temporary password.  
Click **Next** after you click Send Emails.

# Business Advantage Administration

## User Guide



Employee Profile & Permissions

New Employee      2 - Send Emails      3 - Account Update      4 - Wires

Access Added

Checking

Business Online	Account Number	Account Nickname
<input checked="" type="checkbox"/>	XXXX3263	Smart Account

Next

Verify each account has a green checkmark. Once all accounts are marked appropriately, click **Next**.

Employee Profile & Permissions

New Employee      3 - Account Access      4 - Wires

Wire User

Client

Client Name	Client ID
<input checked="" type="checkbox"/> ABC Company	204823148

Account Selection

Account Number	Account Type	Routing Number	Nickname	Permission
XXXX3263	Demand Deposit	053103585	Smart Account	No Access

Finish      Cancel

Fidelity Bank, PO Box 8, Fuquay Varina, NC 27526  
1-855-547-1385

[Privacy Statement](#)

**Wires**- if the user will have wire capabilities, select the Wire Permission for each applicable account from the dropdown box.

- Do not turn on Wire access to an account unless a signed a wire agreement is on file with the bank. If you are not sure, please contact Business Solutions prior to granting access (1-855-547-1385 ext. 3).

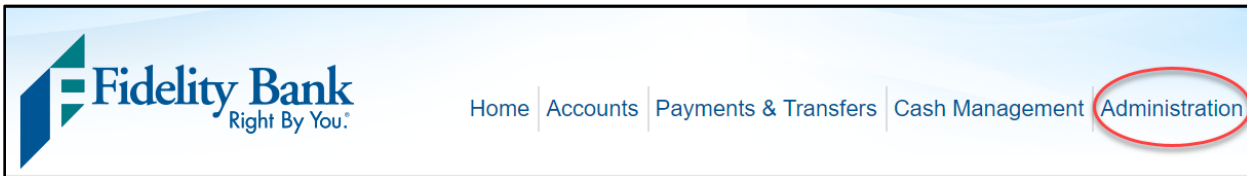
Click **Finish**





### Add or Update Account Access for Users

Click **Administration**.



Select **Change Employee** and click **Submit**.

The screenshot shows the 'Administration' page. The 'Employee Profile & Permissions' section is active. Under 'Select User Criteria', the 'Change Employee' radio button is selected, indicated by a red arrow. The 'Go To...' dropdown menu is set to 'Codes'. There are input fields for 'Name:' and 'Username:'. The 'Submit' and 'Clear' buttons are at the bottom.

Name	Client Name
Admin User	ABC Company
Business Admin User	ABC Company
Admin User	ABC Company
Admin User	ABC Company
Admin User	ABC Company
Admin User	ABC Company
Testin_user	ABC Company
Admin User	ABC Company

Click on the employee's name.



Mobility Business	+
Role Assignment	+
ACH	+
Accounts	+
Overrides	+
Approval Options	+
Fund Transfer Options	+
Merchant Capture Options	+
Stop Payments	+
Interface Specifications	+
Electronic Documents	+

Scroll down to **Accounts** and click the + sign on the right side.

Accounts		
To grant account access for Testin user check the checkbox associated with the account. To remove account access, uncheck the checkbox.		
Checking		
Access	Account Number	Account Nickname
Select All		
<input checked="" type="checkbox"/>	<a href="#">XXXX3263</a>	Smart Account
<input checked="" type="checkbox"/>	<a href="#">XXXX9111</a>	1
<input checked="" type="checkbox"/>	<a href="#">XXXX9222</a>	2
<input type="checkbox"/>	XXXX9333	3
<input type="checkbox"/>	XXXX9555	4

Check boxes to grant access to user or Uncheck boxes to remove access to user.

Once the applicable accounts are selected, **Save** by clicking the Save Icon located at the top of the screen.

### Administration

Employee profile & permissions   Employee accounts   Business role definitions

#### Employee Profile & Permissions

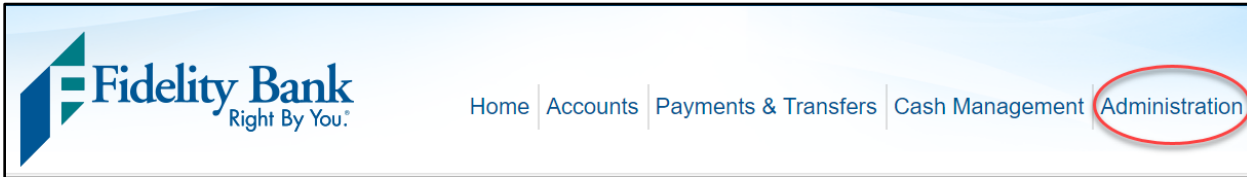
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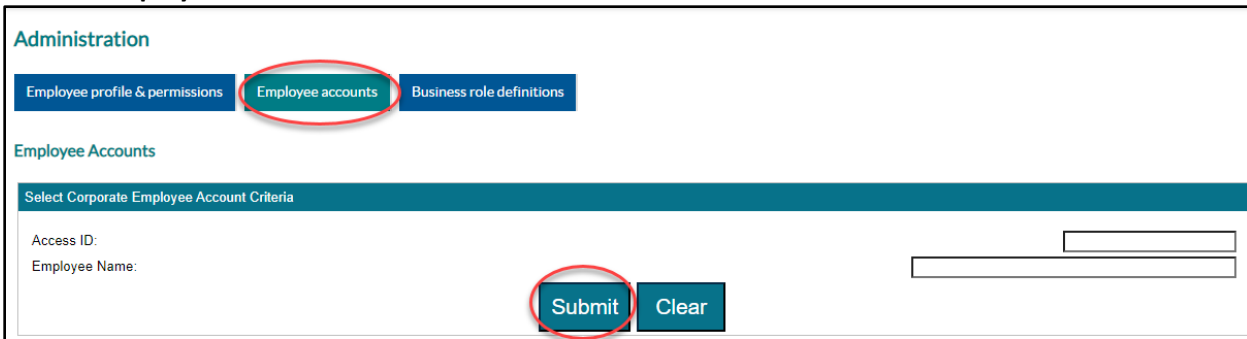


### Another option to add or update a user's account access -

Click on **Administration**



Click on **Employee Accounts** and click **Submit**



Employee List		
Name		Client Name
ACBAdmin	<a href="#">Reset Password/PIN</a>	ABC Company
AdminAdmin	<a href="#">Reset Password/PIN</a>	ABC Company
AdminUser	<a href="#">Reset Password/PIN</a>	ABC Company
AdminUser	<a href="#">Reset Password/PIN</a>	ABC Company
Test	<a href="#">Reset Password/PIN</a>	ABC Company
Testin_user	<a href="#">Reset Password/PIN</a>	ABC Company
Testin_user	<a href="#">Reset Password/PIN</a>	ABC Company

Click on the employee's name.

# Business Advantage Administration

## User Guide



Employee Accounts

Employee Account Access for "Testin user"

Add	Account Number	Account Type	Account Nickname	Change
<a href="#">Select All</a>				
<input type="checkbox"/>	<a href="#">XXXX3263</a>	Demand Deposit	Smart Account	<input checked="" type="checkbox"/> X
<input type="checkbox"/>	<a href="#">XXXX9111</a>	Demand Deposit	1	<input checked="" type="checkbox"/> X
<input type="checkbox"/>	<a href="#">XXXX9222</a>	Demand Deposit	2	<input checked="" type="checkbox"/> X
<input type="checkbox"/>	<a href="#">XXXXXX7899</a>	Demand Deposit	Analysis	<input checked="" type="checkbox"/> X
<input type="checkbox"/>	<a href="#">XXXXXX0456</a>	Demand Deposit	Basic Business	<input checked="" type="checkbox"/> X
<input type="checkbox"/>	<a href="#">XXXXXX0000</a>	Demand Deposit	Money Market Investment	<input checked="" type="checkbox"/> X
<input type="checkbox"/>	<a href="#">XXXXXX0101</a>	Demand Deposit	Regular Savings	<input checked="" type="checkbox"/> X
<input type="checkbox"/>	<a href="#">111</a>	Loan	CONS Unsecured	<input checked="" type="checkbox"/> X
<input type="checkbox"/>	<a href="#">170</a>	Loan	USDA Fixed	<input checked="" type="checkbox"/> X
<input type="checkbox"/>	<a href="#">171</a>	Loan	VA Fixed	<input checked="" type="checkbox"/> X
<input type="checkbox"/>	<a href="#">172</a>	Loan	FHA Fixed	<input checked="" type="checkbox"/> X
<input type="checkbox"/>	<a href="#">173</a>	Loan	Portfolio Fixed	<input checked="" type="checkbox"/> X
<input type="checkbox"/>	<a href="#">174</a>	Loan	Portfolio ARM	<input checked="" type="checkbox"/> X
<input type="checkbox"/>	<a href="#">175</a>	Loan	Conv Fixed	<input checked="" type="checkbox"/> X
<input type="checkbox"/>	XXXX9333	Demand Deposit	3	<input type="checkbox"/>
<input type="checkbox"/>	XXXX9555	Demand Deposit	4	<input type="checkbox"/>
<input type="checkbox"/>	XXXX9789	Demand Deposit	5	<input type="checkbox"/>

**Add:** click the check box to add an account to the user's access

**Remove:** click on the X to remove an account from the user's access.

Click **Submit**

Administration

Employee profile & permissions | **Employee accounts** | Business role definitions

Employee Accounts

New User Account Access

Account Number	Account Type	Status
XXXX9333	Demand Deposit	<input checked="" type="checkbox"/>

Deleted User Account Access

No Deleted Account Access Specified.

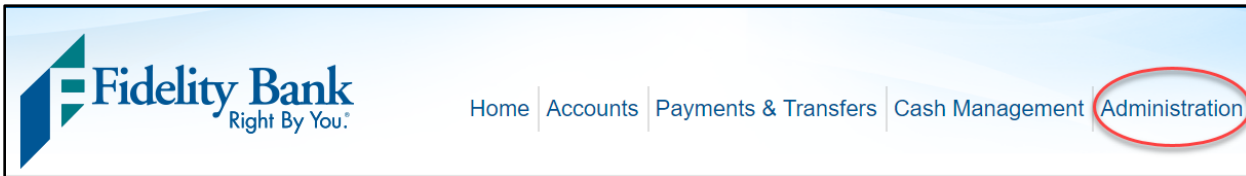
Done

Once the status column has green checkmark, click **Done**.

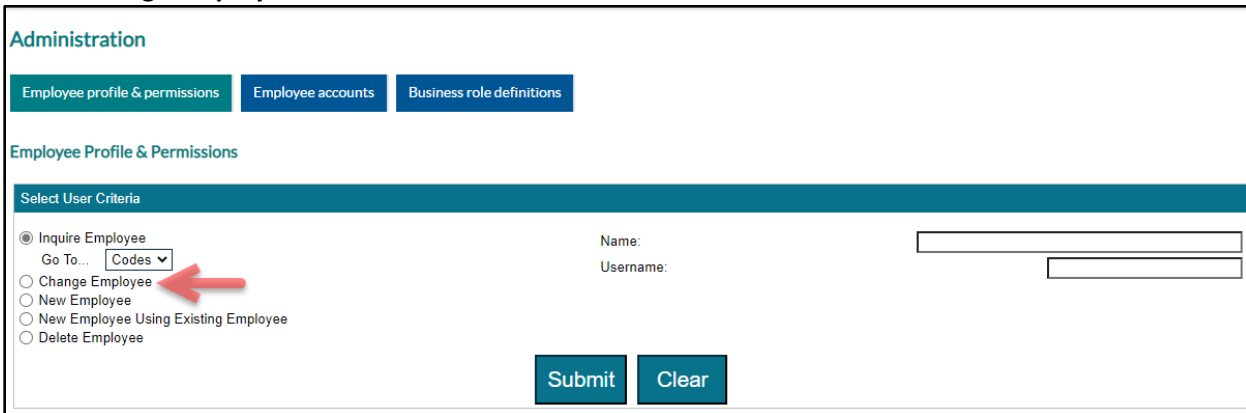


### Password Reset

Click on **Administration**.



Select **Change Employee** and click **Submit**.



Once the list of employees displays, click **Reset Password/PIN** for the applicable employee.





Administration

Employee profile & permissions Employee accounts Business role definitions

Employee Profile & Permissions

Reset Password

User

Name:	Testin user
View Type:	Corporate
Client Name:	ABC Company
Client Number:	32788

Contact Method

E-mail Address:

Security

Username:	jsutatestuser
Security Question:	
Security Answer:	
Date Last Password Expired:	

Submit Cancel

Verify the employee's email address. Click **Submit**.

Administration

Employee profile & permissions Employee accounts Business role definitions

Employee Profile & Permissions

Send Emails

Message	Status
Change Password Message (r[redacted].com)	✔

Finish

Click **Finish**. The employee will receive an email with a temporary password to use during their next login.