



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.

The screenshot shows the Greenfield Savings Bank Business Online interface. At the top, a dark teal header contains the user's name 'Welcome, Jared Cyhowski', the last login time 'Last log in: Jan 18, 2024', and navigation links for 'Contact Us', 'Locations', 'Alerts', 'Mail', 'Chat', 'Profile', and 'Log Out'. Below the header is the Greenfield Savings Bank logo. A horizontal navigation bar includes 'Home', 'Accounts', 'Payments & Transfers', 'Checks', and 'Administration', with an orange arrow pointing to 'Administration'. The main content area is divided into three sections: 'Alerts' with a 'Stay Alert' section and an 'Enroll' button; 'Accounts' with a table showing account details for 'Japan Adventure 2022' and an available balance of '\$112.80'; and 'Pay Or Transfer' with buttons for 'Internal' and 'Bill pay', each with a 'Show' dropdown. A 'Quick Launch' section with a 'User Guides' button is also visible.

2. Select Employee Profile & Permissions

Administration

- Employee Profile & Permissions
- Employee Accounts
- Business Role Definitions

Employee Profile & Permissions

Select User Criteria

Inquire Employee Name:
 Go To... Codes Username:
 Change Employee
 New Employee
 New Employee Using Existing Employee
 Delete Employee

Submit Clear

3. Select New Employee and click submit.

Administration

- Employee Profile & Permissions
- Employee Accounts
- Business Role Definitions

Employee Profile & Permissions

Select User Criteria

Inquire Employee
 New Employee
 Change Employee
 New Employee Using Existing Employee
 Delete Employee

Submit Clear

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

New Employee

Codes

* Indicates Required Field

* Name: Harry Dresden

Tax ID Code: Not Present

Tax ID Number:

Security Level: Employee

Mother's Maiden Name: Blackstone

Employee Group: Non-Admin

Transaction Exports: Yes

City born in?	Chicago
Mother's maiden name?	Blackstone
Free Form Question	Dog's Name
Free Form Answer	Mouse
(None)	<input type="text"/>
(None)	<input type="text"/>

- a. **Name** should be the full name of the new employee
- b. **Security Level** is the user's approval authority. Employee Level will need approval to any Bill Payments sent. Administrator Level 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.

Contact Methods		
E-mail Address:	<input type="text" value="mjohnson@greenfieldsavings.com"/>	
Business Phone:	<input type="text" value="413-775-8186"/>	
Business Phone Ext.:	<input type="text" value="0"/>	
Mobile Phone:	<input type="text"/>	
Client Details		
<input checked="" type="checkbox"/>	Client Name	Client Number
	Mrs J's Sweet Shoppe	222222222
		Client Tax ID
		22222222

- 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.

Security	
* Username:	<input type="text" value="hdresder"/> Change Password
PIN:	<input type="text"/>
Terms Acceptance Date:	

- 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.

- I. **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.

New Employee 1 - Codes

Change Password

New Password: [masked]

Confirm Password: [masked]

Submit Cancel

Multifactor Authentication

Token Status: (None) [v]

Token Type: (None) [v]

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

Mobiliti Business

Mobiliti Business access is enabled. Uncheck the checkbox to disable Mobiliti Business access.

No Devices Registered

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

Role Assignment

* Role Name

Mrs Js Sweet Shoppe Employee [v]

[Add Role](#)

- 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.

Accounts		
To grant account access for this Employee 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"/>	[REDACTED]	Checking Expenses
<input type="checkbox"/>	[REDACTED]	Checking Incoming Funds
Certificate Of Deposit		
Access	Account Number	Account Nickname
Select None		
<input checked="" type="checkbox"/>	[REDACTED]	CD
Consumer Loans		
Access	Account Number	Account Nickname
Select None		
<input checked="" type="checkbox"/>	[REDACTED]	When Things Go Wrong
Commercial Loans		
Access	Account Number	Account Nickname
Select None		
<input checked="" type="checkbox"/>	[REDACTED]	Loan

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

Overrides	
Cutoff Group Override:	Use Default ▼
Approval Options	
Review Internal Transfers:	No ▼

- 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.

Fund Transfer Options	
Inquire Transfers:	Yes ▼
Initiate Transfers:	Yes ▼

- 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.

Merchant Capture Options			
Merchant Capture Option:	Direct Merchant Access	Per Item Limit:	0.00
Role:	Limited	Per Deposit Limit:	0.00
View Client Deposits:	No	Per Day Limit:	0.00

- 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.

Stop Payments	
Inquiry:	Yes
New:	Yes

- 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.

Interface Specifications		
Interface	User Code	Password
Business Bill Pay		
Notifi		
<input checked="" type="checkbox"/> Enables employee access to customer alerts for name, address, and phone number changes for the Business.		
(None)		

- 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.

Electronic Documents	
<u>Disable All</u>	Document
<input checked="" type="checkbox"/>	Check Image
<input checked="" type="checkbox"/>	Check Deposit Images

- 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.

The screenshot shows the Greenfield Savings Bank Business Online interface. At the top, a dark teal header contains the user's name "Welcome, Jared Cyhowski" and "Last log in: Jan 18, 2024", along with navigation links for "Contact Us", "Locations", "Alerts", "Mail", "Chat", "Profile", and "Log Out". Below the header is the Greenfield Savings Bank logo. A secondary navigation bar includes "Home", "Accounts", "Payments & Transfers", "Checks & Deposits", and "Administration", with an orange arrow pointing to the "Administration" tab. The main content area is divided into several sections: "Alerts" with a "Stay Alert" message and an "Enroll" button; "Accounts" showing a table with one entry: "Japan Adventure 2022" with account number "*****2257" and an available balance of "\$112.80"; "Pay Or Transfer" with buttons for "Internal" and "Bill pay"; and "Quick Launch" with a "User Guides" link.

2. Select Employee Profile & Permissions

The screenshot shows the "Administration" page in the Business Online interface. The "Administration" tab is selected in the top navigation bar. Below it, three sub-tabs are visible: "Employee Profile & Permissions", "Employee Accounts", and "Business Role Definitions", with an orange arrow pointing to the "Employee Profile & Permissions" tab. The "Employee Profile & Permissions" section contains a "Select User Criteria" form. This form has a radio button selected for "Inquire Employee" and a "Go To..." dropdown menu set to "Codes". There are also radio buttons for "Change Employee", "New Employee", "New Employee Using Existing Employee", and "Delete Employee". To the right of the form are input fields for "Name:" and "Username:". At the bottom of the form are "Submit" and "Clear" buttons.

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.

Select User Criteria

Inquire Employee
 Change Employee
 New Employee
 New Employee Using Existing Employee
 Delete Employee

Name:
Access ID:

Go To... Codes

Employee List

Name	Client Name
April O'Neil	Wild Flour Bakery
Mikey Turtle	Wild Flour Bakery
Splinter Rat	Wild Flour Bakery

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

Delete Employee

Name: Mikey Turtle Access ID: mturtle

Contact Methods

E-mail Address:
Business Phone:
Business Phone Ext.: 0
Mobile Phone:

Client Details

Client Name	Client Number	Client Tax ID
<input checked="" type="checkbox"/> Wild Flour Bakery	3003799055	239999923

Message from webpage

Are You Sure You Want To Delete This Codes Employee?

- 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

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

The screenshot shows the Greenfield Savings Bank Business Online interface. At the top, a dark green header contains the user's name "Welcome, Jared Cyhowski", the last login time "Last log in: Jan 18, 2024", and navigation links for "Contact Us", "Locations", "Alerts", "Mail", "Chat", "Profile", and "Log Out". Below the header is the Greenfield Savings Bank logo. A navigation bar below the logo shows "Home", "Accounts", "Payments & Transfers", "Checks & Deposits", and "Administration" (which is highlighted with an orange arrow). The main content area is divided into several sections: "Alerts" with a "Stay Alert" message and an "Enroll" button; "Accounts" with a table showing account details for "Japan Adventure 2022" (****2257) with an available balance of \$112.80; "Pay Or Transfer" with buttons for "Internal" and "Bill pay"; and "Quick Launch" with a "User Guides" button.

- Select Employee Profile & Permissions

The screenshot shows the "Administration" section of the Business Online interface. The navigation bar at the top includes "Home", "Accounts", "Payments & Transfers", "Checks & Deposits", and "Administration". Below the navigation bar, the "Administration" section is active, and three sub-tabs are visible: "Employee Profile & Permissions" (highlighted with an orange arrow), "Employee Accounts", and "Business Role Definitions". The "Employee Profile & Permissions" sub-tab is selected, displaying a "Select User Criteria" form. The form includes radio buttons for "Inquire Employee" (selected), "Change Employee", "New Employee", "New Employee Using Existing Employee", and "Delete Employee". There are also input fields for "Name:" and "Username:", and "Submit" and "Clear" buttons at the bottom.

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.

Employee Profile & Permissions

Select User Criteria

Inquire Employee
 Change Employee
 New Employee
 New Employee Using Existing Employee
 Delete Employee

Go To... Codes

Name:

Username:

Submit Clear

Name	Client Name
Buffy Summers	Mrs J's Sweet Shoppe
Cayde Sixx	Mrs J's Sweet Shoppe
Harry Dresden	Mrs J's Sweet Shoppe
Melanie Johnson	Mrs J's Sweet Shoppe
Shannon Manzi	Mrs J's Sweet Shoppe

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.

Mobiliti Business

Mobiliti Business access is disabled. Check the checkbox to enable Mobiliti Business access.

No Devices Registered

Employee Profile & Permissions

Save

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.

Save

Approval Options

Review Internal Transfers: No

Approve Transfers: No

Fund Transfer Options

Inquire Transfers: No

Initiate Transfers: No

- 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.
- 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.

Employee Profile & Permissions



Add or Remove Employee Access to Accounts

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

Welcome, Jared Cyhowski
Last log in: Jan 18, 2024

Contact Us Locations Alerts Mail Chat Profile Log Out

Greenfield Savings Bank

Home Accounts Payments & Transfers Checks & Administration

Alerts

Stay Alert
Know about changes to your finances and online security. Choose when and what alerts you get by email or text message.
Enroll

Accounts Edit Accounts Print

Japan Adventure 2022 Available Balance \$112.80 Recent

Pay Or Transfer

Internal Show
Bill pay Show

Quick Launch

User Guides

2. Select Employee Accounts

Home Accounts Payments & Transfers Checks & Deposits Administration

Administration

Employee Profile & Permissions **Employee Accounts** Business Role Definitions

Employee Accounts

Select Corporate Employee Account Criteria

Access ID:

Employee Name:

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.

Select Corporate Employee Account Criteria

Access ID:

Employee Name:

Corporate Employee List

User Name	Access ID
Amanda Wild	awild
April O'Neil	aoneil
Mikey Turtle	mturtle
Splinter Rat	srat

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.

Employee Account Access for "Mikey Turtle"

Add	Account Number	Account Type	Account Nickname	Change
<input checked="" type="checkbox"/>	*****5507	Demand Deposit	Checking 5507	<input type="checkbox"/> <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	*****2257	Savings	Savings 2257	<input type="checkbox"/> <input checked="" type="checkbox"/>
<input type="checkbox"/>	*****0001	Commercial	Commercial 0001	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	*****8888	Installment	HELOC 8888	<input type="checkbox"/> <input type="checkbox"/>

5. Adding confirmation will display and click done.

New User Account Access		
Account Number	Account Type	Status
*****0001	Commercial	

Deleted User Account Access		
No Deleted Account Access Specified.		

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

Employee Account Access for "Mikey Turtle"					
Add	Account Number	Account Type	Account Nickname	Change	
Select All					
<input type="checkbox"/>	*****5507	Demand Deposit	Checking 5507		
<input type="checkbox"/>	*****2257	Savings	Savings 2257		
<input type="checkbox"/>	*****0001	Commercial	Commercial 0001		
<input type="checkbox"/>	*****8888	Installment	HELOC 8888		

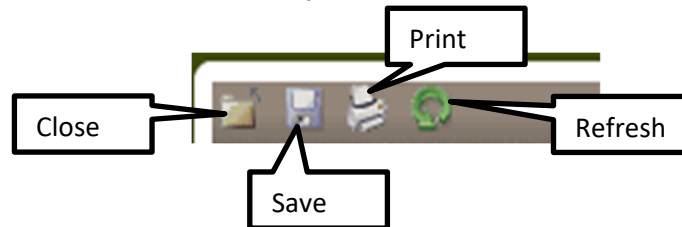
7. The Delete confirmation will display and click done.

New User Account Access		
No New Account Access Specified.		

Deleted User Account Access		
Account Number	Account Type	Status
*****0001	Commercial	

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.