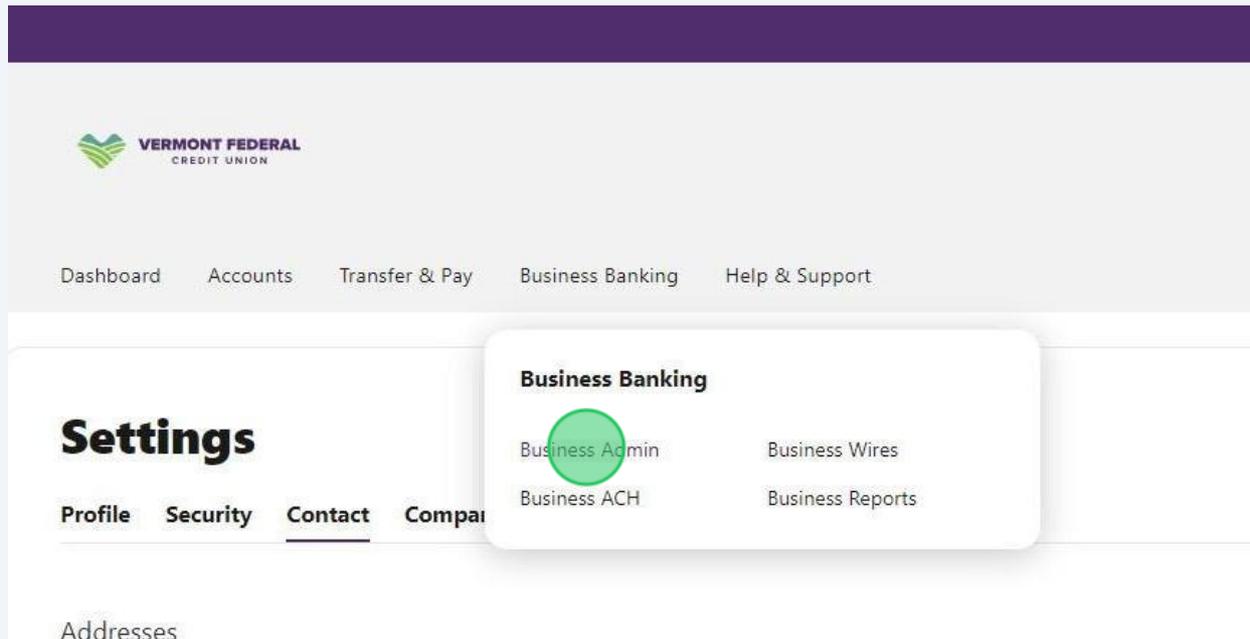


Getting Started: Business Banking - Business Administration Tools



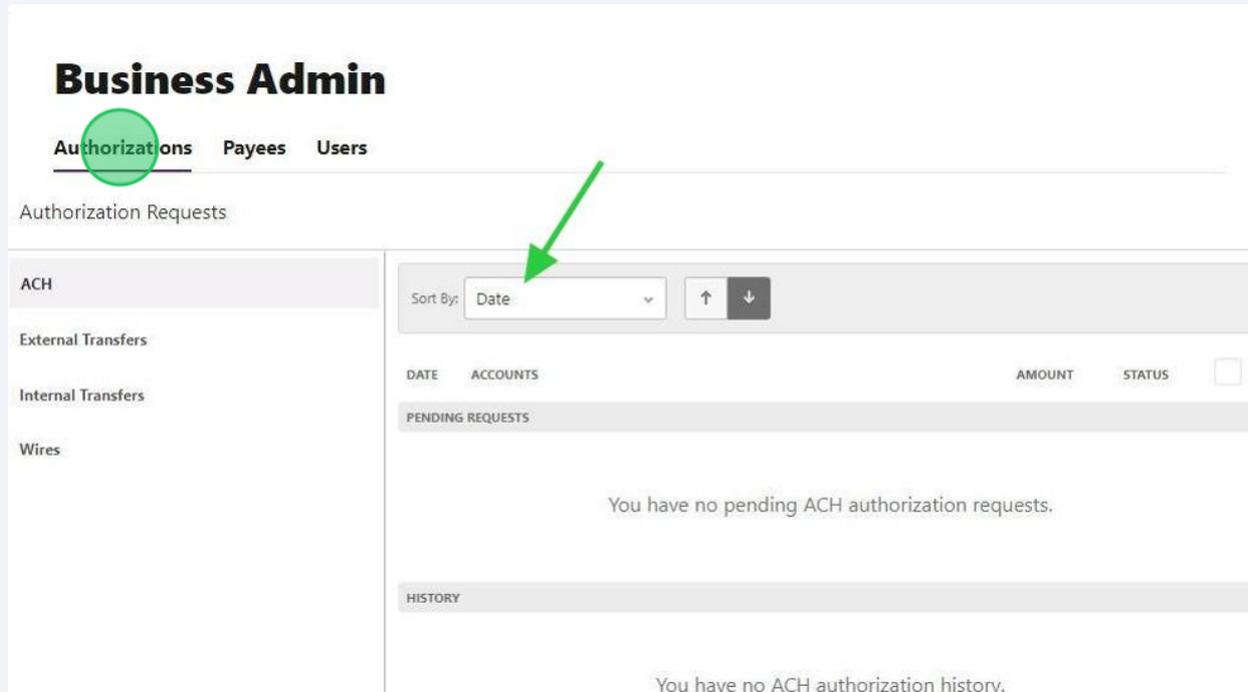
1 Access Business Admin Settings

- Navigate to the Login Page: [Vermont Federal Credit Union](#)
- Navigate to the **Business Banking** tab.
- Click **Business Admin**



2 Business Banking Authorizations

- **Authorizations** will show what authorized ACH, External Transfers, Internal Transfers, and Wires requests are scheduled or have already been processed
- Using the **Sort By** function, you can filter your Authorized transactions



Business Admin

Authorizations Payees Users

Authorization Requests

ACH

External Transfers

Internal Transfers

Wires

Sort By: Date

DATE ACCOUNTS AMOUNT STATUS

PENDING REQUESTS

You have no pending ACH authorization requests.

HISTORY

You have no ACH authorization history.

3 Business Banking Payees

- Within **Business Admin** click the **Payees** Tab
- **Payees** will show all payees associated with your business banking profile
- You can review previously created Payees and create new Payees.

Business Admin

Authorizations **Payees** Users

All payees

 Add New Payee

🔍 Search By Name Or Payee ID

Type: All ▾ Payment Methods: All ▾ Groups: All ▾

NAME ↕	PAYEE ID ↕	GROUP ↕	PAYMENT METHODS
 James		Employees	1 ACH

4 Add New Business Banking Payee

- Select **Add New Payee** to add a new payee

Business Admin

Authorizations **Payees** Users

All payees

 Add New Payee

🔍 Search By Name Or Payee ID

Type: All ▾ Payment Methods: All ▾ Groups: All ▾

NAME ↕	PAYEE ID ↕	GROUP ↕	PAYMENT METHODS
 James		Employees	1 ACH

5 Add New Business Banking Payee

- Enter payee **Full Name** (Required)
- Enter payee **Email Address** and **Payee ID** (Recommended) Enter payee **Address** (Required)

Note: To use the wire functionality you will need to enter an address for the payee.

Full Name *

0 / 35

Email (Optional)

Payee ID (Optional)

We will create a Payee ID for you, or you can enter your own Payee ID.

Payee's address is required to utilize wire payment methods.

 Add address

 Add phone number (Optional)

 Add website (Optional)

6 Viewing Your Payees

- You can view a **Payee's** information screen by clicking on their **Name**
- View any Payment History, Scheduled Payments, Payment Methods, and Contact Info

Business Admin

Authorizations Payees Users

All payees

[+ Add New Payee](#)

🔍 Search By Name Or Payee ID

Type: All ▼ Payment Methods: All ▼ Groups: All ▼

NAME ⬆	PAYEE ID ⬆	GROUP ⬆	PAYMENT METHODS
 James		Employees	1 ACH

7

Viewing Business Admin Users

- Within **Business Admin** click the **Users** tab
- The **Users** menu will show all business sub-users set up for your business
- You can see name of the user, the number of accounts they have access to, the payment types they can access, and their status

Business Admin

Authorizations Payees

Users

All Users

Search By Name (First Or Last)



USER	ACCOUNTS	PAYMENT TYPES	STATUS	
 Bill Smith	1	Internal Transfers	ACTIVE	...
 BTest Dan	4	Internal Transfers, External Transfers, Bill Pay	ACTIVE	...
 Test Testing	2	Wires, Internal Transfers, External Transfers, Bill Pay	ACTIVE	...

8 Editing Business Sub Users

- Click on the ellipses on the right side of the user name to edit a user.
- This will show you their account information in more detail and allow you to manage their **Accounts and Permissions**
- You can change the User's **Status**, **Create a Similar User**, **Reset Users Password**, or **Delete the User**

Business Admin

Authorizations Payees Users

All Users

🔍 Search By Name (First Or Last)



USER	ACCOUNTS	PAYMENT TYPES	STATUS	
 Bill Smith	1	Internal Transfers	ACTIVE	⋮ 
 BTest Dan	4	Internal Transfers, External Transfers, Bill Pay	ACTIVE	⋮
 Test Testing	2	Wires, Internal Transfers, External Transfers, Bill Pay	ACTIVE	⋮

9 Add New Business Sub Users

- You can create a new user by pressing the "+" button to the right of the "Search by Name" bar
- To see a full guide for how to complete this step please reference the "Create A New Business Sub User" guide

Business Admin

Authorizations Payees Users

All Users

🔍 Search By Name (First Or Last)



USER	ACCOUNTS	PAYMENT TYPES	STATUS	
 Bill Smith	1	Internal Transfers	ACTIVE	...
 BTest Dan	4	Internal Transfers, External Transfers, Bill Pay	ACTIVE	...
 Test Testing	2	Wires, Internal Transfers, External Transfers, Bill Pay	ACTIVE	...