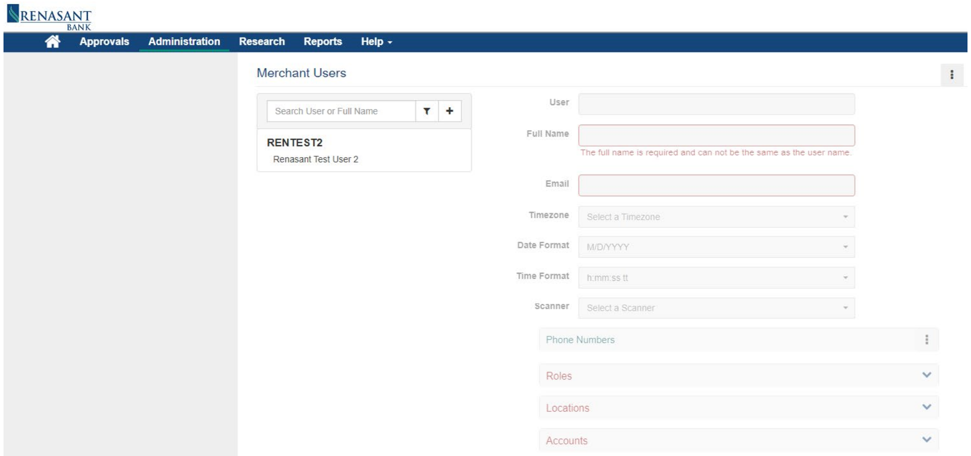
Administration

Business Check Express (BCE) Service

This guide describes the functionality that you can utilize as the administrator for your company. This will allow you to complete functions such as adding new users, changing account access, resetting user passwords, etc.

For assistance, contact Renasant Treasury Solutions Support at 844.680.3739, Monday through Friday 7 AM CT/8 AM ET to 5 PM CT/6 PM ET.

As the administrator, you have access to the Administration option in the menu bar at the top of the screen.



Adding a New User

Add new users to the system by selecting the add icon (**+**) in the left pane. Provide values for the username, full name, and email address. You also add one or more phone numbers, assign a default scanner, and assign one or more roles, locations, and accounts.

1. Select **Administration** to access the **User Administration** page.
2. In the left pane, select the add icon (**+**) to update the right pane with the options for adding a new user.
3. For **User**, enter the login ID for the user. This is what the user will use in combination with a password to log in.
4. For **Full Name**, enter the full name for the user.
5. For **Email**, enter the email address for the user. This email address is used for password resets and other system emails, so it is important to verify what you entered is correct.
6. Configure the timezone and date/time format settings for the user:
    a. For **Timezone**, select the appropriate timezone for the user's location.

       For example, if you were located on the east coast of the United States and were observing Daylight Savings Time, then you would choose Eastern Daylight Time.

    b. For **Date Format**, select the appropriate date format.

       For example, if you select MM/DD/YYYY (two digit month, two digit day, four digit year), then the system would format February 1, 2022 as 02/01/2022.

    c. For **Time Format**, select the appropriate time format.

       H represents hours in a 24 hour format. (For example, 5:00 pm is 17). h represents hours in a 12 hour format and is typically paired with tt, (AM or PM). mm represents minutes.

- These settings determine how dates and times are displayed in DirectLink Merchant. For example, when users search for deposits, they can specify a **Start Date**. When users view search results, they see the date and time when a deposit is submitted. When users log in to the system, they are shown the last date and time they logged in. These dates and times are all formatted according to these settings. Note, these settings do not affect virtual deposit tickets or emails sent by the system, and users can change these settings in their user profile.

7. For **Scanner**, select a default scanner for the user.
8. To add a phone number:
    a. In the **Phone Numbers** section, select the menu icon (⋮) and select **Add**.
        - For **Name**, enter a description for this number. For example, you could enter Office for the user's office phone, or Mobile for the user's cell phone
        - For **Country Code**, select the country for the phone number. The system uses this value to apply the correct country code when making calls for user authentication purposes.
        - For **Phone Number**, enter the phone number with the area code and omitting spaces. You can include dashes or omit them. For example, 888-418-6824 or 8884186824.
        - If the phone number has an extension, then for **Ext**, enter that value.

    b. Select the add icon (**+**) to add the number to the list. The phone number is required.
9. To assign the roles to the user profile:
    a. Select the more icon (**...**) for the **Roles** section to open the **Select Roles** window.
    b. Select the roles you want to assign to the user. You can also select the menu icon (⋮) and then **Select All** to assign all the roles.
    c. Select **Done** to save your selections and close the window.
10. To add locations to the user profile:
    a. Select the more icon (**...**) for the **Locations** section to open the **Select Locations** window.
    b. Select the locations you want to assign to the user. You can also select the menu icon (⋮) and then **Select All** to assign all the locations.
    c. Select **Done** to save your selections and close the window.
11. To add the accounts to the user profile:
    a. Select the more icon (⋮) for the **Accounts** section to open the **Select Accounts** window.
    b. Select the accounts you want to assign to the user. You can also select the menu icon (⋮) and then **Select All** to assign all the accounts.
    c. Select **Done** to save your selections and close the window.
12. To change the order of the locations or accounts:
    - Select the list number field for the item you want to change, and drag the item up or down in the list to change its position.

      For example, if you have assigned four accounts, and you want to make the last one in the list show up as the first one, then you would select the field with the number 4, hold down with your mouse, and drag the list item to the first position in the list. The system then assigns that list item as number 1, with the other accounts reordered as appropriate.
    - Select the list number field for an item and enter a new number value for that item.

      For example, if you have assigned access to three locations, and you want to make the first item in your list the last item in your list, then you would select the field for the first position and change the value from 1 to 3.

    » Note: Users can manage the order of locations and accounts for themselves when working with their user profiles, so this step is optional.
13. When finished, select **Save**.

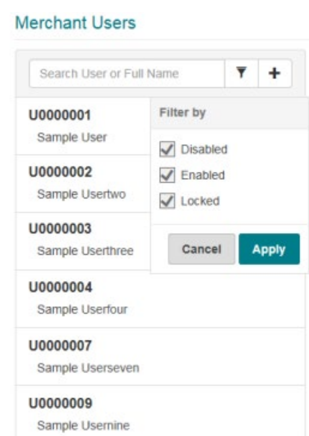
Editing Existing Users

Once users have been added to the system, you can:

- Edit user profiles to update user information or assign different roles, locations, or accounts.
    - » Note: You cannot change the username for a profile once that profile has been saved. If you need to change a username, then you must delete the existing profile and create a new one with the new username.
- Disable users or make disabled or locked users active again.
- Reset user passwords. When you reset a user's password, the system sends an email notification with a link to the self-service password reset page. This notification is sent to the email address in that user's profile.
- Reset user security questions. When you reset a user's security questions, the system sends an email to the email address in that user's profile.
- Remove users.

» Note: The features you can access depend on the roles that have been assigned to you.

Selecting Users to Edit



By default, when you access the **Administration** page, the system lists all the users for your merchant. You can use the search field and filter icon to more easily find a specific user.

Enter the username or the full name into the search field to limit the list to items containing that string of characters. As soon as you start entering a value, the list updates based on what you entered.

Select the filter icon to open a window that enables you to show disabled users, enabled users, and locked users. Administrators often use these options to quickly locate disabled or locked users, so that they can reset them.

Edit a User

1. Select **Administration** to access the **User Administration** page.
2. From the list of users, select the user you want to edit. You can use the search field or filter button to find a specific user.
    - To change a user's full name, enter a new value for **Full Name**.
    - To change the user's email address, enter a new value for **Email**.
        - » Note: The email address is used to send emails for password resets, so it is important to verify what you entered is correct.
    - To change the timezone and date/time format settings for the user:
        - » For **Timezone**, select the timezone for the user's location. For example, if you were located on the east coast of the United States and observing Daylight Saving Time, then choose Eastern Daylight Time.
        - » For **Date Format**, select the appropriate date format.

          For example, if you select MM/DD/YYYY (two digit month, two digit day, four digit year), then the system would format February 1, 2022 as 02/01/2022.
        - » For **Time Format**, select the appropriate time format.

          H represents hours in a 24 hour format. (For example, 5:00pm is 17). h represents hours in a 12 hour format and is typically paired with tt, (AM or PM). mm represents minutes.

    These settings determine how dates and times are displayed in DirectLink Merchant. For example, when users search for deposits, they can specify a **Start Date**. When users view search results, they can see the date and time when a deposit is submitted. When users log on to the system, they are shown the last date and time they logged on. These dates and times are all formatted according to these settings. Note however that these settings do not affect virtual deposit tickets or emails sent by the system. Also note that users can change these settings in their user profile as necessary.

- To change the default scanner assigned to the user, select a new value for **Scanner**.
- To add a phone number, in the **Phone Numbers** section, select the menu icon (⋮). Then select **Add** to show the fields to fill.
  - » For **Name**, enter a description for this number.

    For example, enter Office for the user's office phone or Mobile for the user's mobile phone.
  - » For **Country Code**, select the country for the phone number.

    For example, you could select United States. The system uses this value to apply the correct country code when making calls for user authentication purposes.
  - » For **Phone Number**, enter the phone number with area code, omitting spaces. You can include dashes or omit them. For example: 888-418-6824 or 8884186824
  - » If the phone number has an extension, then for **Ext**, enter that value.
  - » Select the add icon (**+**) to add the number to the list. The phone number is required.

3. To remove a phone number, then do the following:
   a. Under the **Phone Numbers** section, select the phone number you want to remove.
   b. Select the menu icon (⋮) and select **Remove**.
4. If you want to change the roles that are assigned to the user, then do the following:
   a. Select the more icon (**...**) for the **Roles** section to open the **Select Roles** window.
   b. Select or unselect the roles you want to assign to the user.
      - » You can also select the menu icon (⋮) and then **Select All** the roles or **Unselect All** the roles.

   c. Select **Done** to save your selections and close the window.
5. If you want to change the locations that are assigned to the user, then do the following:
   a. Select the more icon (**...**) for the **Locations** section to open the **Select Locations** window.
   b. Select or unselect the locations you want to assign to the user.
      - » Select the menu icon (⋮) and then **Select All** the locations or select **Unselect All** to unselect all of them.

   c. Select **Done** to save your selections and close the window.
6. If you want to change the accounts that are assigned to the user, then do the following:
   a. Select the more icon (**...**) for the **Accounts** section to open the **Select Accounts** window.
   b. Select or unselect the accounts you want to assign to the user.
      - » Select the menu icon (⋮) and then **Select All** the accounts or **Unselect All** the accounts.

   c. Select **Done** to save your selections and close the window.
7. If you want to change the order of the locations or accounts, then do one of the following:
   - Select the list number field for the item you want to change and drag the item up or down in the list to change its position.

     For example, if you have assigned four accounts, and you want to make the last one in the list show up as the first one, then you would select the field with the number 4, hold down with your mouse, and drag the list item to the first position in the list. The system then assigns that list item a number 1, with the other accounts reordered as appropriate.
   - Select in the list number field for an item and enter a new number value for that item.

     For example, if you have assigned access to three locations, and you want to make the first item in your list the last item in your list, then you would select the field for the first position and change the value from 1 to 3.
   - » Note: Users can manage the order of locations and accounts for themselves when working with their user profiles, so this step may not be necessary.
8. When finished making updates, select **Save**.

Disable a User

1. Select **Administration** to access the **User Administration** page.
2. From the list of users, select the user you want edit. You can use the search field or filter button to find a specific user as described on *Selecting Users to Edit* section.
3. Select the menu icon (⋮) for the user profile, and select **Disable User**.
4. The system will display a message that the user's status was changed successfully, and the icon to the right of the username changes to reflect the disabled status.

Make a Disabled or Locked User Active Again

1. Select **Administration** to access the **User Administration** page.
2. From the list of users, select the user you want to edit.
   - You can use the search field or filter button to find a user as described on *Selecting Users to Edit* section.
3. Select the menu icon (⋮) for the user profile, and do one of the following:
   - If the user was disabled, then select **Enable User**.
   - If the user was locked, then select **Unlock User**.
4. The system displays a message that the user's status was changed successfully, and the icon to the right of the user name changes to reflect the active status.

Reset a User's Password

This process can only be used if the site that the user is associated with is not using Single Sign-On (SSO) or if the user is enabled.

Once you initiate this process, the user will be required to change the password, even if the user remembers the current password and successfully logs in using it. A user can only change the password once every 24 hours.

1. Select **Administration** to access the **User Administration** page.
2. From the list of users, select the user you want to edit. You can use the search field or filter button to find a specific user, as described on the *Selecting Users to Edit* section.
3. Select the menu icon (⋮) for the user profile, and select **Reset Password**.
4. When prompted to confirm, select **OK**.
   - The system displays a message that the user's password has been changed successfully and sends an email notification to the user. The notification is sent to the email address in the user's profile. Your institution can customize the template used for the email notification.

At this point, the user should complete the following steps:

1. Locate the email and select the link (or copy and paste the URL into the address bar of the browser). The user should be redirected to the **Security Question** page. The link in the email expires after one hour.
2. Enter the appropriate answer to the security question.
3. Select **Continue** to display the **Reset Password** page.
4. For **New Password**, enter the appropriate password.
5. For **Confirm Password**, re-enter the same password.
6. Select **Submit**.
7. The system will display a confirmation message and sends a confirmation to the user's email address.

Delete a User

1. Select **Administration** to access the **User Administration** page.
2. From the list of users, select the user you want to edit. You can use the search field or filter button to find a specific user as described on *Selecting Users to Edit* section.
3. Select the menu icon ( ) for the user profile, and select **Delete User**.
4. When prompted to confirm, select **OK**.

Add a User Administrator

Roles	Privileges
Merchant Supervisor	Register User with Location and Scanner
	Modify Users
Merchant Depositor	Register User with Location and Scanner
	Finish Deposits
	View History, Including Transmitted Deposits
	View Reports
	Run/View Queries
	Create, Capture, Correct, Balance Deposits
	View Open Deposits
	View Recent Deposits
	Mark Items
Merchant Reviewer	View Reports
	View History
	Run/View Queries
Merchant Assessor	Completes Compliance Surveys
Deposit Manager	N/A - Do Not Use
Merchant Operator	N/A - Do Not Use

1. Select the accounts the user should have access to by checking the boxes to the left of each account. Enable All or Disable All accounts by clicking the appropriate option.
2. Select a Location and Scanner to register the user. A user must have a Location and Scanner assigned before capturing a deposit.
3. Click the Create User button to complete user setup.
4. An email with the automatically generated temporary password is sent to the user utilizing the email address.
5. The new user will now be displayed in the User Administration List.

Editing User Properties

An administrator can modify a user's properties, including email address, phone numbers, assigned deposit accounts, roles, and user registration information.