

## ONLINE BANKING COMMERCIAL AUTHORIZATIONS DASHBOARD

The Online Banking Commercial Authorizations Dashboard allows administrators to manage specific permissions for their business users. This dashboard provides the ability to your organization to control who has access to key digital services and account tools.

This dashboard provides controls for additional features HAPO offers such as:

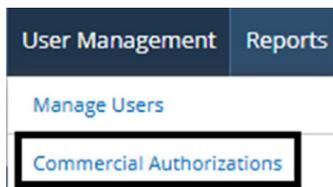
- ▶ Check Research
- ▶ Check Stop Payments
- ▶ e-Statements
- ▶ Secure Messaging

### Granting and adjusting permissions as a Business Administrator

Administrators can access all features that have been enabled for the business(s). To grant or remove access, administrators will do so for each Business User, each entity and associated accounts.

Once an email request has been received, the Business Administrator will follow the steps below to grant access to the additional HAPO feature(s).

1. Hover over **User Management**
2. Select **Commercial Authorizations**



3. If more than one entity is associated with your Online Banking profile, select the applicable entity Tax ID. If there are no additional associated entities, you will automatically be presented with the User Management page

Tax ID Selection

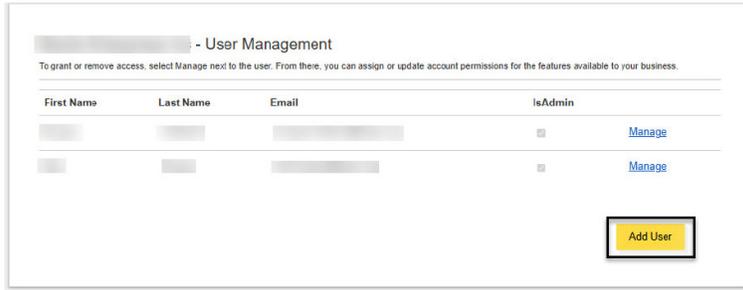
Select a Tax ID name:

[Redacted]

[Redacted]

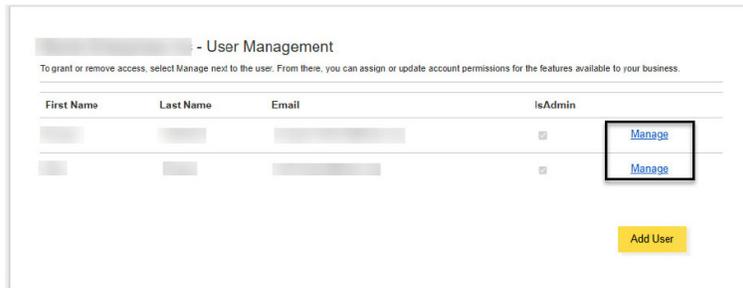
[Redacted]

4. A Business Administrator may add users to the Commercial Authorizations dashboard by selecting **Add User**. *NOTE: Users must be added via the Manage Users page under the User Management menu. After, the business user creates their initial login credentials, the username must be provided by the business user to the business administrator and entered exactly as the business user created in order to add it to the commercial authorizations tool.*



Business users may also request access by selecting a permission-based feature within online banking. This method will generate an access request for administrator approval via email.

5. Once a business user has either requested access or the business administrator has added a user for access, the business administrator will select **Manage** next to the user.



6. On the Account Permissions page you will see displayed:

- ▶ The selected user's name
- ▶ All accounts associated with the selected entity

Each account listed will show available permission-based features. To grant access, locate the account(s) and select the checkbox for each feature to grant access to the user.

Additional permissions, such as Secure Messaging, may also be enabled by selecting the applicable option. Secure Messaging is not account specific.

The screenshot displays the 'Account Permissions for [redacted]' page. It features two main sections: 'Account Authorizations' and 'Additional Features'. The 'Account Authorizations' section contains a table with the following columns: 'Account Number', 'E-Statements', 'Stop Payments', and 'Check Research'. There are six rows of accounts. The first row has all checkboxes unchecked. The second and third rows have 'E-Statements' and 'Check Research' checked. The fourth, fifth, and sixth rows have all checkboxes unchecked. To the right, the 'Additional Features' section has a single checkbox for 'Secure Messaging', which is unchecked. At the bottom, there are 'Back' and 'Save' buttons. A note at the bottom of the table reads: '\* Next to each account, check the boxes under each feature to authorize access.'

Account Number	E-Statements	Stop Payments	Check Research
[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[redacted]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[redacted]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[redacted]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

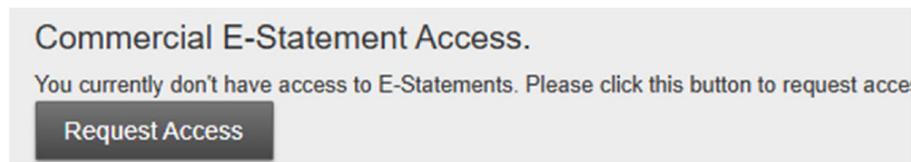
Once all selections are complete, click **Save** to apply the changes. The user will have access to the selected accounts and features. You may return to this page at any time to update permissions as needed.

**NOTE:** Steps 5-6 will need to be repeated for each entity attached or newly added to the business online banking profile. To access another entity repeat steps 1-3.

## Requesting access as a Business User

Before a Business User can access a permission-based feature, they must first follow the steps below to request access.

1. From the main menu, hover your cursor over **eServices**.
2. **Click** a permission-based feature such as:
  - ▶ Check Research
  - ▶ Check Stop Payment
  - ▶ e-Statements
  - ▶ Secure Message
3. A pop-up box will present, click **Request Access**. An email request is sent to the Business Administrator to log in and grant access. An additional option is to provide your exact username, as you enter it, to the business administrator and they can proactively grant access to these features.
  - a. If multiple entities, the business user must go to eServices and select the feature under a new entity each time.



4. Once permission is granted, a business user may access the permission-based features for the applicable accounts.
  - a. If there are multiple entities within the business online banking profile, the admin must grant access for each entity.

**NOTE:** *Business Administrators will need to continue to grant access to any newly added accounts once initial approval has been granted.*