First National Bank and Trust Company

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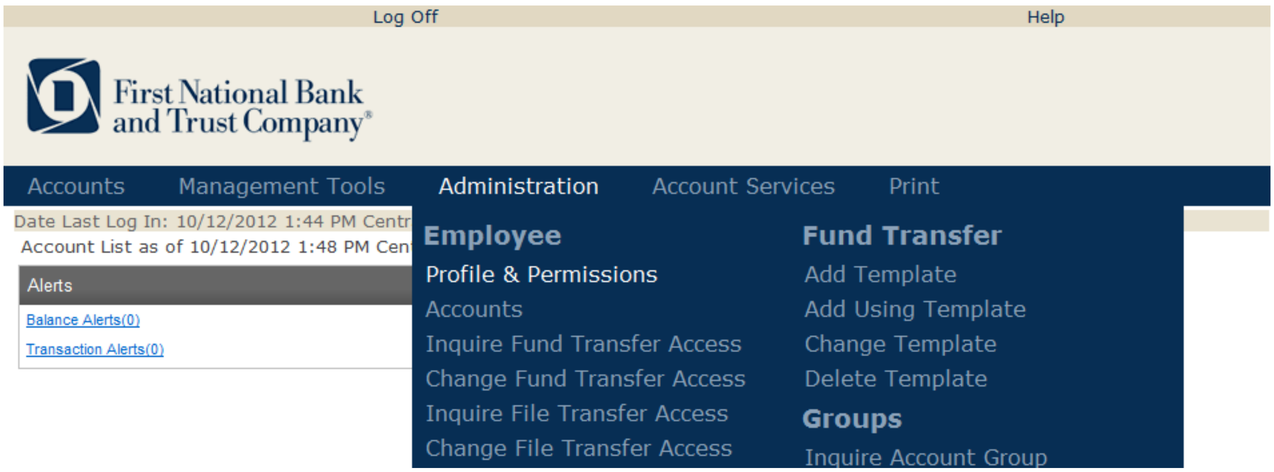
# First B2B: Client Administration Guide

## New User Setup

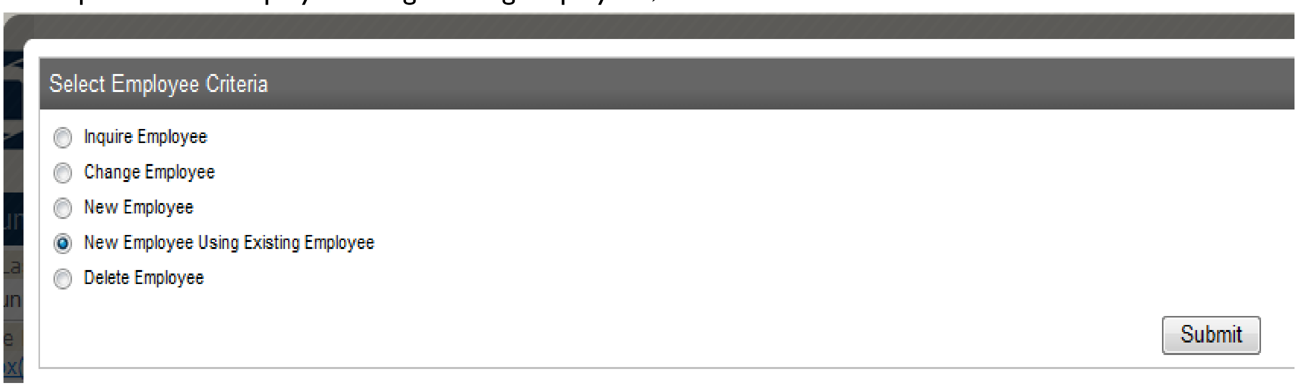
1) Login to FirstB2B System.

    a. 

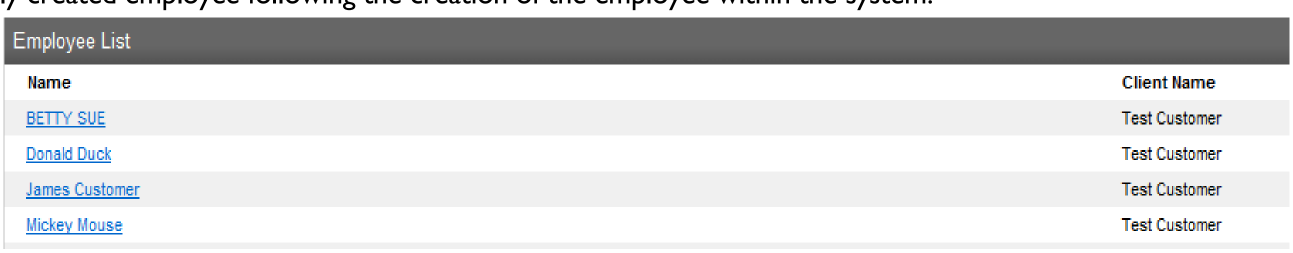

2) Mouse over the Administration menu and scroll down to click on Profile & Permissions.

    a. 


3) Click on the option "New Employee Using Existing Employee", and then click on the submit button.

    a. 


4) Select the employee that you will be copying the security from. Remember, you can adjust the security level of the newly created employee following the creation of the employee within the system.

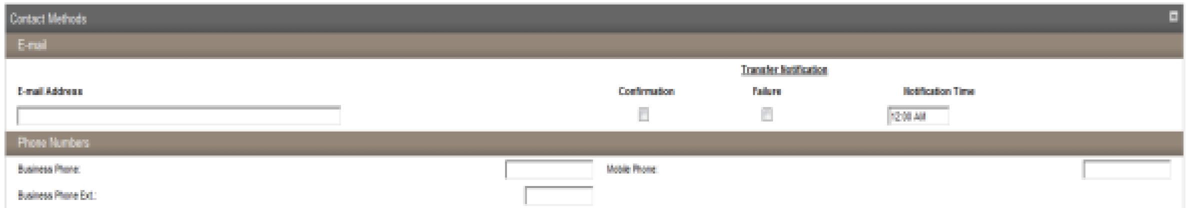
    a. 


5) Be sure to complete the following fields within the New Employee Using Existing Employee screen and then click on the next button at the bottom of the screen.

    a. Codes

i. 


b. Contact methods
   i. E-Mail Address
   ii. Phone Numbers




c. Security
   i. User Code, be sure to click the change password link to setup a password for the first time login of this new employee.
   ii. PIN


d. If you are copying the user from an ACH user be sure to change the token status to None and the Go3 is the Token type selected.

i. 


e. Administration
   i. Select the appropriate user administration options, only Client administrators should be setup to create, change, or delete employees.

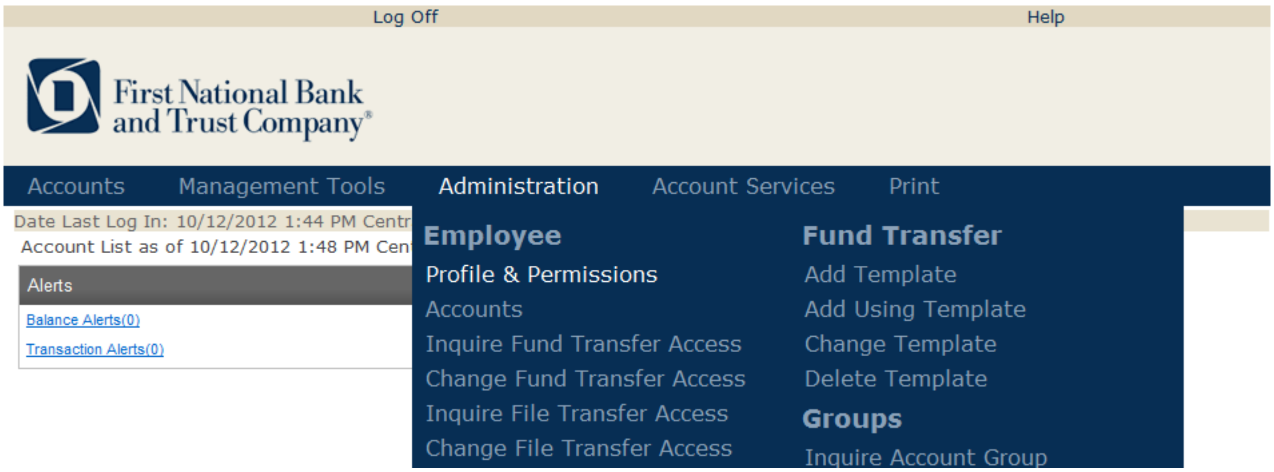

f. Corporate User Account Access
   i. Select the accounts that the new user will be allowed to access.


g. Applications Enabled
   i. Be sure to unselect the ACH option as all ACH users are managed locally by the First National Bank and Trust customer support team.


6) Click Done on the Accounts Added Verification Screen. You have now completed the 'add new employee' using the existing employee wizard and can provide the user code and new password to the employee.

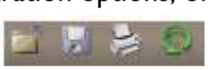
## Change Employee

1) Login to FirstB2B System.
   a. 


2) Mouse over the Administration menu and scroll down to click on Profile & Permissions.
   a. 


3) Click on the option "Change Employee", and then enter the employee name or user code and click on the submit button. If you elect not to enter the user name or user code and just click submit the screen will return all employees setup for your organization.
   a. 

4) Select the employee that you will be editing.
   a. 

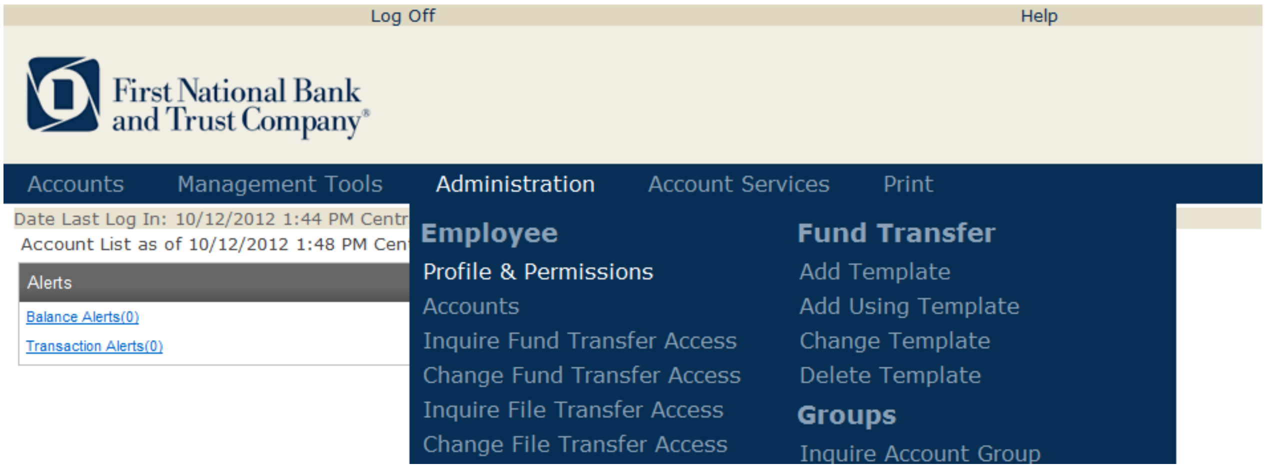

5) Edit the information within the change user screen that needs updating and then click on the save button in the top left corner of the screen. The most common edits will be to the accounts that the user has access, the administration options, or the documents that the user can view.
   a. 

## Change Employee Password

1) Login to FirstB2B System.

a. 


2) Mouse over the Administration menu and scroll down to click on Profile & Permission.

a. 


3) Click on the option “Change Employee”, and then click on the submit button.

a. 

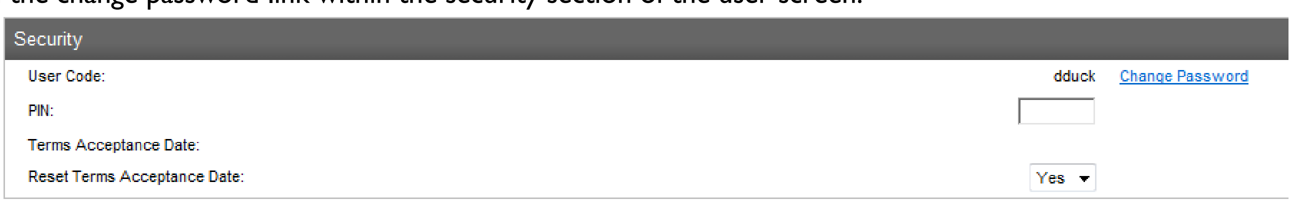
4) Select the employee that you will be resetting the password for.

a. 

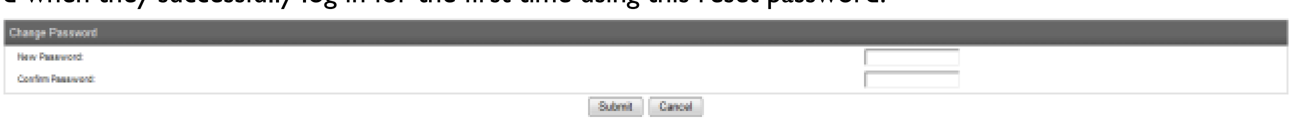
Employee List

| Name | Client Name |
|---|---|
| BETTY SUE | Test Customer |
| Donald Duck | Test Customer |
| James Customer | Test Customer |
| Mickey Mouse | Test Customer |

5) Click on the change password link within the security section of the user screen.

a. 


6) Enter and confirm a new password for the user and then click submit. They will be prompted to change this password when they successfully log in for the first time using this reset password.

a. 


7) Lastly, click the save button in the top left corner of the change user screen.

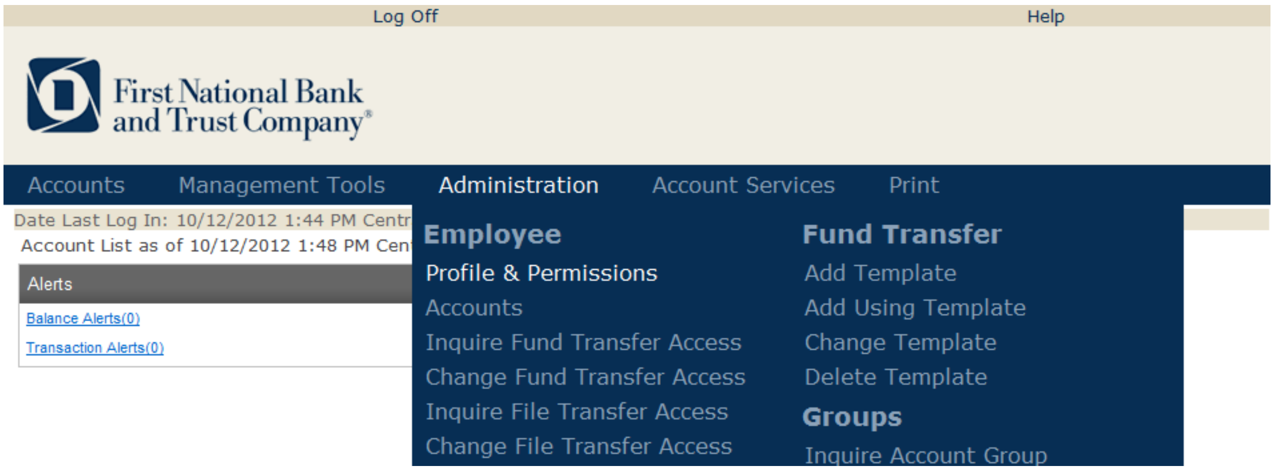
a. 

## Delete Employee

1) Login to FirstB2B System.

    a. 


2) Mouse over the Administration menu and scroll down to click on Profile & Permissions.

    a. 


3) Click on the option "Delete Employee", and then click the submit button.

    a. 

4) Select the employee that you will be deleting.

    a. 


5) If the employee is deleted had access to ACH you will see the ACH user screen with your company's internal accounts listed. Click on the next button.

    a. 

6) Click the black X in the top left corner of the screen to finalize. If the employee did have ACH and you saw the screen in step #5 you will need to instead click on the Finish button near the bottom of the record.

    a. 

## New Wire Transfer Template

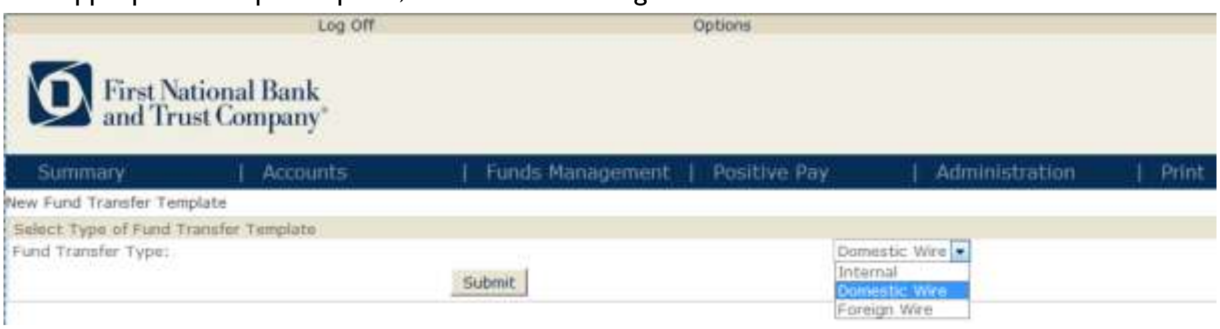
1) Login to FirstB2B System.

   a. 

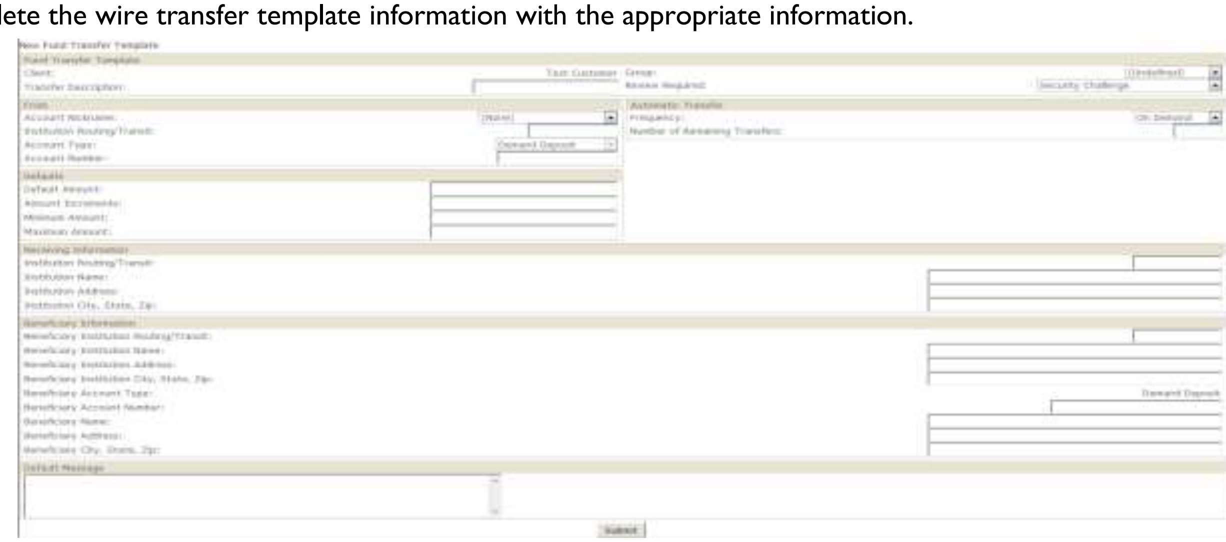

2) Mouse over the Administration menu and scroll down to click on Fund Transfer Add Template.

   a. 


3) Click on the appropriate template option, Domestic or Foreign and then click on the submit button

   a. 


4) Complete the wire transfer template information with the appropriate information.

   a. 

5) When all the information has been completed click on the submit button near the bottom of the screen.