

HomeTrust Bank
FOR BUSINESS



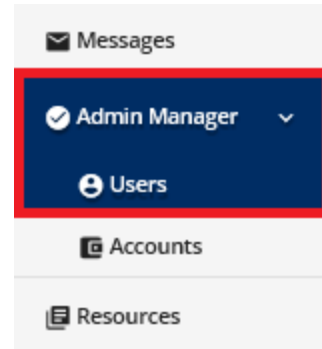
ADMIN MANAGER for BUSINESS CENTER

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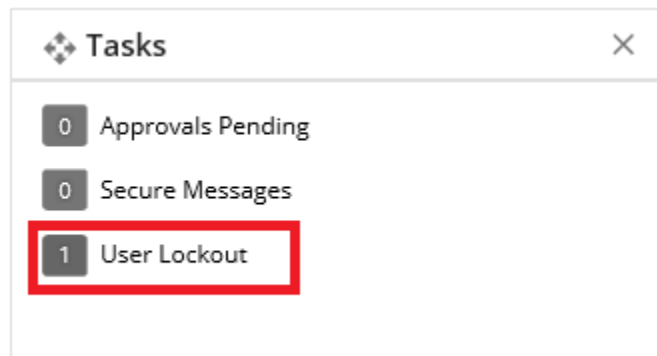
Admin Manager

Select **Admin Manager** and then **Users** from the menu to the left to add, manage or delete users for your company



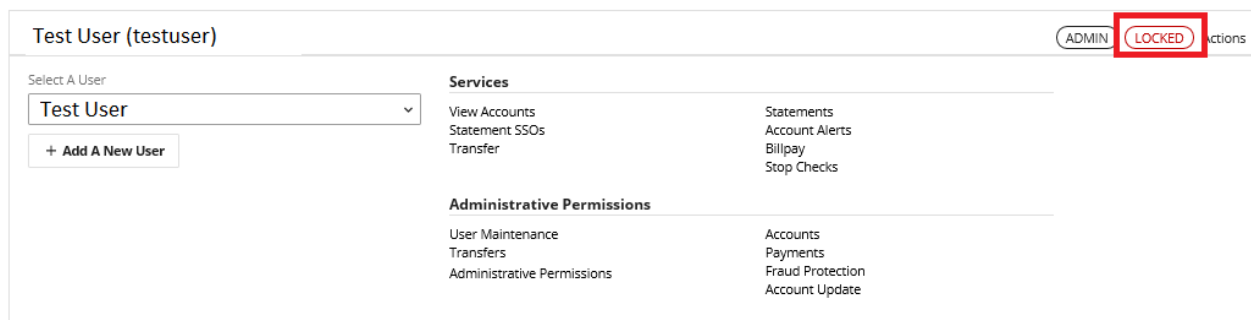
Unlocking a User

Company administrators can unlock users who have locked themselves out. You can see if a user has locked themselves out by viewing the Tasks Center on the Home page. Click on User Lockout or select **Admin Manager** and then **Users** from the menu to the left

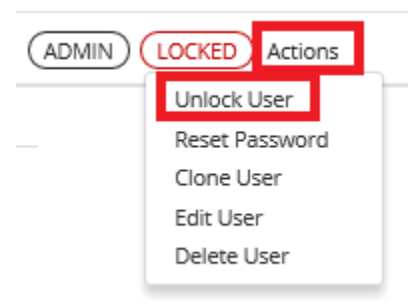


This will take you to the user maintenance page. The user will have the word LOCKED in red to the right of their name

Admin Manager - companyID

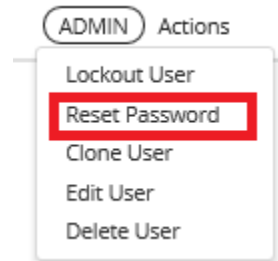


To unlock the user, select **Actions** to the right of the user name and then select **Unlock User**

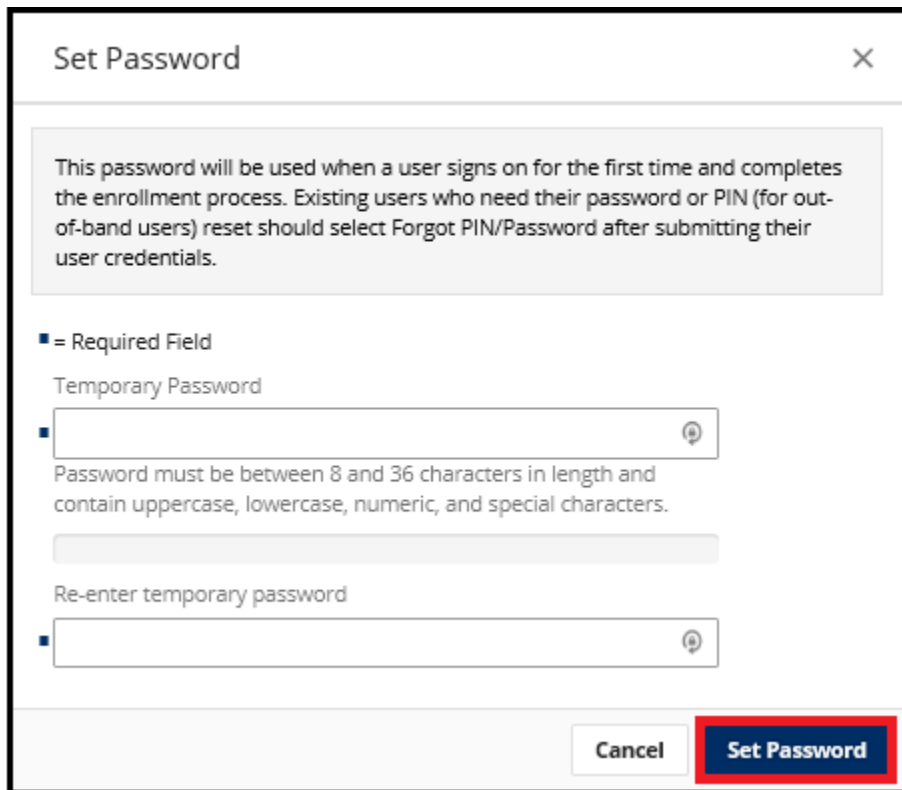


Password Reset

Select **Admin Manager** and then **Users** from the menu to the left. From the Users menu, select the user from the drop down. Reset the user's password by selecting **Reset Password** from the Actions menu



Enter a temporary password in the Temporary Password field and repeat the password in the Re-enter Temporary Password field and select **Set Password**

A screenshot of a 'Set Password' dialog box. The title bar says 'Set Password' with a close button (X) on the right. Below the title bar is a light gray box containing the following text: 'This password will be used when a user signs on for the first time and completes the enrollment process. Existing users who need their password or PIN (for out-of-band users) reset should select Forgot PIN/Password after submitting their user credentials.' Below this text is a legend: '■ = Required Field'. There are two input fields, both marked with a small blue square icon indicating they are required. The first field is labeled 'Temporary Password' and has a password icon (eye with slash) on the right. Below it is a note: 'Password must be between 8 and 36 characters in length and contain uppercase, lowercase, numeric, and special characters.' The second field is labeled 'Re-enter temporary password' and also has a password icon. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Set Password'. The 'Set Password' button is highlighted with a red border.

Reminder: Your password is case sensitive, must be between 8 and 36 characters in length and contain uppercase, lowercase, numeric and special characters

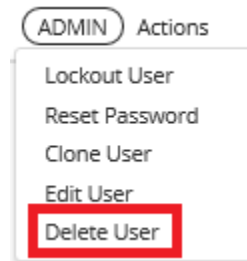
Deleting a user

Select **Admin Manager** and then **Users** from the menu to the left. From the Users menu, select the user from the drop down

Select A User

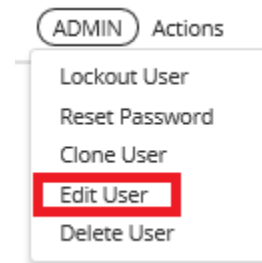
Test User

Click on the Actions menu then select **Delete User**



Updating User Information

Select **Admin Manager** and then **Users** from the menu to the left. From the Users menu, select the user from the drop down. From the Actions menu, select **Edit User**



Update any of the open fields as needed. Once you have finished, select **Save**

The screenshot shows the 'Edit User' form with the following sections and fields:

- User Information:**
 - Company ID
 - User ID
 - First Name:
 - Last Name:
 - Email: (highlighted with a red box)
 - Time Zone:
 - Business Phone Number: (highlighted with a red box)
 - Software Activation Key: with a **Reset** button
 - Remaining Uses: 3
 - Expires: May 4, 2019 10:41 AM EDT
 - Enable text message notifications
- Contact Information:**
 - Street Address:
 - City:
 - State:
 - Zip Code:
 - Country:
- Security:**
 - What is your city of birth?
 - What is your mother's middle name?
- Administrator Actions:**
 - Enable Date:
 - Admin?

At the bottom right, there are **Cancel** and **Save** buttons, with the **Save** button highlighted by a red box.

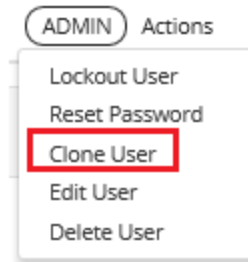
Creating a New User

Select **Admin Manager** and then **Users** from the menu to the left. To create a new user you can select **Add New User**

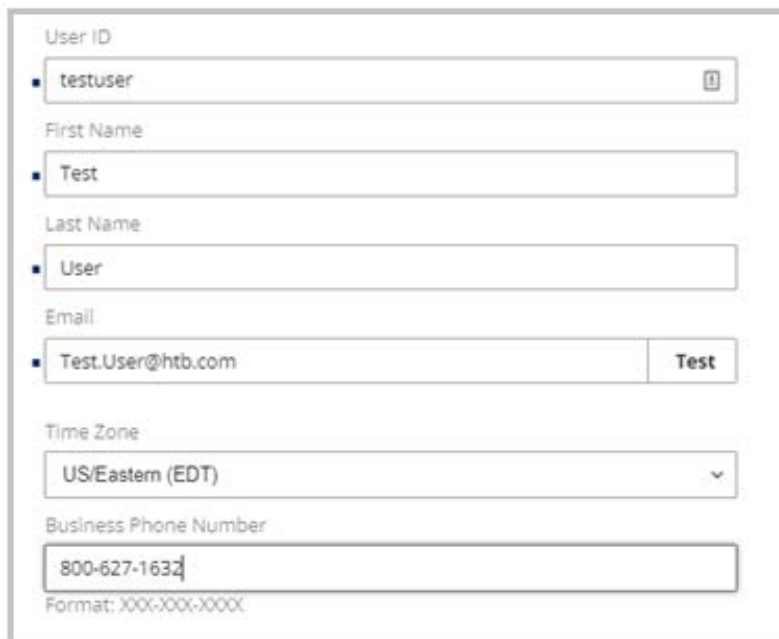
The screenshot shows the 'Test User (testuser)' form with the following elements:

- Section title: **Test User (testuser)**
- Label: **Select A User**
- Dropdown menu:
- Button: **+ Add A New User** (highlighted with a red box)

To add a new user with the same permissions, select **Clone User** from the Actions menu



Complete the required fields on the User Information page: *User ID*, *First Name*, *Last Name*, *Email* and *Business Phone Number*



A screenshot of a 'User Information' form. The form contains several input fields, each with a small square icon to its left. The fields are: 'User ID' with the value 'testuser'; 'First Name' with the value 'Test'; 'Last Name' with the value 'User'; 'Email' with the value 'Test.User@htb.com' and a 'Test' button to its right; 'Time Zone' with a dropdown menu showing 'US/Eastern (EDT)'; and 'Business Phone Number' with the value '800-627-1632'. Below the phone number field, the text 'Format: XXX-XXX-XXXX' is displayed.

The company address information should prefill

Contact Information
Street Address
<input type="text" value="10 Woodfin St"/>
City
<input type="text" value="ASHEVILLE"/>
State
<input type="text" value="NC"/>
Zip Code
<input type="text" value="28801"/>
Country
<input type="text" value="United States"/>

Complete the Security Information. This is used to identify a user that calls the Customer Care Center for assistance


Security
■ = Required Field
What is your city of birth?
■ <input type="text"/>
What is your mother's middle name?
■ <input type="text"/>

Complete the Administrator Actions by providing a temporary password for the user. If the user can *add, edit and maintain other users*, select **Admin**. Once page is complete, select Save


Administrator Actions

■ = Required Field

Enable Date


■ 04/12/2019 

Temporary Password

■ 

Password must be between 8 and 36 characters in length and contain uppercase, lowercase, numeric, and special characters.

Re-enter temporary password

■ 

Admin?

User Services

To enable and edit account permissions for users, select **Admin Manager** and then **Users** from the menu to the left.

Test User (testuser)
ADMIN Actions

Select A User

Test User

+ Add A New User

Services

View Accounts	Statements
Mobile Deposits	Account Alerts
Statement SSOs	Stop Checks
Additional Access	

Administrative Permissions

User Maintenance	Additional Access
Account Update	

Last Login: Apr 6, 2019 8:41:04 AM

Test User (testuser)
ADMIN Actions

Accounts	Transfers	Fraud Protection	Additional Access	Additional Services	Administrative Permissions	Statements			
			View Access		Account Alerts		eStatements		
			ON	OFF	ON	OFF	ON	OFF	
			ON	OFF	OFF	OFF	OFF	OFF	
			ON	OFF	ON	OFF	ON	OFF	

Accounts: enable accounts for which a user can view, receive alerts and view eStatements

Test User (testuser)
ADMIN Actions

Accounts	Transfers	Fraud Protection	Additional Access	Additional Services	Administrative Permissions	Statements			
			View Access		Account Alerts		eStatements		
			ON	OFF	ON	OFF	ON	OFF	
			ON	OFF	OFF	OFF	OFF	OFF	
			ON	OFF	ON	OFF	ON	OFF	

Transfers: enable if a user can transfer funds between HomeTrust Bank accounts. Select which accounts a user can transfer between, if they require approval from another user for every transfer and if they can approve the transfers initiated by other users

Test User (testuser) ADMIN Actions

Accounts	Transfers	Fraud Protection	Additional Access	Additional Services	Administrative Permissions	Statements
<input checked="" type="checkbox"/> Enable Transfer Money						
			Enable for Debit/Credit <input type="button" value="BOTH"/> <input type="button" value="NONE"/>	Approval Required for Debit <input type="button" value="ON"/> <input type="button" value="OFF"/>		Can Approve <input type="button" value="ON"/> <input type="button" value="OFF"/>
Accounts						
Checking (*1234)	<input type="button" value="Both"/> <input type="button" value="Debit"/> <input type="button" value="Credit"/> <input type="button" value="None"/>					<input type="button" value="ON"/> <input type="button" value="OFF"/>
Checking (*7890)	<input type="button" value="Both"/> <input type="button" value="Debit"/> <input type="button" value="Credit"/> <input type="button" value="None"/>					<input type="button" value="ON"/> <input type="button" value="OFF"/>

Fraud Protection: enable accounts that the user may place stop payments on

Test User (testuser) ADMIN Actions

Accounts	Transfers	Fraud Protection	Additional Access	Additional Services	Administrative Permissions	Statements
Stop Checks <input type="button" value="ON"/> <input type="button" value="OFF"/>						
Account						
Checking (*1234)						<input type="button" value="ON"/> <input type="button" value="OFF"/>

Additional Access: use this section to enable a user for eStatements and Bill Pay (if you have the service) if needed

Test User (testuser) ADMIN Actions

Accounts	Transfers	Fraud Protection	Additional Access	Additional Services	Administrative Permissions	Statements
<input checked="" type="checkbox"/> eStatements <input checked="" type="checkbox"/> Bill Pay						

Additional Services: use this section to enable the user access to the HomeTrust Bank Business Mobile Banking App

Test User (testuser) ADMIN Actions

Accounts	Transfers	Fraud Protection	Additional Access	Additional Services	Administrative Permissions	Statements	
Enable Banking App					<input checked="" type="checkbox"/>		

Administrative Permissions: use this section to enable the administrative authority to a user. With this permission enabled, the user can view, edit, create and delete other users

Test User (testuser) ADMIN Actions

Accounts	Transfers	Fraud Protection	Additional Access	Additional Services	Administrative Permissions	Statements	
User / Company Maintenance							
Enable Administer Users					<input checked="" type="checkbox"/>		
Transactional Services							
Can Enable Transfers					<input type="checkbox"/>	OFF	
Can Enable Stops					<input type="checkbox"/>	OFF	
Can Enable Mobile Deposits					<input type="checkbox"/>	OFF	
Administrative Services							
Can Enable Accounts					<input type="checkbox"/>	OFF	
Can Enable Additional Access					<input checked="" type="checkbox"/>		
Can Enable Administrative Permissions					<input type="checkbox"/>	OFF	
Can Update Accounts					<input checked="" type="checkbox"/>		

Once the user settings have been completed, select **Save**