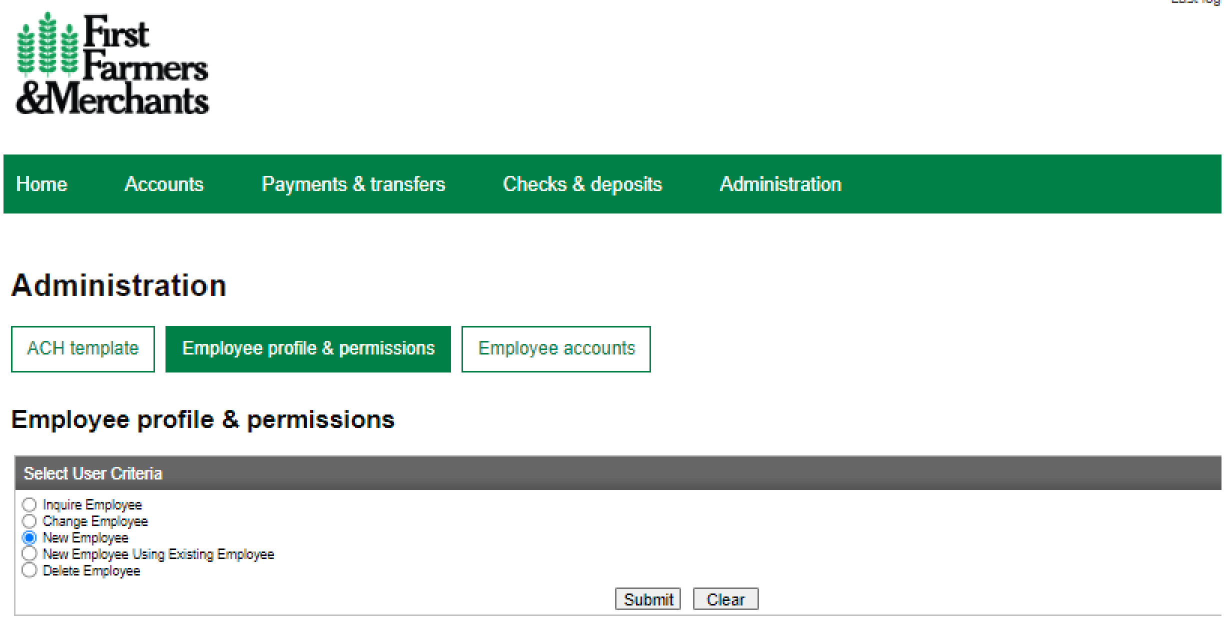
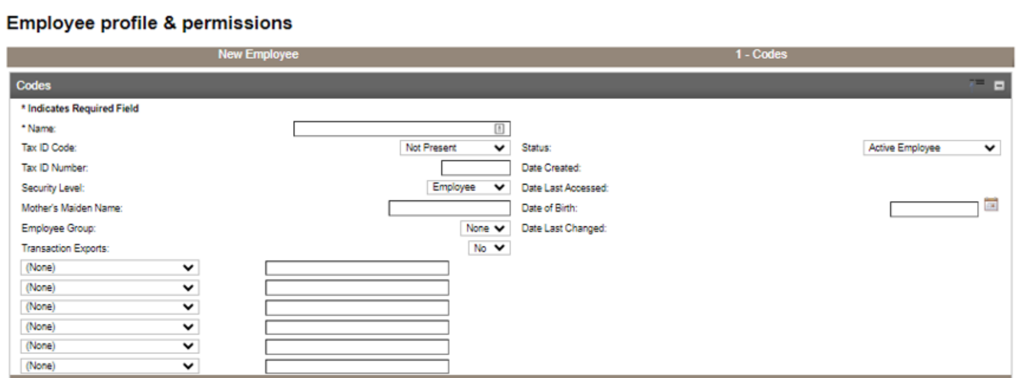
# Adding a New Enhanced e-Corp Employee

Log in to e-Corp and go to Administration > Employee profile & permissions

Click the radio button next to New Employee. If you already have an employee set up, and want to copy their permissions, click the radio button next to New Employee Using Existing Employee.




Below is a summary of each section of the employee setup. Each screen shot is for required fields. If the field name is not mentioned below, it is not required or the default setting will be used.




Name – Enter the employee Name
Security Level – enter the appropriate security level for this employee

a. **Employee** – Has no access to client administration

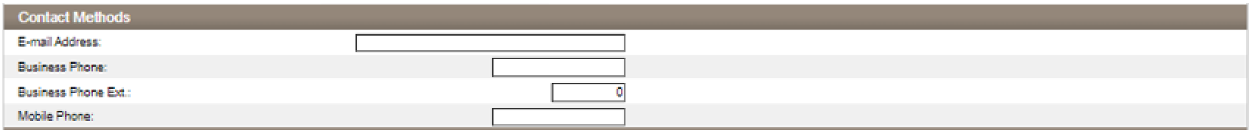
b. **Supervisor** – Has access to client administration but can only maintenance employees in their own employee display group

c. **Administrator** – Has access to client administration and can maintenance any employee or supervisor

Employee Group – This is an optional field. Employee groups are used to group employees. An example could be “secretaries”; “loan assistants”; “management”, etc. This field can be anything the client wants, and can be set up at any time.

Transaction Exports - If set to “Yes”, this employee will have the ability to export transactions into a financial program, such as Quickbooks

E-Mail Address Long – Enter the employee’s business or personal email address



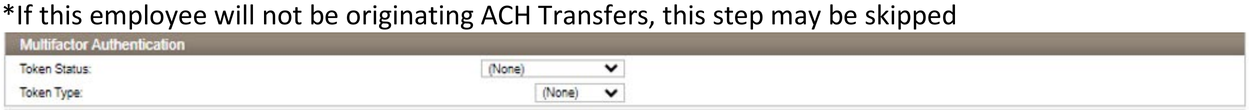

E-Mail Address – Enter the employee’s business or personal email address

Business Phone – Enter the employee’s business phone number

Access ID – Enter the Access ID the employee will use to log in to e-Corp. The user code needs to be between six and fifteen characters long and can be alpha, numeric or a combination.

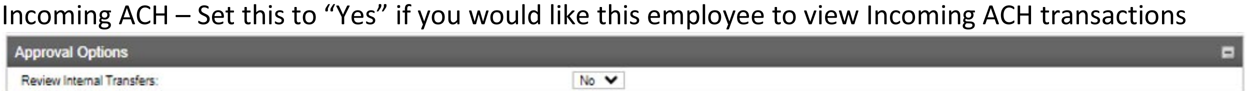

Change Password – Enter a temporary password that the employee will be prompted to change the first time they log in. Passwords must be 12-17 characters in length, and require one upper case letter, one lower case letter, one number and one special character such as !$*.

Token Status – Set to “Pending Enablement”. You will need to notify your Business Banker that you have set up a new employee. The token number will be entered by the bank, and the token will be sent to the employee. The first time they log in they will be asked to setup the token.
*If this employee will not be originating ACH Transfers, this step may be skipped



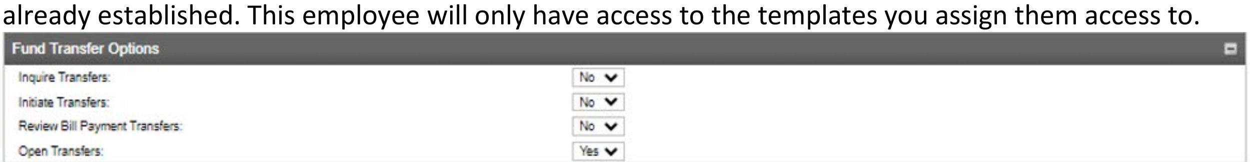

Role Name – select the appropriate role for this employee


Incoming ACH – Set this to “Yes” if you would like this employee to view Incoming ACH transactions



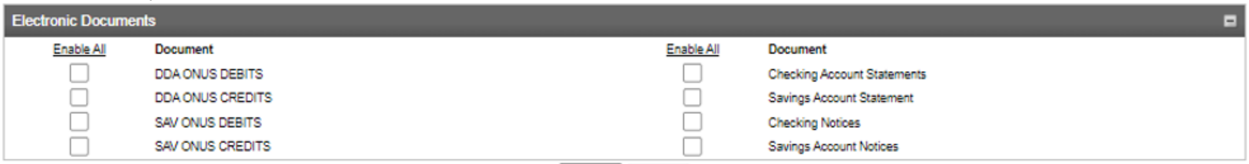

If any of these fields are set to Yes, that type of transaction initiated by this employee would require additional approval before that transaction is finalized.

Inquire Transfers – If set to Yes, this employee will have the ability to inquire fund transfer templates already established. This employee will only have access to the templates you assign them access to.



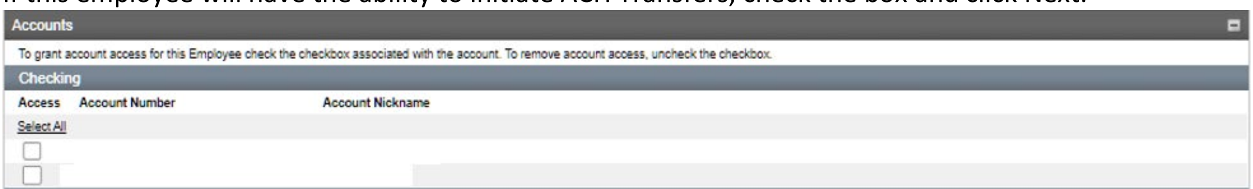
Initiate Transfers - If set to yes, this employee will have the ability to initiate fund transfers.


Select the documents you would like this employee to view through e-Corp. If you enrolled in e-Statements you would want to select the first 8 check boxes.


Electronic Documents

| Enable All | Document | Enable All | Document |
|---|---|---|---|
| ☐ | DDA ONUS DEBITS | ☐ | Checking Account Statements |
| ☐ | DDA ONUS CREDITS | ☐ | Savings Account Statement |
| ☐ | SAV ONUS DEBITS | ☐ | Checking Notices |
| ☐ | SAV ONUS CREDITS | ☐ | Savings Account Notices |

Select the accounts that you would like this employee to have access to.
If this employee will have the ability to initiate ACH Transfers, check the box and click Next.


Accounts

To grant account access for this Employee check the checkbox associated with the account. To remove account access, uncheck the checkbox.

Checking

| Access | Account Number | Account Nickname |
|---|---|---|
| Select All | | |
| ☐ | | |
| ☐ | | |

On the next screen click Finish.



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