

# How do I give someone access to my online account (business platform)?

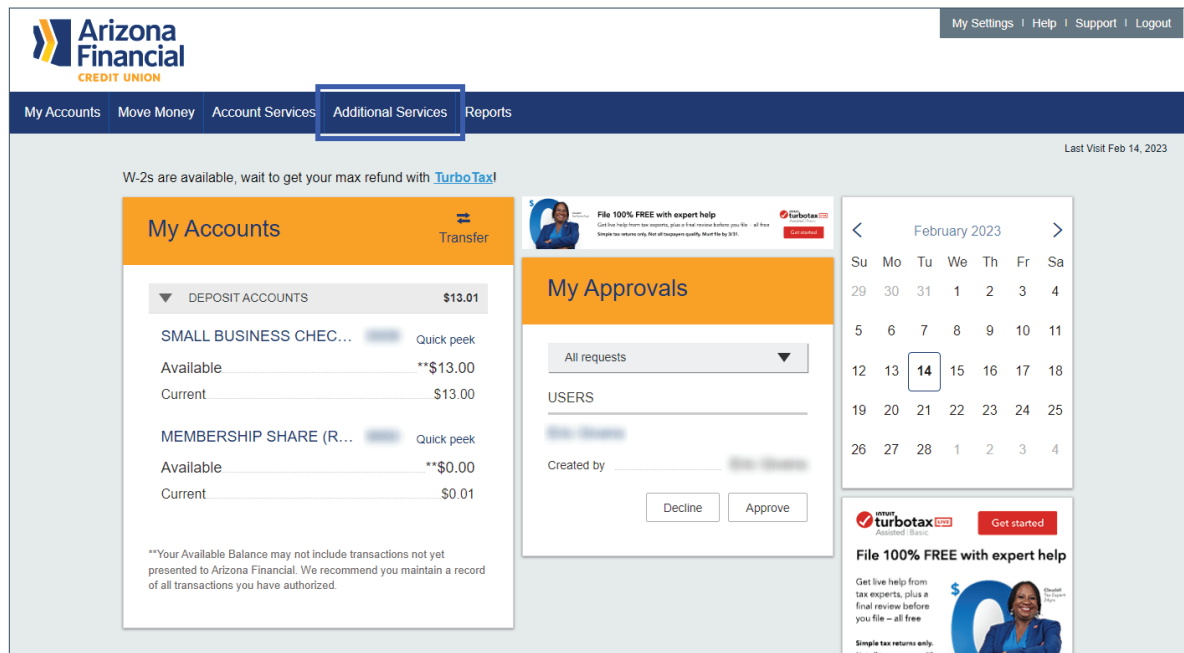


We're excited to assist you with accessing your accounts through online banking and our mobile banking apps. We know switching to a new platform can be a bit of a learning curve, so we're providing this step-by-step guide to help you get up and running as quickly as possible.

**We're here to help!** If you have any questions, please stop by your local branch, give us a call at **602-683-1724** or send an email to [MemberSupport@azfcu.org](mailto:MemberSupport@azfcu.org).

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Log in to your **Business Online Banking** account and click on the **Additional Services** tab.

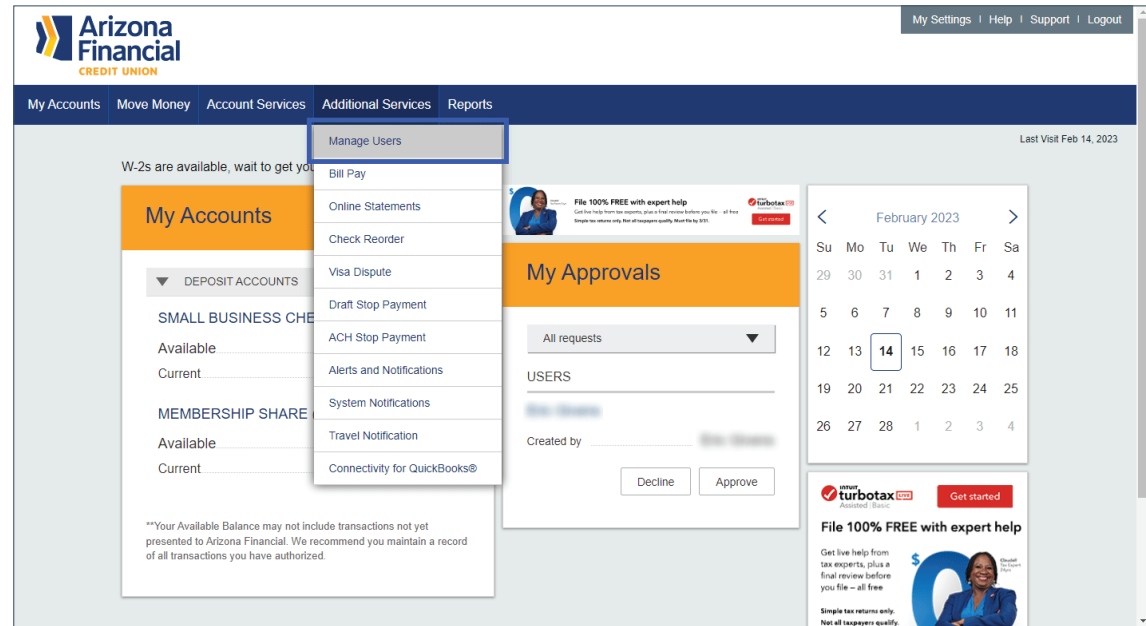


The screenshot shows the Arizona Financial Business Online Banking interface. The top navigation bar includes "My Accounts", "Move Money", "Account Services", "Additional Services" (highlighted with a blue box), and "Reports". The main content area is divided into several sections:

- My Accounts:** A section with a "Transfer" button. It lists "DEPOSIT ACCOUNTS" with a total balance of \$13.01. Underneath, there are two account types: "SMALL BUSINESS CHECKING" with an available balance of \$13.00 and a current balance of \$13.00, and "MEMBERSHIP SHARE (R...)" with an available balance of \$0.00 and a current balance of \$0.01. A disclaimer at the bottom states: "\*\*\*Your Available Balance may not include transactions not yet presented to Arizona Financial. We recommend you maintain a record of all transactions you have authorized."
- My Approvals:** A section with a dropdown menu for "All requests" and a "USERS" list. Below the list, there is a "Created by" field and two buttons: "Decline" and "Approve".
- Calendar:** A calendar for February 2023, with the 14th highlighted.
- TurboTax:** A promotional banner for TurboTax, stating "File 100% FREE with expert help" and "Get started".

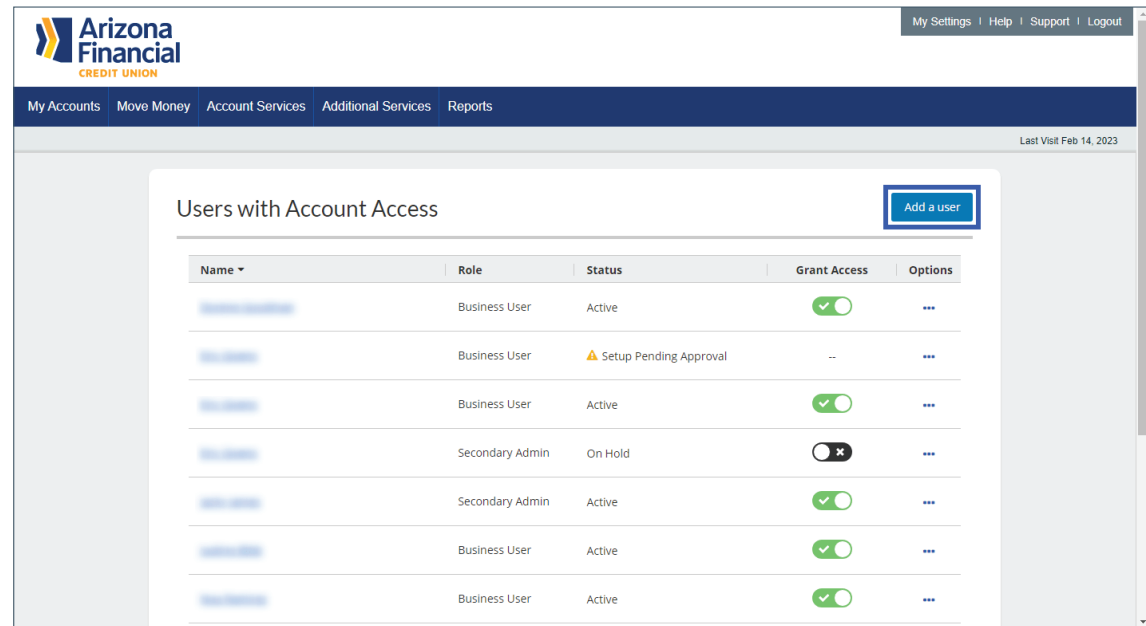
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Click **Manage Users**.



3

This screen will allow you to edit existing users or add additional users. Click the **Add a User** button to get started.



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Enter the personal information of the user being added.

Arizona Financial CREDIT UNION

My Settings | Help | Support | Logout

My Accounts | Move Money | Account Services | Additional Services | Reports

Last Visit Feb 14, 2023

### Manage User Details and Access Settings

#### User Details

First Name\* Middle Name (Optional) Last Name\*

Phone Number\* Email\*

(000) xxx-xxxx

#### User Access Settings

Modify account specific access Select user to clone

Select a Tax ID

Arizona Federal Biz Banking T... 1 of 1

Select all for this Tax ID

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If you would like to copy the settings from another user, click the **Select User to Clone** button ...

### User Access Settings

Modify account specific access Select user to clone

Select a Tax ID

Arizona Federal Biz Banking T... 1 of 1

Select all for this Tax ID

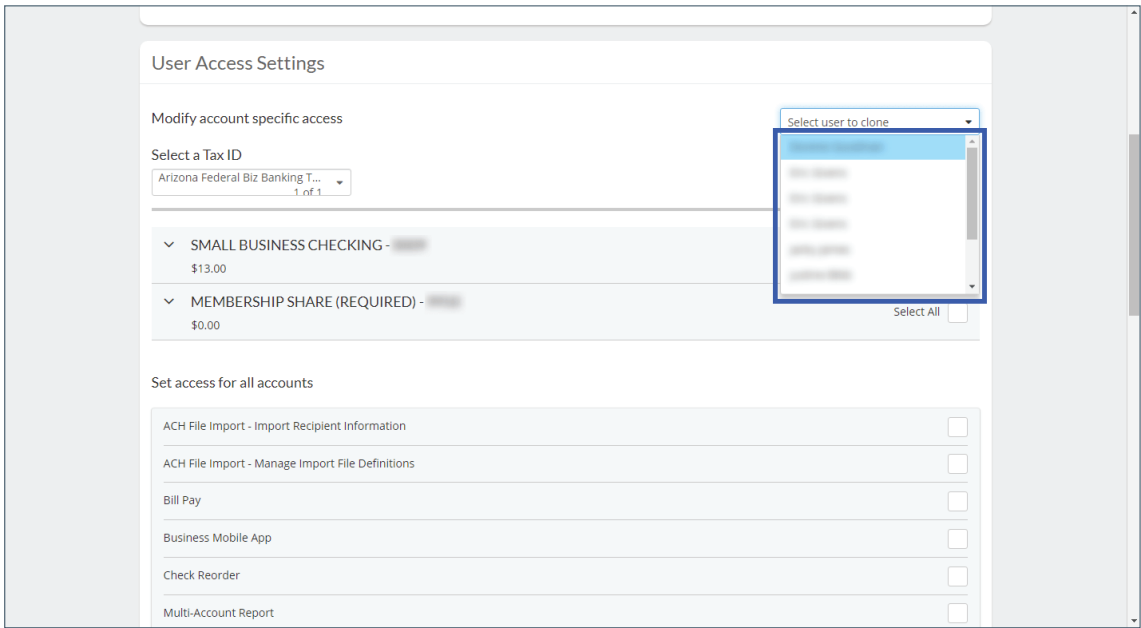
- SMALL BUSINESS CHECKING - \$13.00 Select All
- MEMBERSHIP SHARE (REQUIRED) - \$0.00 Select All

#### Set access for all accounts

- ACH File Import - Import Recipient Information
- ACH File Import - Manage Import File Definitions
- Bill Pay
- Business Mobile App
- Check Reorder
- Multi-Account Report

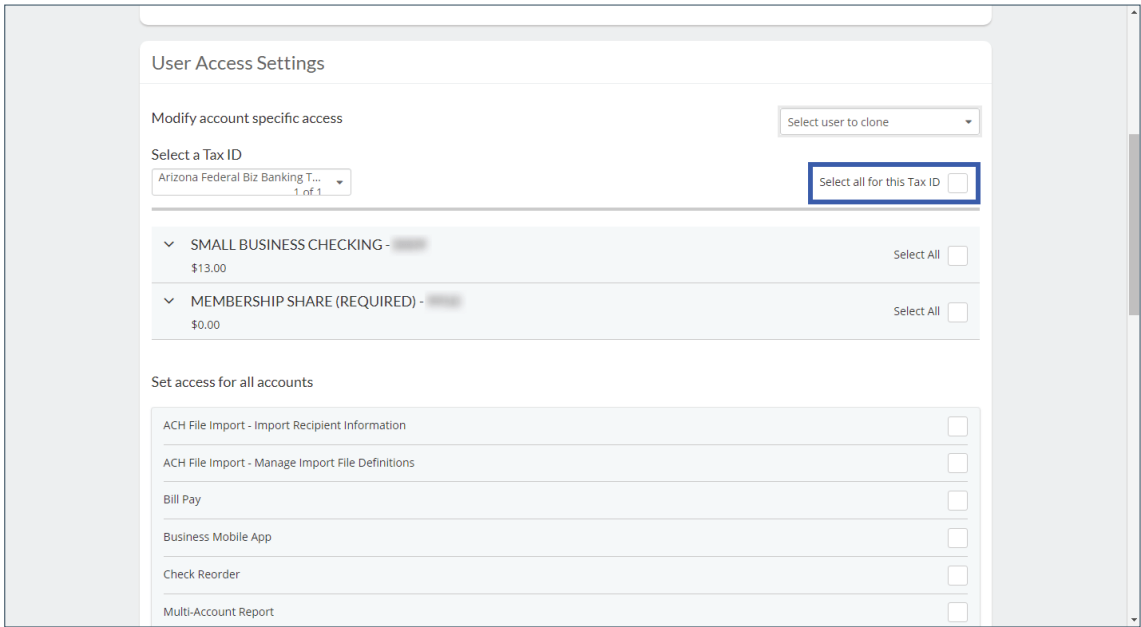
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... select the user.



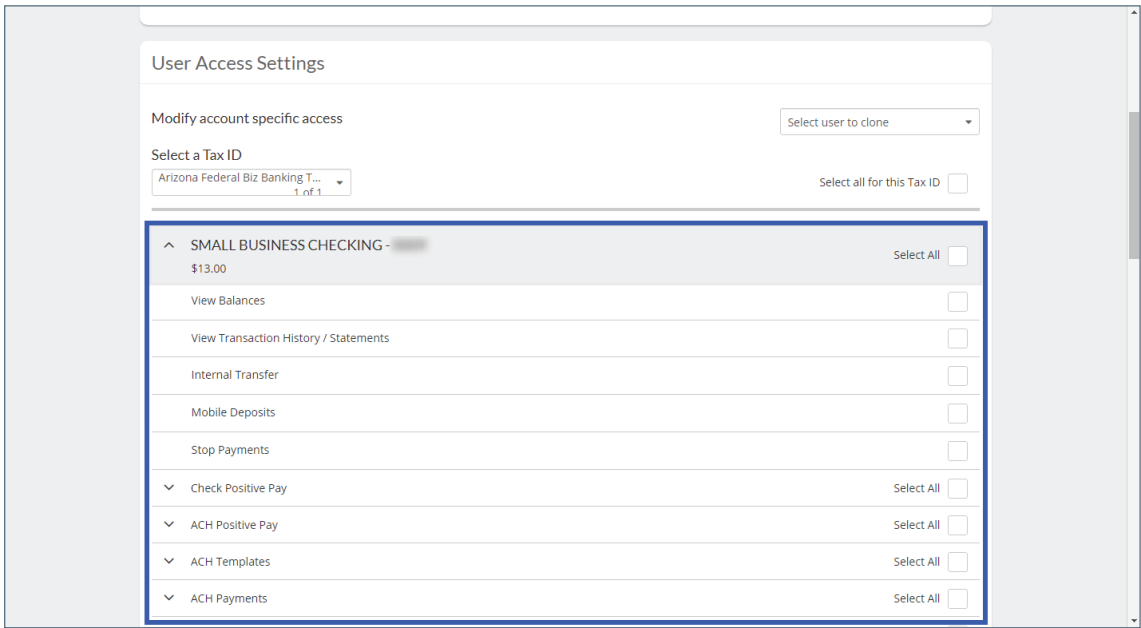
7

If you do not wish to copy the settings from another user, you can either click the **Select all for this Tax ID** box to give all permissions to the user ...



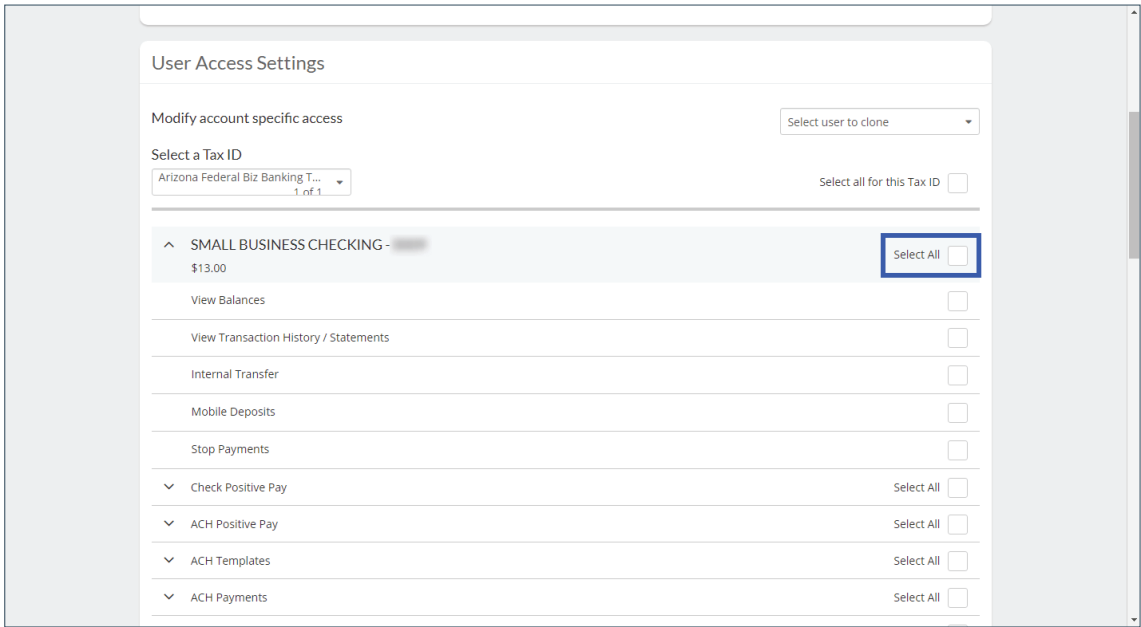
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... or you can select a specific account and set permissions to the different tools and features in each account.



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You can also click the **Select All** box to the right of the account name if you'd like to give all permissions to this specific account.



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The options listed under **Set access for all accounts** apply to all accounts linked under your username and password. **Note:** These options can't be limited per share or loan.

Set access for all accounts

ACH File Import - Import Recipient Information	<input type="checkbox"/>
ACH File Import - Manage Import File Definitions	<input type="checkbox"/>
Bill Pay	<input type="checkbox"/>
Business Mobile App	<input type="checkbox"/>
Check Reorder	<input type="checkbox"/>
Multi-Account Report	<input type="checkbox"/>
Online Statements	<input type="checkbox"/>
Payments Reports	<input type="checkbox"/>

Set transaction limits for all accounts ⓘ

ACH Payments Creation Limits	Apply Company Limits <input type="checkbox"/>
ACH Collections Creation Limits	Apply Company Limits <input type="checkbox"/>
ACH Pass-Through Creation Limits	Apply Company Limits <input type="checkbox"/>
Domestic Wire Transfer Payments Creation Limits	Apply Company Limits <input type="checkbox"/>

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Select the options you would like the user to have access to by clicking on the box in line with the desired permission.

Set access for all accounts

ACH File Import - Import Recipient Information	<input type="checkbox"/>
ACH File Import - Manage Import File Definitions	<input type="checkbox"/>
Bill Pay	<input type="checkbox"/>
Business Mobile App	<input type="checkbox"/>
Check Reorder	<input type="checkbox"/>
Multi-Account Report	<input type="checkbox"/>
Online Statements	<input type="checkbox"/>
Payments Reports	<input type="checkbox"/>

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ACH Collections Creation Limits	Apply Company Limits <input type="checkbox"/>
ACH Pass-Through Creation Limits	Apply Company Limits <input type="checkbox"/>
Domestic Wire Transfer Payments Creation Limits	Apply Company Limits <input type="checkbox"/>

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The options listed under **Set transaction limits for all accounts** apply the default maximum limits allowed, or define individual maximum transaction limits for the user. **Note:** These limits cannot exceed the maximum set by the bank.

Multi-Account Report

Online Statements

Payments Reports

Set transaction limits for all accounts ⓘ

- ACH Payments Creation Limits  Apply Company Limits
- ACH Collections Creation Limits  Apply Company Limits
- ACH Pass-Through Creation Limits  Apply Company Limits
- Domestic Wire Transfer Payments Creation Limits  Apply Company Limits
- Transaction Approval Limits  Apply Company Limits

Set approval thresholds for all accounts ⓘ

- Transaction Approval Thresholds  Apply Company Thresholds

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The options listed under **Set approval thresholds for all accounts** apply the default maximum threshold allowed, or define individual maximum transaction thresholds for the user. **Note:** These thresholds cannot exceed the maximum set by the bank.


Transaction Approval Thresholds  Apply Company Thresholds

Set ACH transaction types for all accounts ⓘ

- ACH Payments Type  Select All
- ACH Collections Type  Select All

ⓘ Please entitle services for at least one account before saving.

Save Cancel



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If you have accounts enabled to make ACH Payments and ACH Collections, you must select at least one transaction type for ACH Payment Type and ACH Collections Type.

Set approval thresholds for all accounts ⓘ

Transaction Approval Thresholds Apply Company Thresholds


Set ACH transaction types for all accounts ⓘ

ACH Payments Type Select All

ACH Collections Type Select All

ⓘ Please entitle services for at least one account before saving.

Save Cancel

 OPPORTUNITY

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Click **Save** once you are finished.

Set approval thresholds for all accounts ⓘ

Transaction Approval Thresholds Apply Company Thresholds


Set ACH transaction types for all accounts ⓘ

ACH Payments Type Select All

ACH Collections Type Select All

ⓘ Please entitle services for at least one account before saving.

Save Cancel

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That's it! Another administrator on the account must approve access for the user. If there are no additional administrators, selecting save will approve access for the user.

Arizona Financial CREDIT UNION

My Accounts | Move Money | Account Services | Additional Services | Reports

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Users with Account Access [Add a user](#)

Name	Role	Status	Grant Access	Options
[Redacted]	Business User	⚠ Setup Pending Approval	--	⋮
[Redacted]	Business User	Active	<input checked="" type="checkbox"/>	⋮
[Redacted]	Business User	⚠ Setup Pending Approval	--	⋮
[Redacted]	Business User	Active	<input checked="" type="checkbox"/>	⋮
[Redacted]	Secondary Admin	On Hold	<input type="checkbox"/>	⋮
[Redacted]	Secondary Admin	Active	<input checked="" type="checkbox"/>	⋮
[Redacted]	Business User	Active	<input checked="" type="checkbox"/>	⋮

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Once approved, the user will receive two emails - one with a temporary username and one with a temporary password.

Arizona Financial CREDIT UNION

My Accounts | Move Money | Account Services | Additional Services | Reports

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[Redacted]	Business User	⚠ Setup Pending Approval	--	⋮
[Redacted]	Business User	Active	<input checked="" type="checkbox"/>	⋮
[Redacted]	Secondary Admin	On Hold	<input type="checkbox"/>	⋮
[Redacted]	Secondary Admin	Active	<input checked="" type="checkbox"/>	⋮
[Redacted]	Business User	Active	<input checked="" type="checkbox"/>	⋮