

eZBusiness Quick Start Guide



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Overview

This guide provides instructions for important common functions, including adding new cardholders, cardholder search, and cardholder maintenance.

The Quick Start Guide is a companion to the comprehensive **eZBusiness Company Administrator User Guide**.

If you have questions about eZBusiness, please contact MidFirst Commercial Services at 877-516-2777 or commercialservices@midfirst.com. Thank you for choosing MidFirst Bank for your company's spending needs!

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Logging In

To log into eZBusiness Card Management:

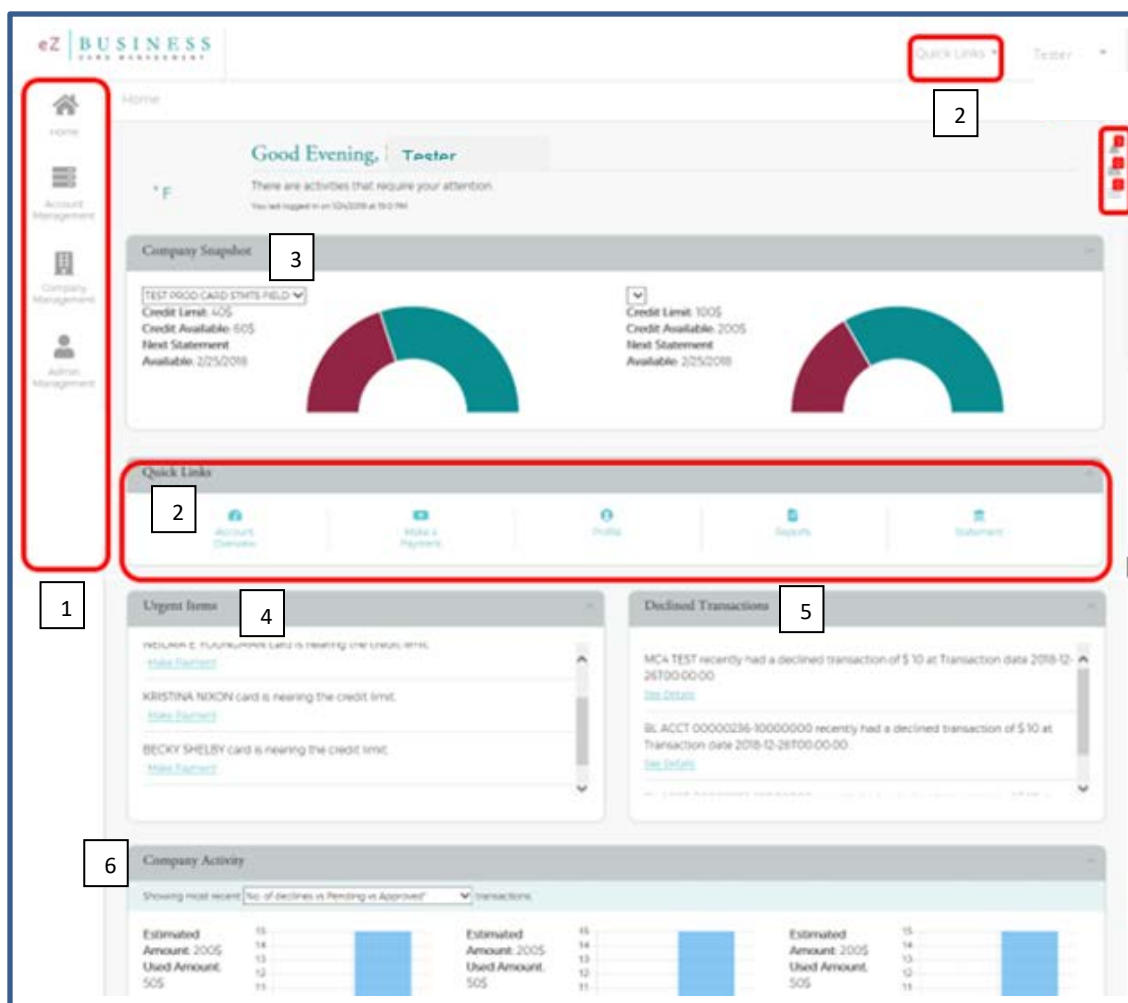
1. Navigate to Midfirst.com and select 'eZBusiness Company Admin' from the Log In dropdown Menu. Enter **Username**. As you begin typing your Username, the **Password** field displays. Enter your Password and click **Login**.

Please note: A 'Forgot Password' option is available to assist with login issues. If additional assistance is needed, please contact Commercial Services at 877-516-2777.



Home Page Overview

Important: Depending on your security settings, you may or may not see all options shown.



The **Home Page** is a dashboard intended to provide a quick overview of your company's card program, allowing easy access to key areas of the system as well as important activities (such as viewing declined transactions) to be aware of.

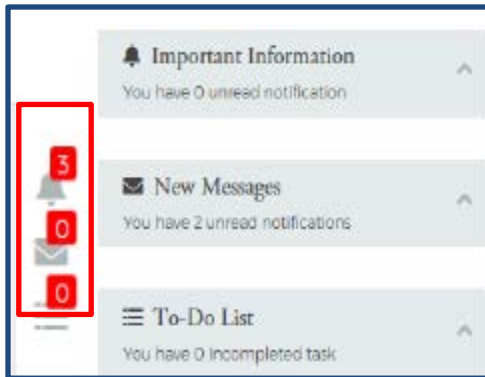
Elements appearing on the **Home** page:

1. **Side Navigation Bar:** Link to modules you have access to
2. **Links:** There are two options to access other functions from the home page
 - Drop-down function list at the top of the page
 - Quick Links section in the middle of the page
3. **Company Snapshot:** Provides a snapshot of company's card program status
4. **Urgent Items:** Provides information related to items that require immediate attention

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5. **Declined Transactions:** Provides information related to company users' declined transactions
6. **Activity:** Provides a snapshot of company activities

Three icons appear in the upper right-hand corner of the **Home Page**. Click any of the icons to expand.



Icon definitions:

- **Important Information:** Displays important information that requires action
- **Messages:** Displays if you have unread notifications
- **To-Do List:** Provides the ability to create a list of tasks to be completed

Add New Cardholder Account (Issue New Card)

Important

- Validate the hierarchy level selected if the card program has multiple hierarchy levels.
- Select the correct product for the new account if there are multiple card products in the program.
- This option should be used only when adding a new cardholder; not to replace a card for an existing cardholder.


1. From the **Home** page, click **Company Management > Search Company**

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2. Enter the search criteria and click **Search**. The **Company Search Results** page is displayed. Click the **Online Request** icon.


Company Search Results


Showing 10 Companies


System	Association	Corporation	Company	Company Name	Status	Actions
B2K	85	880001	00000132	00000132 COMPANY	Open	


3. From the **Online Requests** page, select **Add New Cardholder Request**.


Online Requests


 Add New Cardholder Request


 Add or Remove PIN Request


 Close Account Request


 Card Replacement Request


 Change Credit Limit

 Setup AutoPay

 View Full Account Number

 Order New Pin

 Manage Employee Id

 Card Activation Request

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4. The **Add New Cardholder** page is divided into multiple sections. Complete all required fields on the page, highlighted in yellow. Click **Submit**.

Add New Cardholder ⓘ English ▾

Master Account: 1 ▾

Product Details ^

☐ Pin Access Credit Limit: Credit Limit Type Processing: 50 - Corporate Accr ▾

☐ Allow Cash Advance Access ☐ Order Plastic Now

Cardholder Details ⓘ ^

Details

Prefix: Prefix First Name: First Name Middle Name: Middle Name
Last Name: Last Name Suffix: Suffix Employee ID: Employee ID
Employee Cost Center: Employee Cost Center SSN or Tax ID: SSN or Tax ID Mothers Maiden Name: Mother's Maiden Name
Date Of Birth: mm/dd/yyyy

Primary Address

Address Line 1: Address Line 1 Address Line 2: Address Line 2 Address Line 3: Address Line 3
City: City State: Zip Code: Zip Code
Foreign Address: ☐

Statement Address same as Primary Address ☐

Statement Address

Address Line 1: Address Line 1 Address Line 2: Address Line 2 Address Line 3: Address Line 3
City: City State: Zip Code: Zip Code
Foreign Address: ☐

Phone

Mobile Phone: Mobile Phone Business Phone: Business Phone Home Phone: Home Phone
Other Phone: Other Phone Other Phone Type: B-Business ▾

Rush Card Delivery ⓘ ^

Rush Card Details ☐

Auto Enrollment ⓘ ^

Auto Enrollment Details ☐

Memo ⓘ ^

Submit Cancel

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Note:

- Some toggles open additional fields once they are selected.
 - The **Home Phone** field should contain the best phone number to contact the cardholder (i.e. primary phone number). The cardholder's mobile phone number is recommended in the event a fraud alert is triggered while the cardholder is traveling and/or out of the office.
 - The **SSN or Tax ID** Field is required. It is permissible to enter five digits (example: 99999), then the last four digits of the cardholder's SSN. Both SSN (last four digits) and Date of Birth will be used to authenticate the cardholder when contacting Customer Service.
5. If applicable, enter questions or comments about the request in the **Memo** field and click **Submit**.

A screenshot of a web form field labeled "Memo". The field has a light gray header bar with the word "Memo" on the left and a small upward-pointing arrow on the right. Below the header is a large, empty yellow rectangular text area for entering comments or questions.

6. Review the information and click **Confirm**.

Note: If needed, click **Edit** to return to the **Add New Cardholder** page and enter the new information.

7. A **Successfully Submitted** notification will appear.

Cardholder Search

1. From the **Home** page, click **Account Management > Search Cardholder**
2. Enter one or any combination of search options and click **Search**.

The screenshot shows the 'Search Cardholder' interface. At the top, there's a title bar with 'Search Cardholder' and a language selector set to 'English'. Below this is a search filter section with a red border. It contains eight input fields: 'Hierarchy Level', 'First Name', 'Last Name', 'Username', 'Account #', 'Phone Number', 'Social Security Number', and 'Email Address'. Each field has a corresponding icon. Below the filters are a 'Search' button with a magnifying glass icon and a 'Manage Filters' dropdown. The results section, titled 'Cardholder Search Results', shows 'Showing 10 Cardholders'. It contains a table with the following data:

Corporation	Account #	Name	Username	Company	Address	Status	Actions
NATIONAL BANK OF TESTING	448508***4627	HARRY H		00000012 COMPANY	100 MAIN STREET		
NATIONAL BANK OF TESTING	448508***4684	VIRTUAL ACCT COLLINS		00000012 COMPANY	2346 DRUID RD E		

3. Click the **View Cardholder Detail** icon to view cardholder information.

This screenshot is identical to the previous one, but with a red circle highlighting the 'View Cardholder Detail' icon (a magnifying glass over a person) in the 'Actions' column of the first row in the results table.

Cardholder Maintenance – Changing Credit Limit

The **Change Credit Limit** online request allows you to increase or decrease a cardholder's credit limit in real time.

1. From the **Home** page, click **Company Management > Search Company**
2. Enter the search criteria and click **Search**. The **Company Search Results** page is displayed. Click the **Online Request** icon.

3. From the **Online Requests** screen, select **Change Credit Limit**.

4. Complete the **Memo**, **Request Type**, and **New Credit Limit** fields. Click **Submit**.

If you select **Temporary Credit Limit**, the **Expiration Date** field appears and must be completed prior to clicking **Submit**.

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It is suggested to add one extra day to the date the temporary credit limit should expire to ensure the limit is valid through the expiration date.

Note: A temporary credit limit increase provides an increase to a cardholder's credit limit until a specified date as established by a Company Administrator. The credit limit will return to the previously established credit limit on the specified date. In contrast, a permanent credit limit increase will remain in effect until changed by a Company Administrator.

5. Review the information and click **Confirm**. A confirmation message will display.

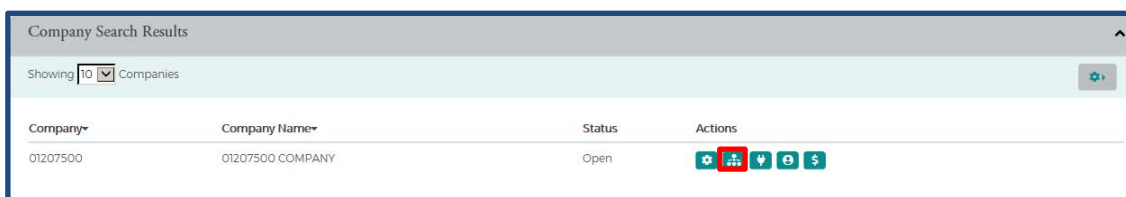
Important






- A Credit Limit Change cannot be processed if an account is in a Closed or Blocked status.
- Requested credit limit change cannot exceed the company limit.
- Requested credit limit change must be different than the cardholder's current credit limit.

Central Bill Enrollment for Online Access

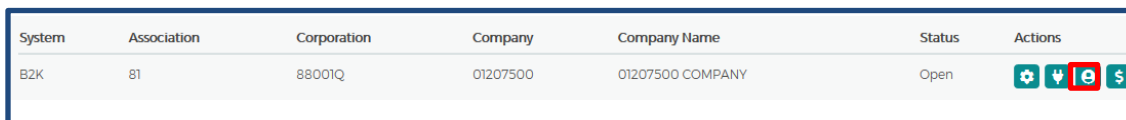
For companies utilizing Central Billing, it is recommended for a Company Administrator to enroll the Central Bill account to be viewed online. By doing this, the Administrator may view and print statements, make single or recurring payments, and view company rewards (if applicable) for the entire card program. For companies with Individual Billing, the same enrollment process may be followed to access individual cardholder statements and rewards.





1. From the **Home** page, click **Company Management > Search Company**
2. Click the **View Hierarchy** icon



Company Search Results			
Showing 10 Companies			
Company	Company Name	Status	Actions
01207500	01207500 COMPANY	Open	    

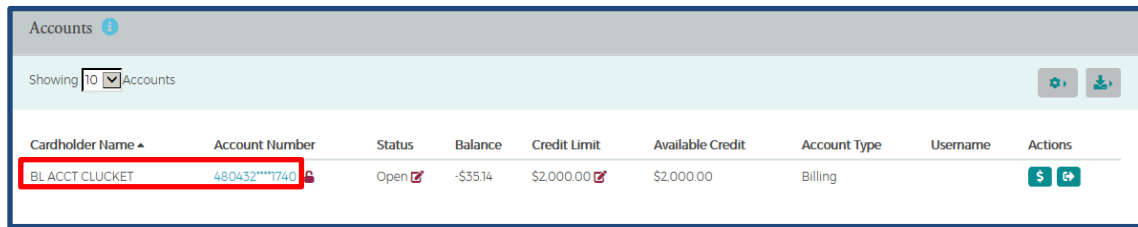
3. Click the **Account List** icon to view all cardholders associated with your company.





System	Association	Corporation	Company	Company Name	Status	Actions
B2K	81	88001Q	01207500	01207500 COMPANY	Open	   

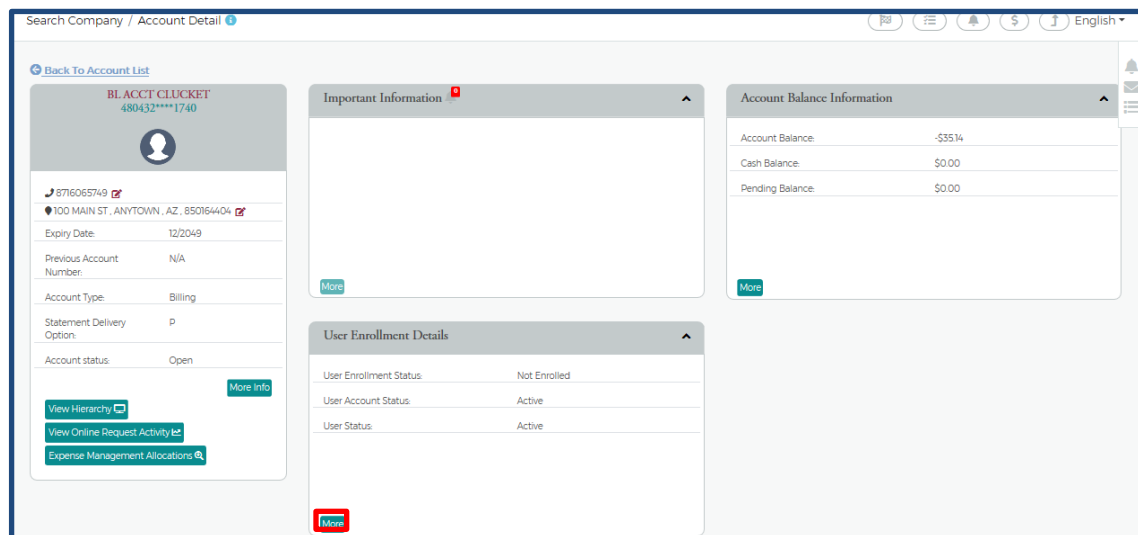
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4. Locate and click on the Central Bill account which is denoted as 'BL ACCT'.



Cardholder Name	Account Number	Status	Balance	Credit Limit	Available Credit	Account Type	Username	Actions
BL ACCT CLUCKET	480432****1740	Open	-\$35.14	\$2,000.00	\$2,000.00	Billing		 

5. On the **Account Detail** screen, click **More** located in the **User Enrollment Details** section.



Search Company / Account Detail

Back To Account List

BL ACCT CLUCKET
480432****1740

876065749
100 MAIN ST, ANYTOWN, AZ, 850864404
Expiry Date: 12/2049
Previous Account Number: N/A
Account Type: Billing
Statement Delivery Option: P
Account status: Open

View Hierarchy
View Online Request Activity
Expense Management Allocations

More info

Important Information

Account Balance Information

Account Balance:	-\$35.14
Cash Balance:	\$0.00
Pending Balance:	\$0.00

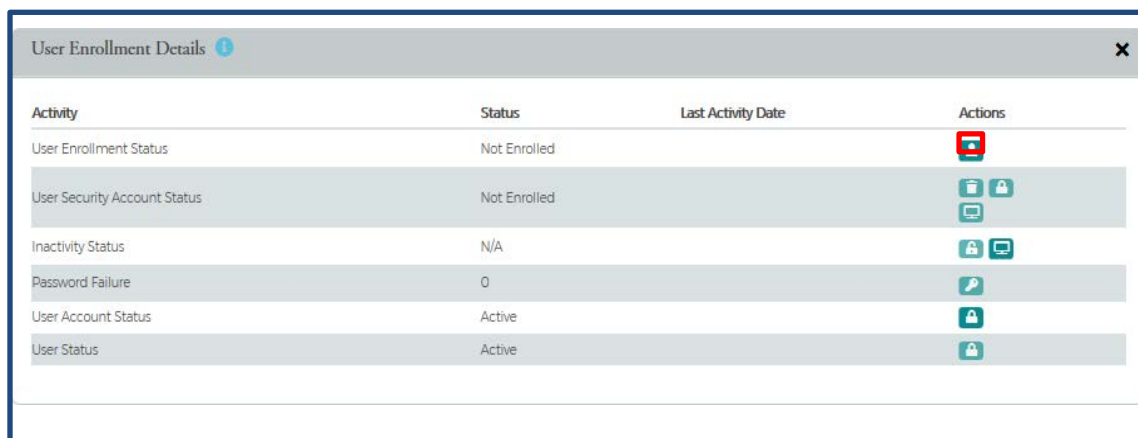
User Enrollment Details









User Enrollment Status	Not Enrolled
User Account Status	Active
User Status	Active

More

Important: Note the Expiration Date of the 'BL Acct' as it will be needed in step 7 to complete set up.

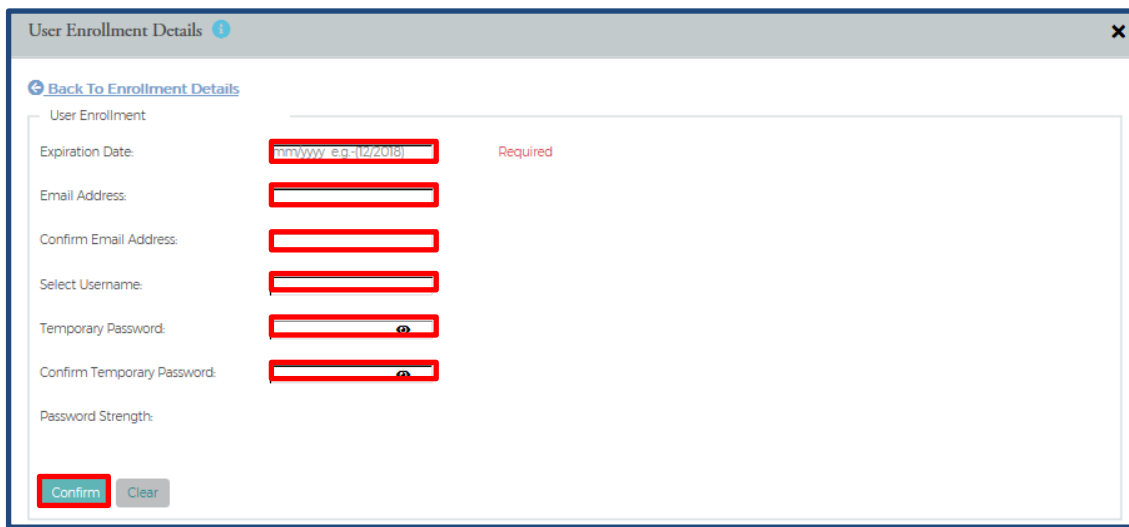
6. On the **User Enrollment Details** screen, click the **Enroll** icon located on the **User Enrollment Status** row.



Activity	Status	Last Activity Date	Actions
User Enrollment Status	Not Enrolled		
User Security Account Status	Not Enrolled		 
Inactivity Status	N/A		 
Password Failure	0		
User Account Status	Active		
User Status	Active		

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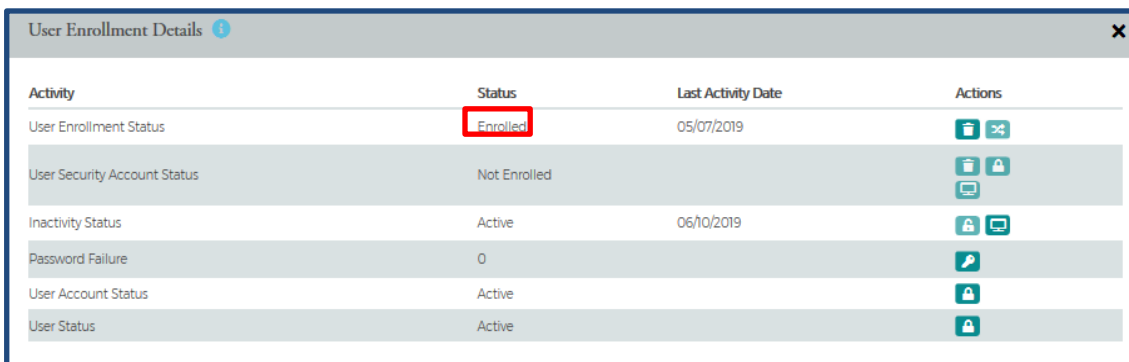
7. On the **User Enrollment Details** screen, enter the expiration date of the 'BL Acct'. Also, enter email address, then create a Username and Temporary Password. Click **Confirm**.












The screenshot shows the 'User Enrollment Details' form. It includes fields for 'Expiration Date' (with a placeholder 'mm/yyyy e.g. (12/2018)' and a 'Required' label), 'Email Address', 'Confirm Email Address', 'Select Username', 'Temporary Password', and 'Confirm Temporary Password'. A 'Password Strength' indicator is at the bottom. A red box highlights the 'Confirm' button.

Field	Value
Expiration Date	mm/yyyy e.g. (12/2018)
Email Address	
Confirm Email Address	
Select Username	
Temporary Password	
Confirm Temporary Password	
Password Strength	

8. Once complete, the User Enrollment **Status** will display as **Enrolled**.



The screenshot shows the 'User Enrollment Details' table. The 'Status' column for 'User Enrollment Status' is highlighted with a red box and contains the text 'Enrolled'.

Activity	Status	Last Activity Date	Actions
User Enrollment Status	Enrolled	05/07/2019	 
User Security Account Status	Not Enrolled		 
Inactivity Status	Active	06/10/2019	 
Password Failure	0		
User Account Status	Active		
User Status	Active		

If you have further questions, please contact MidFirst Commercial Services Support at 877-516-2777 or commercialservices@midfirst.com.