

eZBusiness Company Administrator User Guide

Table of Contents

Overview	3
Getting Started	4
Logging In.....	4
Home Page Overview	5
Site Help	6
Accessing Card Management Functions.....	7
Search Filters.....	7
Downloading Lists	8
Quick Links.....	8
Admin Management	9
Admin Security.....	9
Admin User Search	10
Manage Admin Information.....	10
Manage Personal Information	11
Security Account Status	12
Password Failure	12
Admin Lock	13
Company Management.....	14
View Company Hierarchies	14
View Company Account List.....	15
View Credit Limits	15
Cardholder Search	16
View Account Details.....	18
View Statements	19
View Transactions	22
Company Reports	24
Online Requests.....	26
Add New Cardholder Account.....	26
Change Address/Phone Number	29
Change Credit Limit	32
Alerts.....	34

Overview

eZBusiness Card Management is a powerful administration tool that allows company credit card program Admins to manage cardholder accounts.

eZBusiness allows company Admins to:

- Search and view company hierarchy and other detailed information regarding the company's card program
- Search for and view cardholder balances, transactions, and statements
- View cardholder transaction history and details
- Maintain and service cardholder accounts

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!

Getting Started

Logging In

To log into eZBusiness Card Management:

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**.

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.

Sign Up | Contact Us | English

eZ BUSINESS
CARD MANAGEMENT

2068: How will we mark FIS' 100th anniversary?
On Oct. 9, 2018, as we mark FIS' 50th anniversary, we'll tune into the events in Little Rock when we open the time capsule commemorating the founding of our company. We're excited and curious to see what they put in that capsule back in 1969!

Learn More

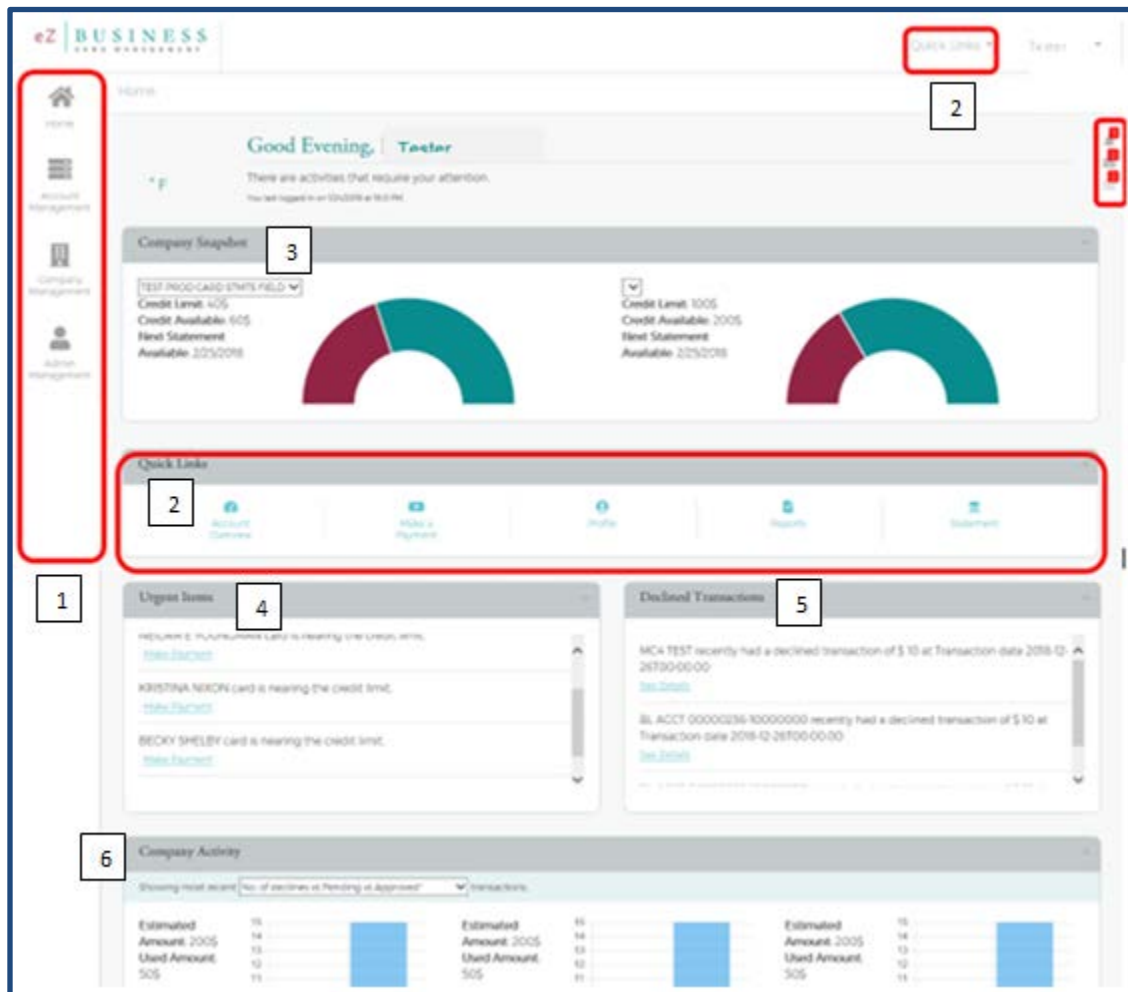
87%
STATISTIC

53%
STATISTIC

26%
STATISTIC

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 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.

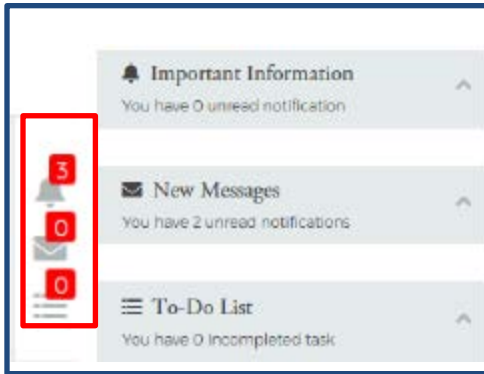
Elements appearing on the **Home** page:

1. **Side Navigation Bar:** Link to the 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

eZBusiness Admin User Guide

5. **Declined Transactions:** Provides information related to company users' declined transactions
6. **Company 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.

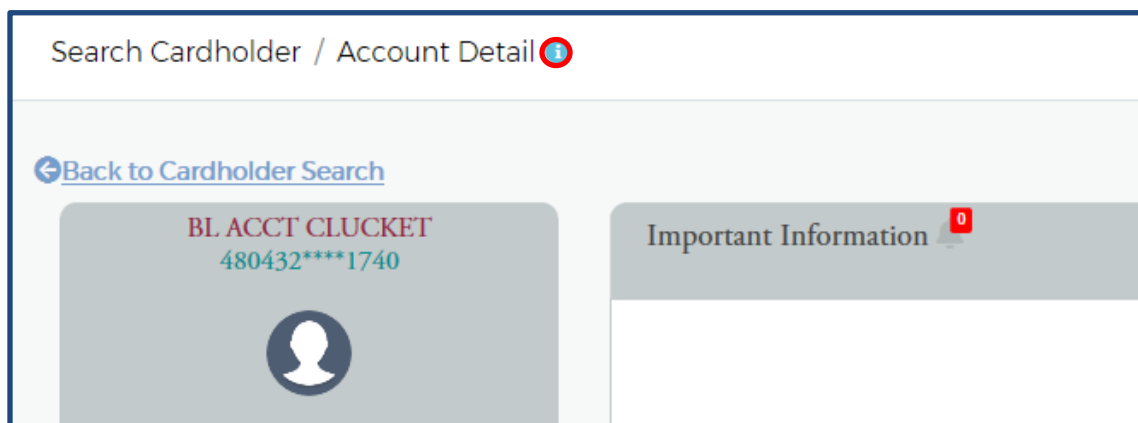
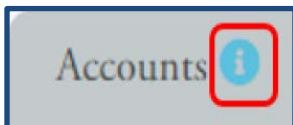


Icon definitions:

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

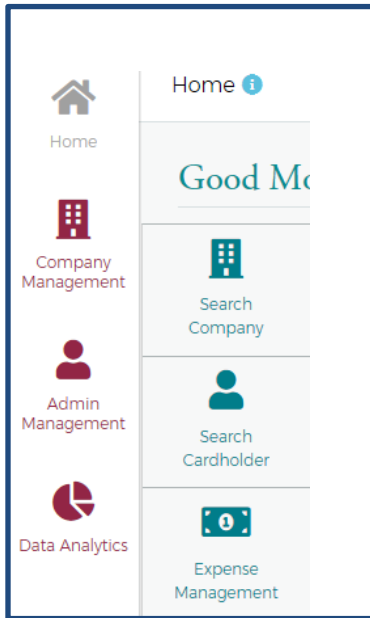
Site Help

Clicking the **Information Icon** provides access to the **Help** section.



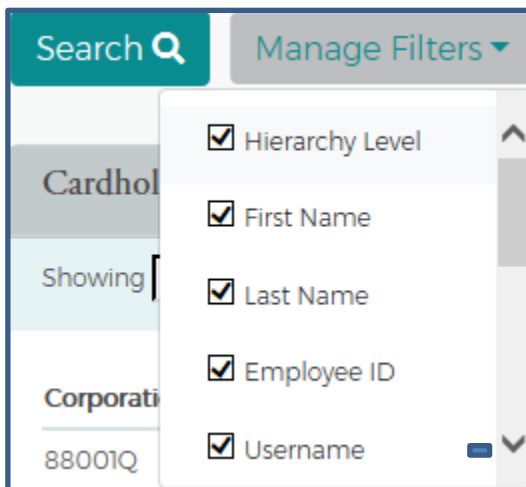
Accessing Card Management Functions

The **Main Menu** is used to navigate to functions within the site. Click on **Company Management**, **Admin Management** or **Data Analytics** to expand menu options, which are based on your security settings.



Search Filters

Each **Search Page** includes a **Manage Filters** option. Select the fields you would like to filter by clicking **Manage Filters** and selecting your search preferences for that page. Search options will vary based on the type of search.



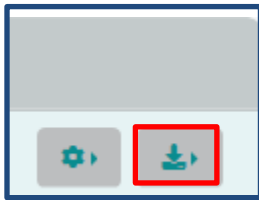
Downloading Lists

Some lists within eZBusiness can be downloaded using any of the following formats:

- Comma separated (.csv) format
- Excel (.xls) format
- Text (tab spacing) format

Perform the following steps:

1. Click the **Export** icon next to the specified list.



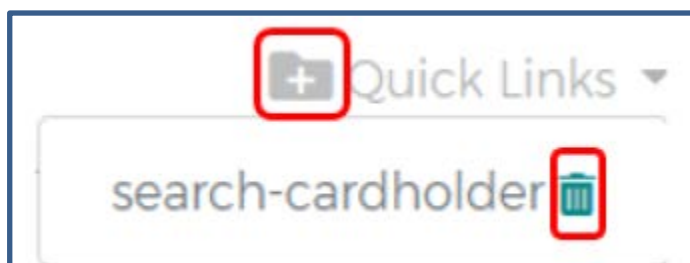
2. Select the desired format option and save the file to a specified location on your computer or network.



Note: Selecting **All Columns** will download all available columns. Selecting **Configured Columns** will only download the columns that you have selected in the view.

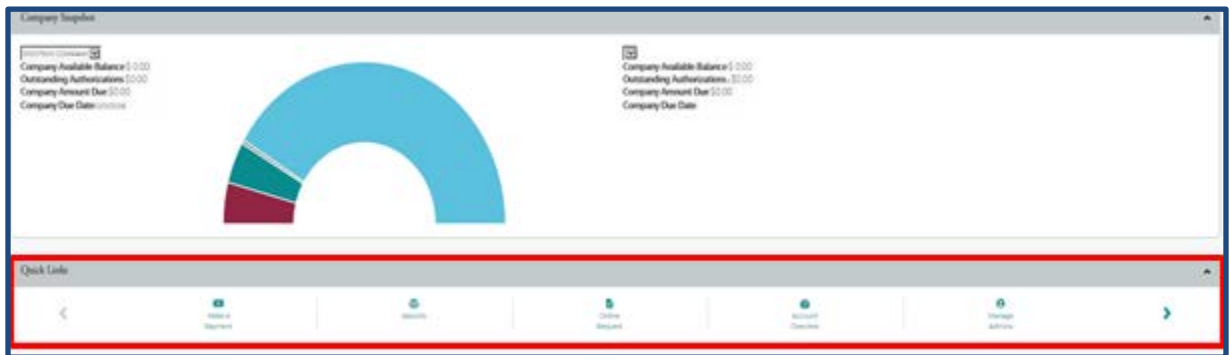
Quick Links

The **Quick Links** icon located at the top of each page allows you to add a link to pages you use most. Navigate to the page that you want to add and click the + icon next to **Quick Links**. You can delete a page from your **Quick Links** by clicking the **Delete** icon next to that page in the list.



eZBusiness Admin User Guide

The **Quick Links** that you select will appear toward the middle of the **Home Page**



Admin Management

Admin Security

Admin Security is used to manage Admin user accounts, define user functions and security access levels, and associate them with an Admin level hierarchy. Admin security consists of a Profile and Roles for each Admin user.

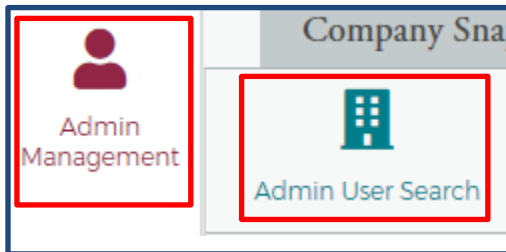
If a user has proper security access, they can manage the users in an Admin group by performing the following tasks:

- Create new Admin user
- Associate Admin user with hierarchies
- Set Admin user IP address restrictions
- Create and reset Admin user passwords
- Lock Admin users from accessing eZBusiness
- View Admin user login activity
- View Admin user security account activity

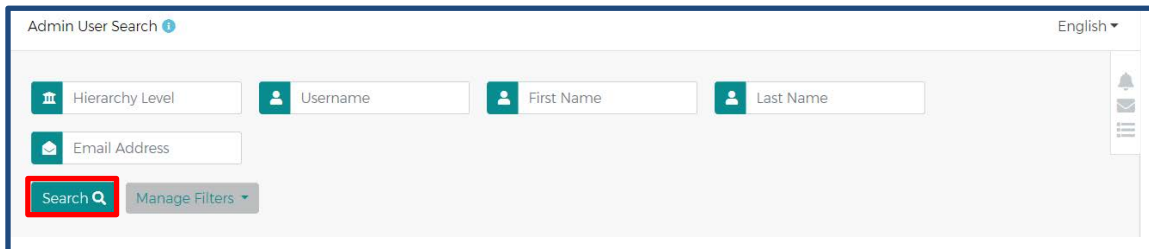
For assistance with Admin Management, please contact MidFirst Commercial Services at 877-516-2777.

Admin User Search

1. From the **Home Page**, click **Admin Management > Admin User Search**.



2. Enter applicable search criteria and click **Search**.

A screenshot of the 'Admin User Search' form. The form has a title bar 'Admin User Search' with a help icon and a language dropdown set to 'English'. Below the title bar, there are five input fields: 'Hierarchy Level', 'Username', 'First Name', 'Last Name', and 'Email Address'. Each field has a corresponding icon (person, person, person, person, and envelope respectively). At the bottom left, there is a 'Search' button with a magnifying glass icon, which is highlighted with a red box. To its right is a 'Manage Filters' button with a dropdown arrow.

Note: All Admin Users you have access to will be displayed in the **Admin User Search Results** list before you enter search criteria. Search criteria only needs to be entered if you want to filter down the list. You can click on the **Manage Filters** button to select the filters that you would like displayed.

Manage Admin Information

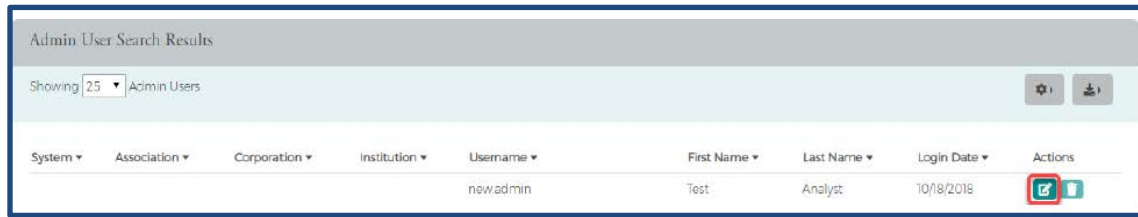
From the **Manage Admin User** page, you can:


- Update an Admin's personal information
- Manage an Admin User's security account status
- Change an Admin's password
- Lock/unlock an Admin's account

eZBusiness Admin User Guide

To manage an Admin user's account, perform the following steps:

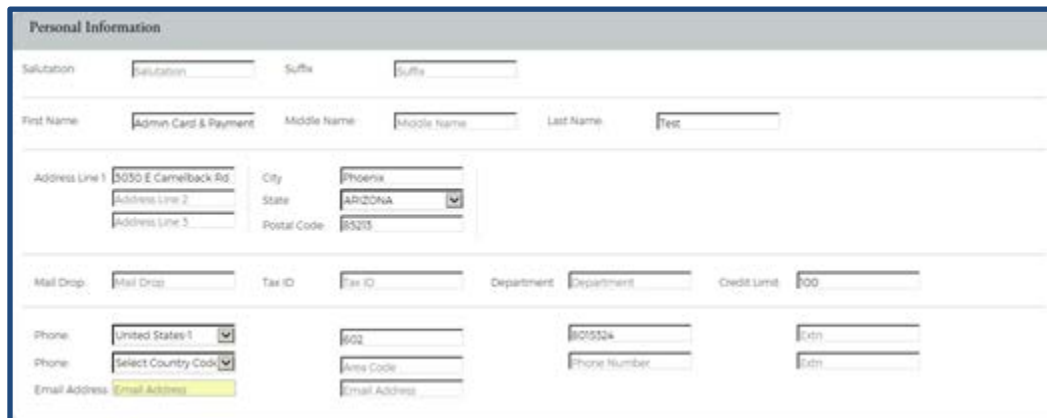
From the **Admin User Search Results** page, click the **Manage Admin User** icon.



System	Association	Corporation	Institution	Username	First Name	Last Name	Login Date	Actions
				newadmin	Test	Analyst	10/18/2018	

Manage Personal Information

You can update an Admin User's personal information in the **Personal Information** section of the **Manage Admin User** page.



Salutation	<input type="text"/>	Suffix	<input type="text"/>
First Name	<input type="text" value="Admin Card & Payment"/>	Middle Name	<input type="text" value="Middle Name"/>
Last Name	<input type="text" value="Test"/>		
Address Line 1	<input type="text" value="5050 E Camelback Rd"/>	City	<input type="text" value="Phoenix"/>
Address Line 2	<input type="text"/>	State	<input type="text" value="ARIZONA"/>
Address Line 3	<input type="text"/>	Postal Code	<input type="text" value="85203"/>
Mail Drop	<input type="text" value="Mail Drop"/>	Tax ID	<input type="text" value="Tax ID"/>
Department	<input type="text" value="Department"/>	Credit Limit	<input type="text" value="\$00"/>
Phone	<input type="text" value="United States 1"/>	<input type="text" value="902"/>	<input type="text" value="8015524"/>
Phone	<input type="text" value="Select Country Code"/>	<input type="text" value="Area Code"/>	<input type="text" value="Phone Number"/>
Email Address	<input type="text" value="Email Address"/>	<input type="text" value="Email Address"/>	<input type="text" value="Email Address"/>

Once updates are completed, click the **Modify Admin User** button at the bottom of the screen.

Modify Admin User

Security Account Status

A Primary Company Administrator may assist a user who has locked their security account by failing login authentication.

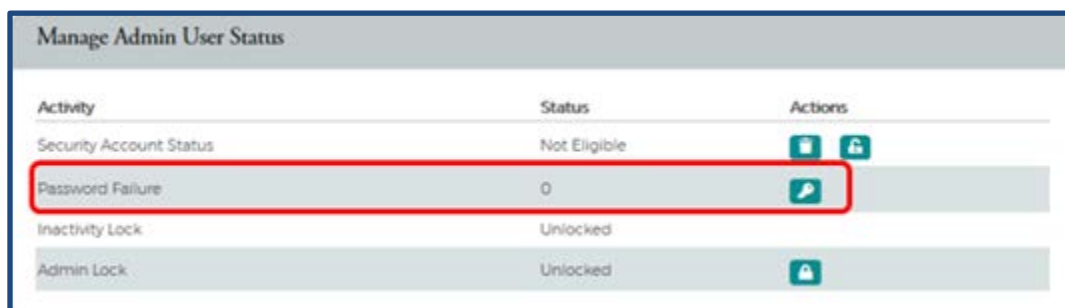
From the **Manage Admin User** page in the **Manage Admin User Status** section, click on the **Lock/Unlock** icon in the **Security Account Status** row. The icon will indicate locked/unlocked status.







Activity	Status	Actions
Security Account Status	Not Eligible	 
Password Failure	1	
Inactivity Lock	Unlocked	
Admin Lock	Unlocked	

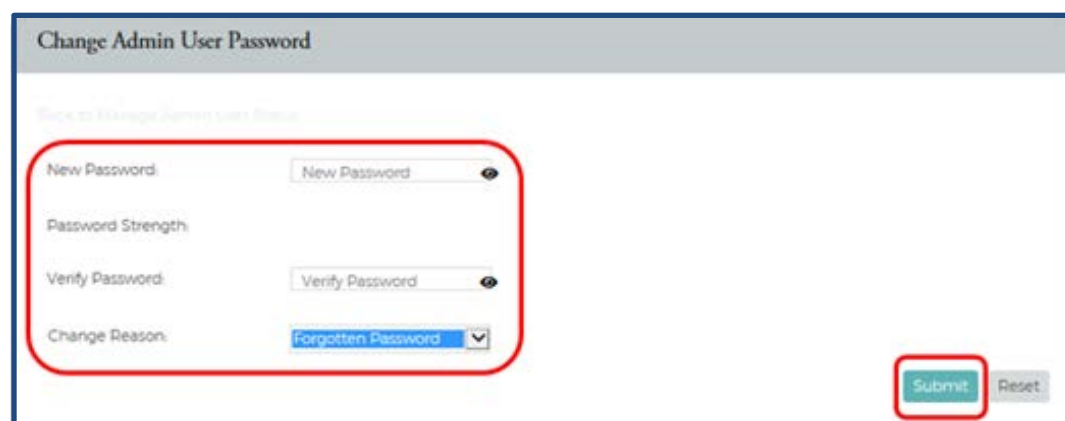
Password Failure

1. In the **Manage Admin User Status** section of the **Manage Admin User** page, click the **Change Password** icon in the **Password Failure** row.




Activity	Status	Actions
Security Account Status	Not Eligible	 
Password Failure	0	
Inactivity Lock	Unlocked	
Admin Lock	Unlocked	

2. Enter the required information in the **Change Admin User Password** section and click Submit.




Change Admin User Password

[Back to Manage Admin User Status](#)

New Password: 

Password Strength:

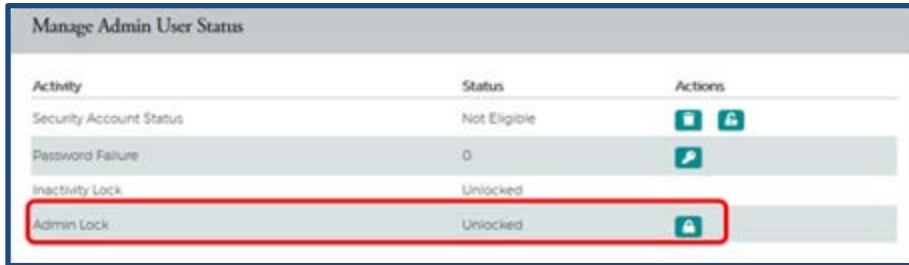
Verify Password: 

Change Reason:

Admin Lock

Admin Security allows you to lock and unlock admin user accounts.

1. In the **Manage Admin User Status** section of the **Manage Admin User** page, click the **Lock** icon in the Admin Lock row.



2. Select the required option from the drop-down menu or enter a reason and click the icon to save.



3. A message displays in the bottom right corner indicating the user is locked.






Note: To unlock a user account, click the **Unlock** icon on the **Manage Admin User** page. A confirmation message will display.

Company Management





View Company Hierarchies

The **View Company Hierarchy** allows you to view your company and any related sub-levels, if applicable.

1. From the **Company Search Results** page, click the **Hierarchy** icon.

Company	Company Name	Status	Actions
01207500	01207500 COMPANY	Open	    

2. Click the **Account List** icon to view the Accounts page to view the accounts associated with the company or sublevel.

Hierarchy	Hierarchy Name	Status	Actions
2 - 20000001	01207500 COMPANY	Open	 
2 - 20000002	01207500 COMPANY	Open	
3 - 30000001	01207500 COMPANY	Open	

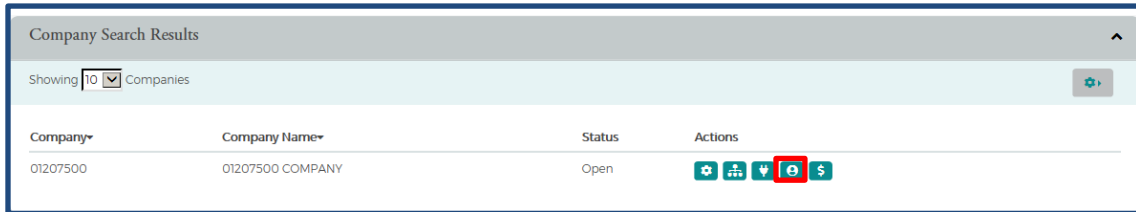
Elements on the **View Hierarchy** page:

- Hierarchy Level – Company’s hierarchal level
- Hierarchy ID – Unique ID number assigned to each hierarchy
- Hierarchy Name – Company name used in the hierarchy
- Status – Status of the company’s account – Open, Closed, Inactive.

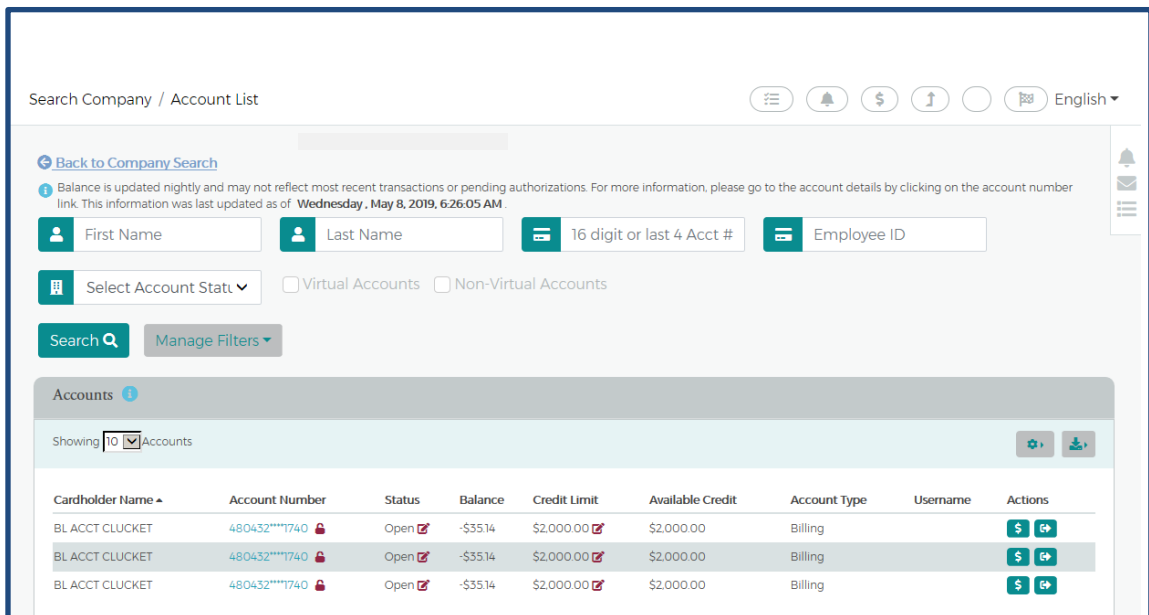
View Company Account List

To search for or view a list of company accounts:

1. From the **Company Search Results** page, click the **Account List** icon

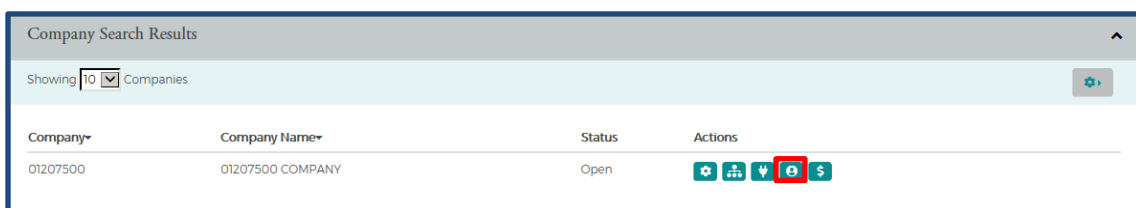


2. All accounts associated with the company will display. You can filter the list by using the search function.



View Credit Limits

1. From the **Company Search Results** page, click the **Account List** icon.



eZBusiness Admin User Guide

2. The **Account List** page displays the Credit Limit for each account, in addition to other account information.

Search Company / Account List

[Back to Company Search](#)

Balance is updated nightly and may not reflect most recent transactions or pending authorizations. For more information, please go to the account details by clicking on the account number link. This information was last updated as of **Wednesday, May 8, 2019, 6:26:05 AM**.

First Name Last Name 16 digit or last 4 Acct # Employee ID

Select Account Status ☐ Virtual Accounts ☐ Non-Virtual Accounts

Search Manage Filters

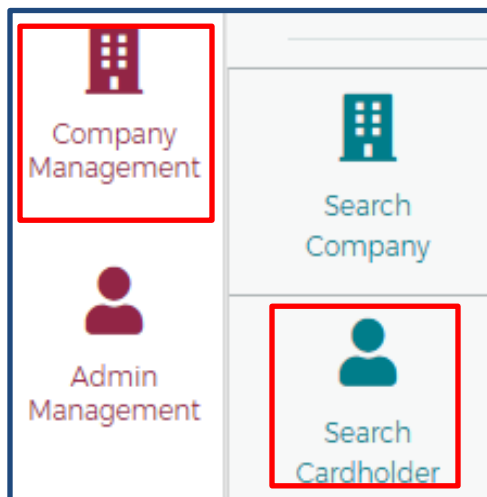
Accounts

Showing 10 Accounts

Cardholder Name	Account Number	Status	Balance	Credit Limit	Available Credit	Account Type	Username	Actions
BL ACCT CLUCKET	480432****740	Open	-\$3514	\$2,000.00	\$2,000.00	Billing		
BL ACCT CLUCKET	480432****740	Open	-\$3514	\$2,000.00	\$2,000.00	Billing		
BL ACCT CLUCKET	480432****740	Open	-\$3514	\$2,000.00	\$2,000.00	Billing		

Cardholder Search

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



eZBusiness Admin User Guide

2. Enter one or any combination of search options and click **Search**.

Search Cardholder ⓘ English ▾

Hierarchy Level First Name Last Name Employee ID

Username 16 digit or last 4 Acct # Email Address SSN

Search 🔍 Manage Filters ▾

Cardholder Search Results

Showing 10 Cardholders ⚙️ 👤

Corporation	Account Number	Employee ID	Cardholder	Username	Status	Account Balance	Credit Limit	Actions
88001Q	480432****		BL ACCT CLUCKET		Open	-\$3514	\$2,000.00	👁️
88001Q	480432****		BL ACCT CLUCKET		Open	-\$3514	\$2,000.00	👁️
88001Q	480432****		BL ACCT CLUCKET		Open	-\$3514	\$2,000.00	👁️

Note: All accounts that you have access to will be displayed in the **Cardholder Search Results** before you enter the search criteria. Search criteria only needs to be entered if you want to filter down the cardholder list.

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

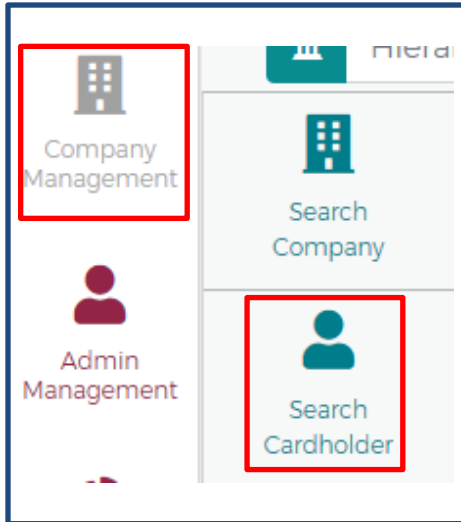
Cardholder Search Results

Showing 10 Cardholders ⚙️ 👤




Corporation	Account Number	Employee ID	Cardholder	Username	Status	Account Balance	Credit Limit	Actions
88001Q	480432****		BL ACCT CLUCKET		Open	-\$3514	\$2,000.00	👁️
88001Q	480432****		BL ACCT CLUCKET		Open	-\$3514	\$2,000.00	👁️
88001Q	480432****		BL ACCT CLUCKET		Open	-\$3514	\$2,000.00	👁️

View Account Details

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



2. From the **Cardholder Search Results** page, click the **Account Details** icon to view the details of that account.

Cardholder Search Results								
Showing 10 Cardholders								
Corporation	Account Number	Employee ID	Cardholder	Username	Status	Account Balance	Credit Limit	Actions
88001Q	480432****		BL ACCT CLUCKET		Open	-\$35.14	\$2,000.00	
88001Q	480432****		BL ACCT CLUCKET		Open	-\$35.14	\$2,000.00	
88001Q	480432****		BL ACCT CLUCKET		Open	-\$35.14	\$2,000.00	

eZBusiness Admin User Guide

3. The **Account Detail** Page displays account and cardholder information. It also provides links for viewing account transactions and details of outstanding transactions.

The screenshot displays the 'Account Detail' page for a cardholder. The page is divided into several sections:

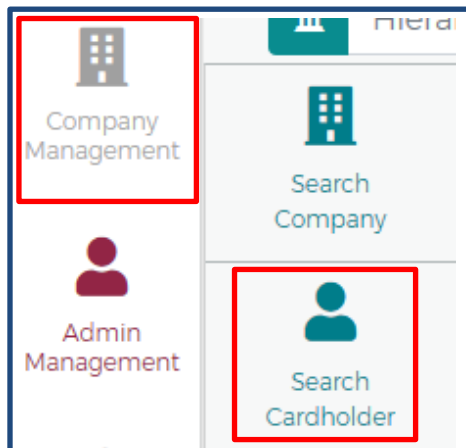
- Account Information:** Displays the cardholder's name (BL ACCT CLUCKET), card number (480432****1740), phone number (8716065749), address (100 MAIN ST, ANYTOWN, AZ, 850164404), expiry date (12/2049), previous account number (N/A), account type (Billing), statement delivery option (P), and account status (Open). Links for 'View Hierarchy', 'View Online Request Activity', and 'Expense Management Allocations' are provided.
- Important Information:** A section with a red notification icon and a 'More' link.
- Account Balance Information:** A table showing the current account balance, cash balance, and pending balance, all with 'More' links.
- User Enrollment Details:** A table showing the user's enrollment status, activity, locked/unlocked status, and user status.

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

User Enrollment Details	
User Enrollment Status / User Activity:	Not Enrolled
Locked/Unlocked:	Active
User Status:	Active




View Statements

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




eZBusiness Admin User Guide

- From the **Cardholder Search Results** page, click the **Accounts Details** icon next to the specific cardholder you wish to view a statement for.

Cardholder Search Results								
Showing 10 Cardholders								
Corporation	Account Number	Employee ID	Cardholder	Username	Status	Account Balance	Credit Limit	Actions
88001Q	480432****		BL ACCT CLUCKET		Open	-\$35.14	\$2,000.00	
88001Q	480432****		BL ACCT CLUCKET		Open	-\$35.14	\$2,000.00	
88001Q	480432****		BL ACCT CLUCKET		Open	-\$35.14	\$2,000.00	

- From the **Account Detail** page, click the **More** button in the **Account Balance Information** section to view account balance details.

BL ACCT CLUCKET
480432****1740



8716065749

100 MAIN ST, ANYTOWN, AZ, 850184404

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

More

Account Balance Information

Account Balance: -\$35.14

Cash Balance: \$0.00

Pending Balance: \$0.00

More

User Enrollment Details

User Enrollment Status / User Activity: Not Enrolled

Locked/Unlocked: Active

User Status: Active

More

eZBusiness Admin User Guide

- Click the **View Statements** link in the **Statement & Payment Information** section.

Account Balance Information ⓘ

Account Balance Summary

Account Balance:	-\$35.14	View Details	Credit Limit:	\$2,000.00
Cash Balance:	\$0.00		Cash Limit:	\$200.00
Pending Balance:	\$0.00	View Pending Balance Decline Transaction	Past Due Amount:	\$0.00
Available Credit:	\$2,000.00		Overlimit Amount:	\$0.00
Available Cash:	\$200.00		Disputed Amount:	\$13,548.00

Statement&Payment Information

Last Statement Amount:	-\$35.14	View Statements	Last Payment Date:	03/01/2019
Last Statement Date:	05/01/2019		Account open date:	04/27/2015 ⓘ
Minimum Payment Due:	\$0.00		Expiration Date:	12/2049
Payment Due Date:	05/28/2019		Last Activity Date:	05/01/2019
Last Payment Amount:	\$263.83			

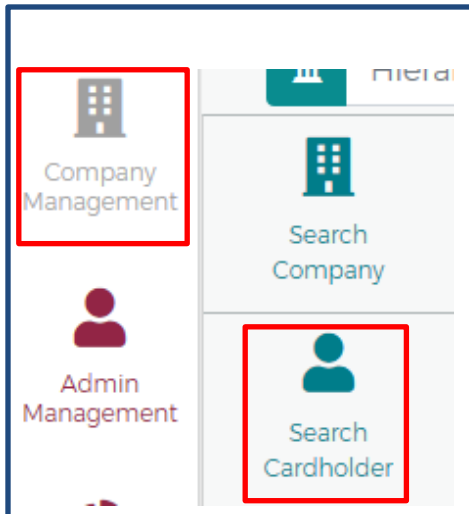
- The Statement Details section is displayed. Click on a row to view a statement information page.

Statement Details ⓘ				
Showing 10 Statements ⓘ				
Account Number	Cardholder Name	Statement Date ▾	Balance ▾	Min Due ▾
480432****1740	BL ACCT CLUCKET	05/01/2019	-\$35.14	\$0.00

Note: An actual copy of a statement can be obtained from a cardholder's account in Business Credit Card Online Banking.

View Transactions

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



2. From the **Cardholder Search Results** page, click the **Account Details** icon to view the details for that account.

Cardholder Search Results								
Showing 10 Cardholders								
Corporation	Account Number	Employee ID	Cardholder	Username	Status	Account Balance	Credit Limit	Actions
88001Q	480432****		BL ACCT CLUCKET		Open	-\$3514	\$2,000.00	
88001Q	480432****		BL ACCT CLUCKET		Open	-\$3514	\$2,000.00	
88001Q	480432****		BL ACCT CLUCKET		Open	-\$3514	\$2,000.00	

eZBusiness Admin User Guide

- From the **Account Detail** page, click the **More** button in the **Account Balance Information** section to view account balance details.

The screenshot shows the 'Account Detail' page for 'BLACCT CLUCKET' with ID '480432****1740'. The left sidebar contains account details like phone number, address, and account type. The main content area has three sections: 'Important Information' (empty), 'Account Balance Information' (showing Account Balance: -\$35.14, Cash Balance: \$0.00, Pending Balance: \$0.00), and 'User Enrollment Details' (showing User Enrollment Status / User Activity: Not Enrolled, Locked/Unlocked: Active, User Status: Active). A red box highlights the 'More' button in the 'Account Balance Information' section.

- In the **Account Balance Information** section, click on the **View Details** link next to **Account Balance**.

The screenshot shows the 'Account Balance Information' section. It contains two main sections: 'Account Balance Summary' and 'Statement&Payment Information'. The 'Account Balance Summary' section displays a table of account balances and limits. A red box highlights the 'View Details' link next to the 'Account Balance' value of -\$35.14. The 'Statement&Payment Information' section displays a table of statement and payment details.

Account Balance Summary				
Account Balance:	-\$35.14	View Details	Credit Limit:	\$2,000.00
Cash Balance:	\$0.00		Cash Limit:	\$200.00
Pending Balance:	\$0.00	View Pending Balance Decline Transaction	Past Due Amount:	\$0.00
Available Credit:	\$2,000.00		Overlimit Amount:	\$0.00
Available Cash:	\$200.00		Disputed Amount:	\$13,592.00

Statement&Payment Information				
Last Statement Amount:	-\$35.14	View Statements	Last Payment Date:	03/01/2019
Last Statement Date:	06/02/2019		Account open date:	04/28/2015
Minimum Payment Due:	\$0.00		Expiration Date:	12/2049
Payment Due Date:	06/28/2019		Last Activity Date:	06/02/2019
Last Payment Amount:	\$263.83			

5. The **Transaction Details** page displays cardholder transactions at the company level or sublevel. You can search for specific transactions to limit the number of rows displayed.

The screenshot shows the 'Transaction Details' page. It features a search section with the following filters: 'Description' (text input), 'Reference' (text input), 'Categories' (text input), 'Post Date' (dropdown), 'Trans Date' (dropdown), and 'Less Than' (dropdown with a corresponding amount input). There are 'Search' and 'Manage Filters' buttons. Below the filters is a table header with columns: 'Originating Account', 'Posting Date', 'Trans Date', 'Description', 'Categories', 'Reference', and 'Amount'. The table body is empty, displaying the message 'No Record Exists'.

Note: Search results can be exported.

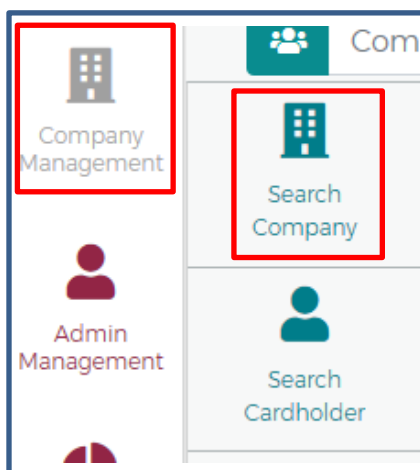
Company Reports

Transaction Reports

The Company Report page allows you to view and download:

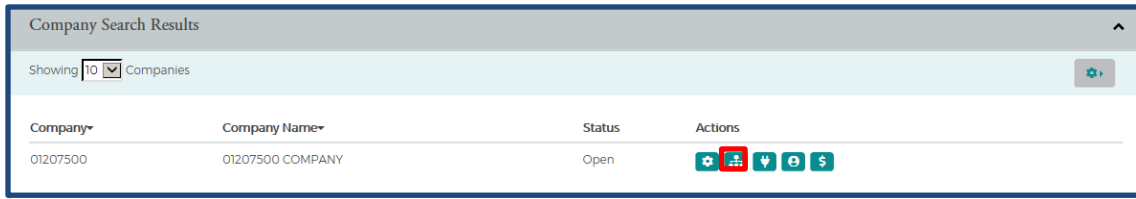
- Transaction reports
- Spend restrictions
- Merchant group codes
- Credit lines

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



eZBusiness Admin User Guide

- From the **Company Search Results** page, click the **Hierarchy** icon.



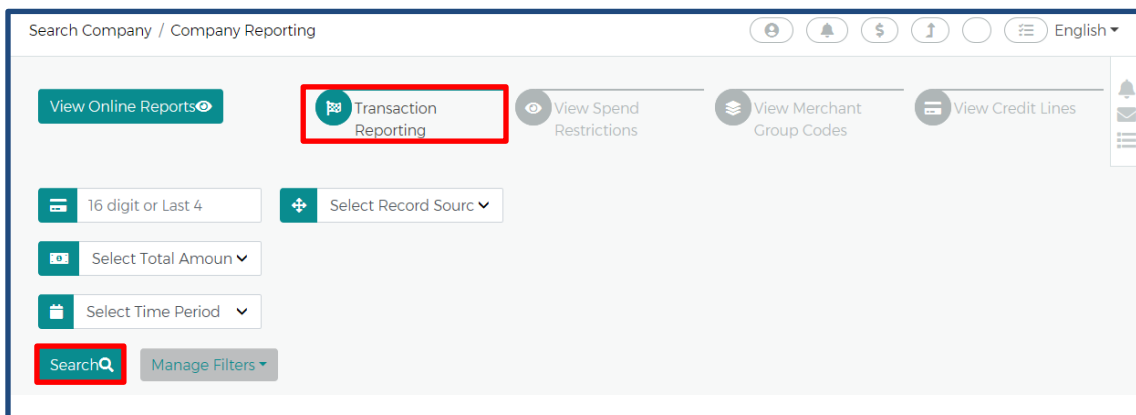
- Click the **Account List** icon next to the hierarchy name.



- Click the **Company Reporting** icon at the top of the page.



- Use the filters on the left side of the screen to narrow search results if desired. Click **Search**.



6. Sample Transactions Report.

Transactions Report					
Showing 10 Transactions					
Cardholder Name	Account	Posting Date	Transaction Date	Reference Number	Total Amount
BL ACCT CLABBAR	499936****2812	05/12/2019	05/12/2019	74999369132614132564002	\$56.73
BL ACCT CLABBAR	499936****2812	05/12/2019	05/12/2019	74999369132616132762007	\$35.00
BL ACCT CLANDRE	499936****2209	05/12/2019	05/12/2019	74999369132604132564003	\$30.47
BL ACCT CLANDRE	499936****2209	05/12/2019	05/12/2019	74999369132606132762008	\$35.00
BL ACCT CLAVEST	499936****3672	05/12/2019	05/12/2019	74999369132607132864000	\$114.58
BL ACCT CLAVEST	499936****3672	05/12/2019	05/12/2019	74999369132609132062007	\$35.00
BL ACCT CLAVEST	499936****0242	05/12/2019	05/12/2019	74999369132617132864009	\$81.84
BL ACCT CLAVEST	499936****0242	05/12/2019	05/12/2019	74999369132619132062006	\$35.00
BL ACCT CLEVURN	499936****5820	05/12/2019	05/12/2019	74999369132624132562005	\$35.00
BL ACCT CLEVURN	499936****5820	05/12/2019	05/12/2019	749993691326221323564000	\$22.69
Subtotal:					-\$481.31
Total:					\$61,618,449.73

Note: Results can be exported by selecting the Export Option in the upper right-hand corner.

7. Sample View Credit Lines Report.

View Credit Lines							
Showing 10 credit lines							
Company Hierarchy	Current Account Status	Account Type	Account #	Cardholder Name	Permanent Credit Limit	Cash Limit	Current Account Balance
	Open	Billing	499936****0508	BL ACCT CLABBAR	\$2500	\$2500	\$142.99
	Open	Billing	499936****8022	BL ACCT CLABBAR	\$28000	\$7000	\$247.34
	Open	Billing	499936****2812	BL ACCT CLABBAR	\$28000	\$7000	\$4206.24
	Open	Billing	480432****5247	BL ACCT CLABBAR	\$25000	\$0	\$9174.53
	Open	Billing	480432****5247	BL ACCT CLABBAR	\$25000	\$0	\$9174.53
	Open	Billing	480432****2180	BL ACCT CLABBAR	\$250000	\$0	\$43045.77
	Closed	Billing	480432****6875	BL ACCT CLABBAR	\$1000000	\$0	\$0
	Open	Billing	499936****6380	BL ACCT CLABBAR	\$20000	\$5000	\$-1090.46
	Open	Billing	499936****7913	BL ACCT CLABBAR	\$10000	\$2500	\$1663.71
	Open	Billing	499936****3338	BL ACCT CLABBAR	\$15000	\$0	\$557.61

Online Requests

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.

eZBusiness Admin User Guide

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.


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

- 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

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

Other Phone: Other Phone Other Phone Type: B:Business

Memo

Submit Cancel

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.

eZBusiness Admin User Guide

5. If applicable, enter questions or comments about the request in the **Memo** field and click **Submit**.

A screenshot of a web form with a label 'Memo' at the top left and a small upward arrow icon at the top right. Below the label is a large, empty yellow rectangular text area.

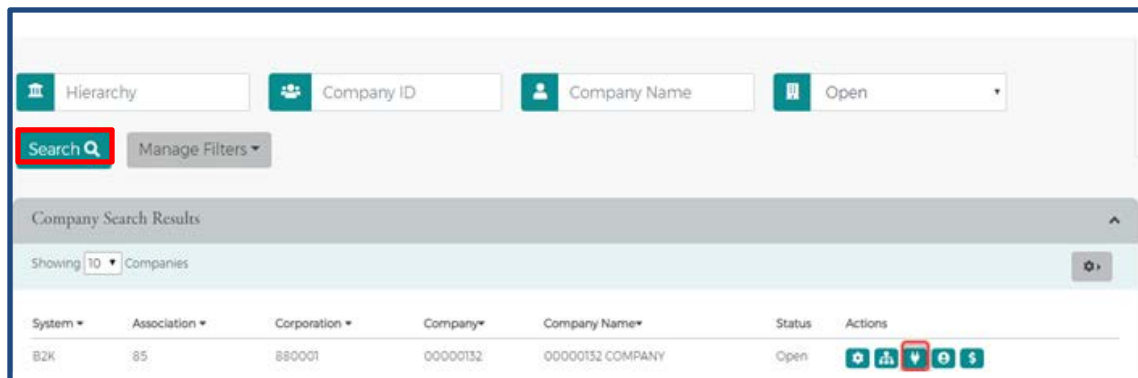
6. Review the information and click **Confirm**.

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.

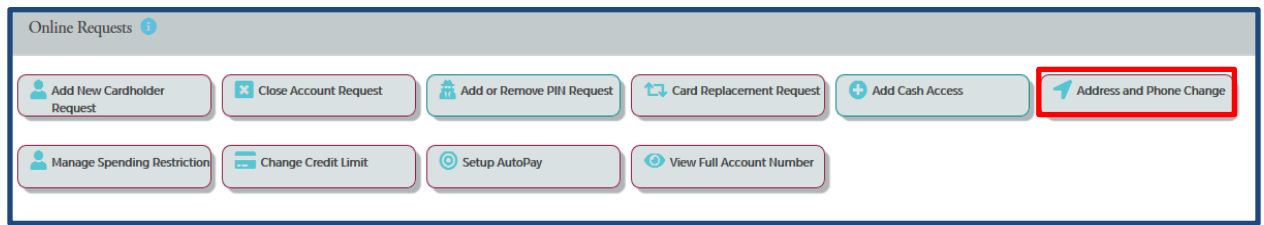
Change Address/Phone Number

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.

A screenshot of the 'Company Search Results' page. At the top, there are four search filters: 'Hierarchy' (with a building icon), 'Company ID' (with a person icon), 'Company Name' (with a person icon), and 'Open' (with a list icon). Below these is a red 'Search' button with a magnifying glass icon and a 'Manage Filters' button. The main section is titled 'Company Search Results' and shows 'Showing 10 Companies'. Below this is a table with columns: System, Association, Corporation, Company, Company Name, Status, and Actions. The first row of data shows: B2K, 85, 880001, 00000132, 00000132 COMPANY, Open, and a set of action icons. The 'Search' button and the 'Online Request' icon (a person with a plus sign) in the Actions column are highlighted with red boxes.

System	Association	Corporation	Company	Company Name	Status	Actions
B2K	85	880001	00000132	00000132 COMPANY	Open	[Icons: Add, Edit, Delete, Online Request]

3. From the **Online Requests** screen, select **Address and Phone Change**.

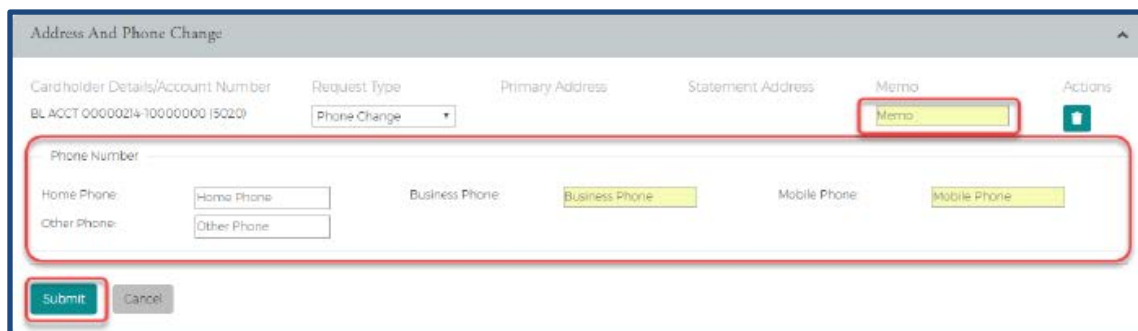


The screenshot shows the 'Online Requests' interface. It features a header bar with the title 'Online Requests' and a help icon. Below the header, there are two rows of buttons. The first row includes 'Add New Cardholder Request', 'Close Account Request', 'Add or Remove PIN Request', 'Card Replacement Request', 'Add Cash Access', and 'Address and Phone Change'. The second row includes 'Manage Spending Restriction', 'Change Credit Limit', 'Setup AutoPay', and 'View Full Account Number'. The 'Address and Phone Change' button is highlighted with a red rectangular border.

4. Select the request type from the drop-down menu and add a note to the Memo field. Request type drop-down options are:
- Address Change
 - Phone Change
 - Address and Phone Change

Note: This is a real-time process.

Phone Change Request – Change or add the phone number in the appropriate field and click **Submit**



The screenshot shows the 'Address And Phone Change' form. It has a header bar with the title 'Address And Phone Change'. Below the header, there are several fields: 'Cardholder Details/Account Number' (BL ACCT 00000214-10000000 (5020)), 'Request Type' (a dropdown menu with 'Phone Change' selected), 'Primary Address', 'Statement Address', 'Memo' (a text field with 'Memo' entered), and 'Actions' (a green button with a plus icon). Below these fields, there is a section for 'Phone Number' with four input fields: 'Home Phone', 'Business Phone', 'Mobile Phone', and 'Other Phone'. The 'Submit' button is highlighted with a red rectangular border.

Address Change Request – Update or add the address in the appropriate **Primary Address** and/or **Statement Address** fields and click **Submit**.

Address And Phone Change

Cardholder Details/Account Number: BL ACCT 0000024-10000000 (5020)

Request Type: Address Change

Primary Address

Address Line 1: Address, Address Line 2: Address, Address Line 3: Address

City: Address, State Province: , Postal Code: Address

Foreign Address: ☐

Statement Address same as Primary Address: ☐

Statement Address

Address Line 1: Address, Address Line 2: Address Line 2, Address Line 3: Address Line 3

City: City, State Province: , Zip Code: Zip Code

Foreign Address: ☐

Submit Cancel

Address and Phone Change Request – Update and/or add the new phone number and address. Click **Submit**.

Address And Phone Change

Cardholder Details/Account Number: BL ACCT 0000024-10000000 (5020)

Request Type: Address And Phone Change

Primary Address

Address Line 1: Address, Address Line 2: Address, Address Line 3: Address

City: Address, State Province: , Postal Code: Address

Foreign Address: ☐

Statement Address same as Primary Address: ☐

Statement Address

Address Line 1: Address, Address Line 2: Address Line 2, Address Line 3: Address Line 3

City: City, State Province: , Zip Code: Zip Code

Foreign Address: ☐

Phone Number

Home Phone: Home Phone, Business Phone: Business Phone, Mobile Phone: Mobile Phone

Other Phone: Other Phone

Submit Cancel

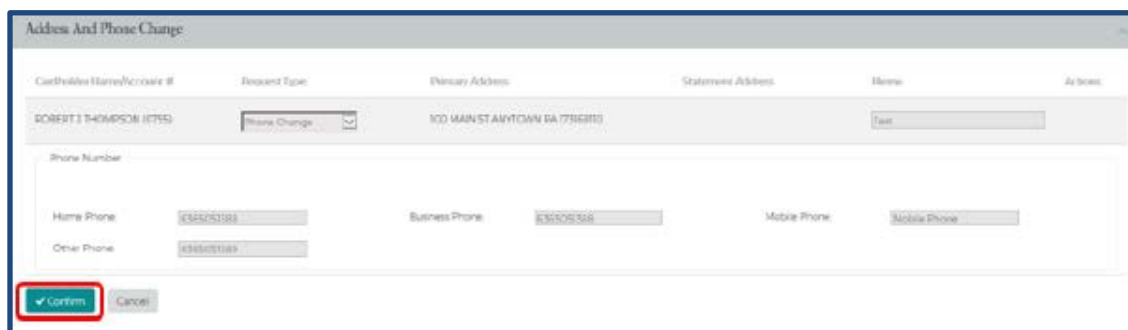
Important:

Primary Address – Cardholder address used for all correspondence, cards, and statements (unless a separate statement mailing address is provided). This is also the zip code used to authenticate for zip code verifications when authorizing a card transaction.

Statement Address - Used only if you want the statement to go to a different address than other correspondence, such as a bookkeeper who is responsible for paying bills.

Home Phone – This is the cardholder’s primary phone number. Cardholder’s mobile telephone number should be input into the **Home Phone** field. This is the telephone number that will be called if there is suspected fraud/fraud alerts on a card.

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



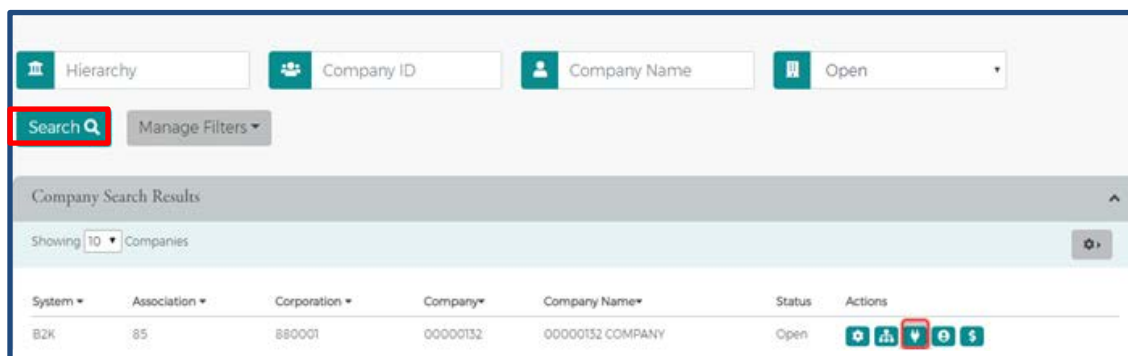
6. The Successfully Submitted screen will display.



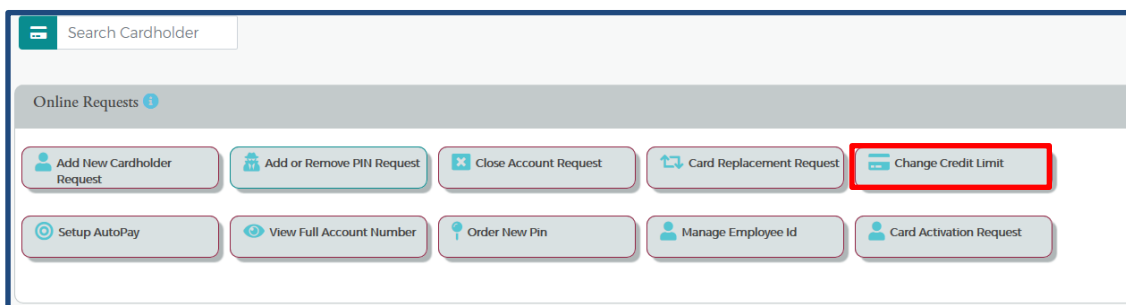
Change Credit Limit

The **Change Credit Limit** online request allows you to increase or decrease in 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.

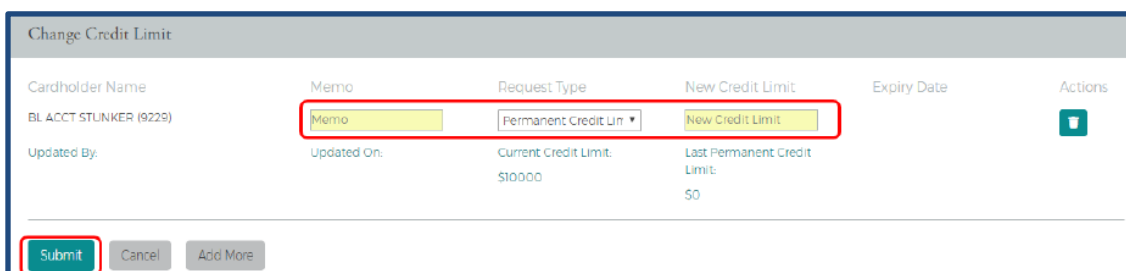


- From the **Online Requests** screen, select **Change Credit Limit**.



The screenshot shows the 'Online Requests' screen. At the top is a 'Search Cardholder' input field. Below it is a section titled 'Online Requests' with a blue information icon. There are two rows of buttons. The first row contains: 'Add New Cardholder Request', 'Add or Remove PIN Request', 'Close Account Request', 'Card Replacement Request', and 'Change Credit Limit' (which is highlighted with a red border). The second row contains: 'Setup AutoPay', 'View Full Account Number', 'Order New Pin', 'Manage Employee Id', and 'Card Activation Request'.

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



The screenshot shows the 'Change Credit Limit' form. It has a table-like structure with the following fields:

Cardholder Name	Memo	Request Type	New Credit Limit	Expiry Date	Actions
BL ACCT STUNKER (9229)	<input type="text" value="Memo"/>	<input type="text" value="Permanent Credit Lim"/>	<input type="text" value="New Credit Limit"/>		
Updated By:	Updated On:	Current Credit Limit: \$10000	Last Permanent Credit Limit: \$0		

At the bottom, there are three buttons: 'Submit' (highlighted with a red border), 'Cancel', and 'Add More'.

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

It is suggested to add one extra day to the date you want the temporary credit limit to expire to ensure the temporary credit limit is valid through the specified 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 Admin. The credit limit will return to the previously-established credit limit at the specified date. In contrast, a permanent credit limit increase will remain in effect until changed by a Company Admin.

- 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.

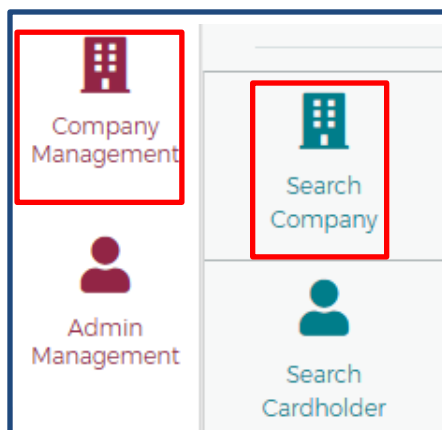
Alerts

The **Company Alert** feature provides Company Admins with timely information regarding the credit card program. Admin users have the ability to create, enable, disable, and delete company alerts.

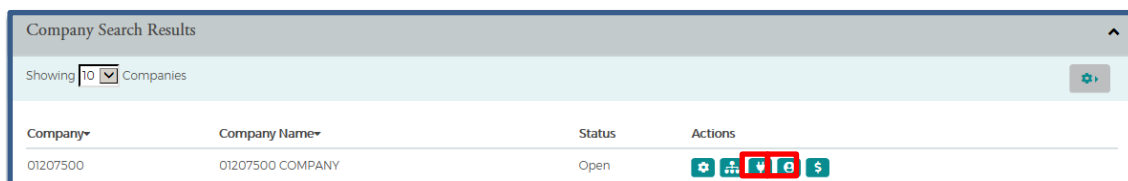
Note: Company Admins are able to set up company level alerts. Admins who have company sublevel restrictions do not have the option to set up company level alerts but do have access to the personal reminder alerts.

Company Alert Navigation

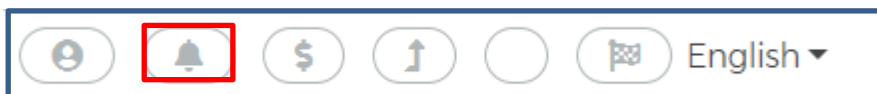
1. From the **Home** page, click **Company Management > Search Company**.



2. Click the **Online Request** or **Account List** icon.



3. From the **Online Request** or **Account List** page, click the **Alert** icon.



Note: The **My Alerts** page lists alerts already added.

Search Company / Company Alerts ⓘ

My Alerts Set Company Alerts Set Account Alerts

Alert Name Cardholder Name Last4 or 16 digit acct All

Search Manage Filters

Alert List

Showing 10 Alerts.

Alert Name	Alert Type	Last Sent	Enabled	Action
No Record Exists				

Creating Company Alerts

To create new company alerts:

1. From the **Company Alerts** page, click **Set Company Alerts**.

Search Company / Company Alerts ⓘ

My Alerts Set Company Alerts Set Account Alerts

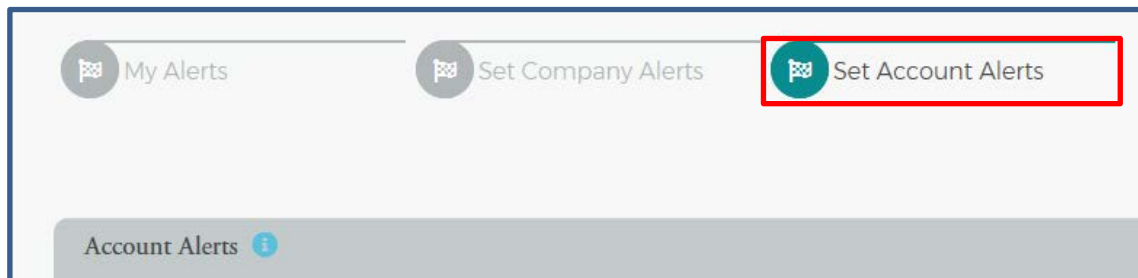
2. Once the **Company Alerts** page displays, perform any the following tasks and click **Add**:
 - Select alert(s)
 - Enter variable data
 - Select the Admins that should be alerted

The screenshot shows the 'Company Alerts' configuration page. It features a header 'Company Alerts' with an information icon. Below is a section titled 'Alert Types' containing two columns of toggle switches for various alert conditions: 'Available Balance Drops Below \$X', 'Current Balance Owed Drops Below \$X', 'Current Balance Owed Exceeds \$X', 'Current Balance Owed is Within \$X of Credit Limit', 'Cash Limit Reached Or Exceeded', 'Credit Limit Reached Or Exceeded', 'Payment Account Locked in eZBusiness', 'Payment Account Unlocked in eZBusiness', and 'Statement Available Alert'. There is also a 'Company Personal Reminder' section with a toggle for 'Send an alert on (mm/dd/yyyy)'. Below these are two input fields: 'Send Copy to additional admin' with a dropdown menu labeled 'Enter/Select admin', and 'Email Address' with the text 'Dennis.Mousel@midfirst.com'. At the bottom right, there are 'Add' and 'Close' buttons, with the 'Add' button highlighted by a red rectangle.

Creating Account Alerts

To create new account alerts, perform the following steps:

1. From the **Company Alerts** page, click **Set Account Alerts**.



2. Perform any of the following tasks and click **Add**:
 - Select alert(s)
 - Enter variable data
 - Select the Admins that should be alerted

eZBusiness Admin User Guide

The screenshot shows the 'Account Alerts' configuration window. At the top, there's a header 'Account Alerts' with a blue information icon. Below it, the 'Alert Types' section contains two columns of toggle switches. The left column has four toggles: 'Available Balance Drops Below \$', 'Current Balance Owed Drops Below \$X', 'Current Balance Owed Exceeds \$X', and 'Current Balance Owed is Within \$X of Credit Limit'. The right column has three toggles: 'Cash Limit Reached Or Exceeded', 'Credit Limit Reached or Exceeded', and 'Past Due'. Below these toggles is a text input field labeled 'CardholderName/Account' with a 'Select Cardholder' button. To the right of this is a 'Send Copy to additional admin' section with an 'Enter/Select admin' button. Further right is an 'Email Address' field containing 'Dennis.Mousel@midfirst.com'. At the bottom right, there are 'Add' and 'Close' buttons.

Account Alerts ⓘ

Alert Types

- ☐ Available Balance Drops Below \$
- ☐ Current Balance Owed Drops Below \$X
- ☐ Current Balance Owed Exceeds \$X
- ☐ Current Balance Owed is Within \$X of Credit Limit
- ☐ Cash Limit Reached Or Exceeded
- ☐ Credit Limit Reached or Exceeded
- ☐ Past Due

CardholderName/Account

Select Cardholder

Send Copy to additional admin

Enter/Select admin

Email Address

Dennis.Mousel@midfirst.com

Add Close

Note: Alerts that notify the Admin about current balance, credit limit, cash limit, and available balance are produced only when the company first qualifies for an alert. When the condition is met and no longer qualifies for the specific variables set in the alert, the alert is reset. Once the alert is reset, the company is eligible for the alert again. If additional Admins are copied on the alert, the alert is always sent to the primary email address for those users.

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