



eZBusiness Account Administrator Setup Form

Instructions: Complete one form per Account Administrator. Provide completed form to your Advisor for processing. All fields are required.

Business Details

Membership #: _____ **Business Name:** _____

Account Administrator Details

The individual who you authorize to administer the Account, including but not limited to requesting Cards, canceling Cards, changing credit limits, and otherwise administering the Account via eZBusiness.

First Name: _____ **Middle Name:** _____ **Last Name:** _____

Date of Birth: _____, _____ **Email Address:** _____

Phone Number: _____ **Ext:** _____ **Alt Phone Number:** _____ **Ext:** _____

Signature of Account Administrator: _____

Administrator Role (select all that apply apply): Refer to eZBusiness Administrator Roles document attached

Company Security Administrator Company Full Administrator Company Basic Administrator

I authorize the above individual to administer the Account, including but not limited to requesting Cards, canceling Cards, changing credit limits, and otherwise administer the Account via eZBusiness.

1. **Signature of Authorized Officer:** _____

Name: _____ **Title:** _____ **Date:** _____, _____

2. **Signature of Authorized Officer:** _____

3. **Name:** _____ **Title:** _____ **Date:** _____, _____

4. **Signature of Authorized Officer:** _____

5. **Name:** _____ **Title:** _____ **Date:** _____, _____

The Account Administrator's username and temporary password will be emailed separately to the email address provided above within 5 business days. If the username is not received, an Authorized Officer of the business can contact us at 1-866-592-2226 option 4.

eZBusiness Administrator Roles

Company Security Administrator

This Company Security Administrator role contains company level access and audit focused security rights. Companies are responsible for managing (e.g., adding, removing, modifying) their admin users. This role contains the necessary rights to perform such security management tasks at the company level. See below for a full list of security rights included in this role.

Admin Management Security Rights:

- View Admin Users List
- Manage Admin User
- Search Admin Logins
- Search for Admin Users
- Create New Admin User
- Modify Admin User
- Change Admin User Password
- Reset Admin User Failed Logins
- Delete Admin User
- Emulate Admin User
- Delete Admin User Security Account
- Unlock Admin User Security Account
- View Security Profile/Role List

Company Full Administrator

This Company Full Administrator role contains cardholder and payment focused security rights, along with access to manage service requests in real time. This role is designed for company admins that would assist and manage employees, make payments, access company data (e.g., transaction details, card authorizations, and statement data), communicate company announcements via company messaging, and respond to online service requests and messages. See below for a full list of security rights included in this role.

Company Management Security Rights:

- Company Search
- View Company Hierarchy
- Payments
- Manage Company Alerts
- Manage Payment Accounts
- Search Company Cardholders
- Compose Company Messages

Cardholder Management Security Rights:

- Change the Cardholder Email
- Delete Cardholder User
- Enroll Cardholder User
- Lock Cardholder Account
- Delete Cardholder's Security Account
- Generate New Cardholder Password
- Lock Cardholder User
- Reset Cardholder User Authentication Failures
- Reset Cardholder User Login Failures
- Unlock User Security Account
- Emulate Cardholder User
- View Statement Image

Online Service Requests Security Rights:

- View Full Account Number
- Address and Phone Change
- Change Credit Limit
- Close Account
- Add New Cardholder Account
- Request Replacement Card
- Manage Employee ID
- Card Activation Request
- Order New PIN

Online Messages Security Rights:

- Account Inquiry
- Program Inquiry
- Online Support Question (How do I?)
- Other Inquiry
- Report a Website Issue
- Transaction Inquiry

Company Basic Administrator

This Company Basic Administrator role contains cardholder and payment focused security rights. This role is designed for company admins that would assist and manage employees, make payments, access company data (e.g., transaction details, card authorizations, and statement data), and communicate company announcements via company messaging. See below for a full list of security rights included in this role.

Company Management Security Rights:

- Company Search
- View Company Hierarchy
- Payments
- Manage Payment Accounts
- Search Company Cardholders
- Compose Company Messages

Cardholder Management Security Rights:

- Change the Cardholder Email
- Delete Cardholder's Security Account
- Delete Cardholder User
- Enroll Cardholder User
- Generate New Cardholder Password
- Lock Cardholder Account
- Lock Cardholder User
- Reset Cardholder User Authentication Failures
- Reset Cardholder User Login Failures
- Unlock User Security Account
- Emulate Cardholder User
- View Statement Image