



eZBusiness Card Management

Administrator User Guide



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Getting Started in eZBusiness

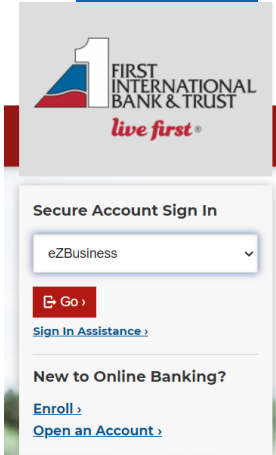
Username and Temporary Password

You will receive two emails from noreply@eZBusinesscardmanagement.com. Each of the emails will contain either your Username or Temporary Password.

Setting up your password and security account

To log into eZBusiness Card Management, perform the following steps:

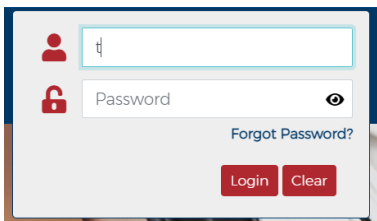
1. Go to www.FIBT.com and select eZBusiness from the Secure Account Sign In box, then select Go.



2. From the eZBusiness landing page, enter your Username.



3. As you begin typing your Username, the Password field displays. Enter your temporary Password and click Login.



4. Once you enter your Username and Password, the Change Password window will be displayed. Enter your Current Password, New Password and click Submit.
5. Next, you will be prompted to set up your security questions.

Login Authentication

Each time you log into eZBusiness, login authentication is performed. If the system detects a difference, you will be challenged using Out of Band Authentication.

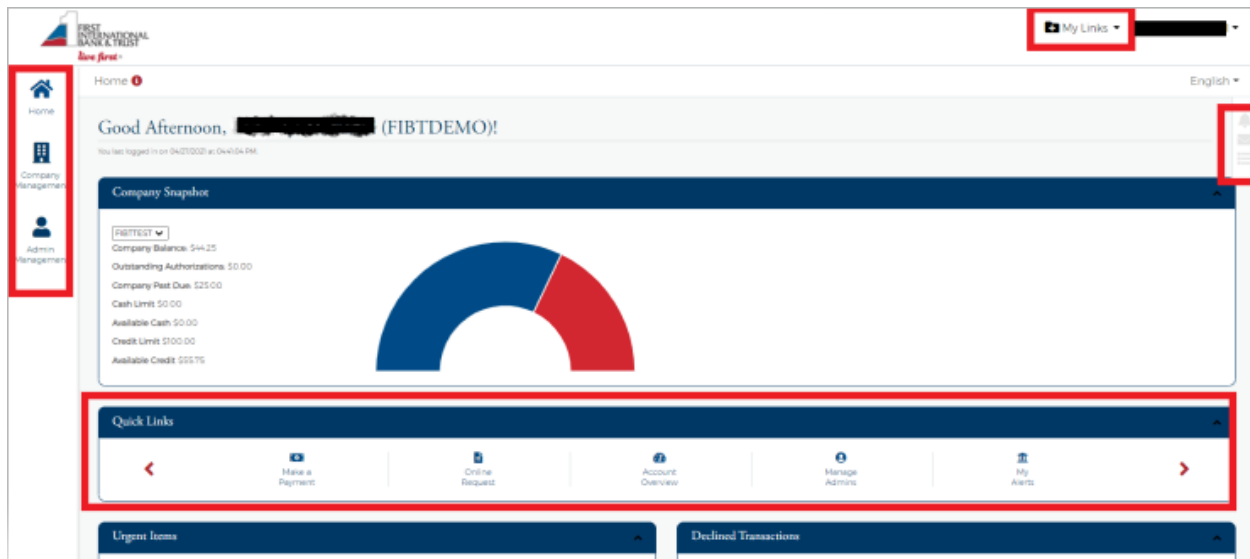
Out of Band Authentication is a form of authentication that sends a one-time security code to the user by way of a phone call, text or email. Out of band authentication is required when the user fails login authentication.

General eZBusiness Navigation

IMPORTANT!

➔ Depending on your security rights, you may or may not see all the options shown in this guide.

Home Page Overview



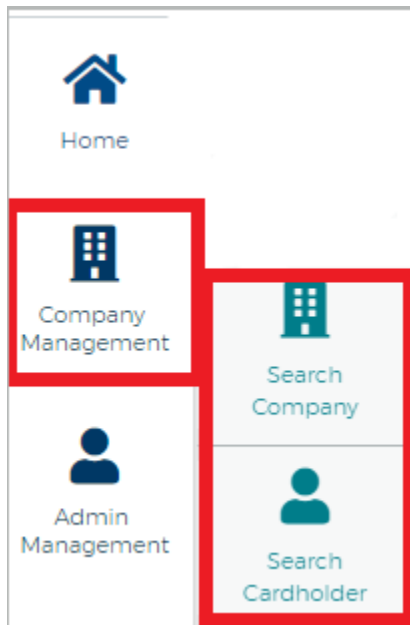
The table below describes the elements of the **Home** page:

Element	Description
Side Navigation Bar	Link to the modules within eZBusiness that you have access to.
Links	There are two quick link options on the home page: ➔ A drop-down list at the top of the page ➔ A Quick Links section in the middle of the page.
Company Snap Shot	Provides a snapshot of company's financial status.
Urgent Items	Provides information related to items that require immediate attention
Declined Transactions	Provides information related to Declined Transactions related to the company.
Company Activity	Provides a snapshot of company activities.

Element	Description
Alerts / Important Information	The Alert icon on the right side of the home page displays important information that requires action.
Messages	The Message icon on the right side of the home page displays if you have any unread Messages.
To-Do List	Provides the user with the ability to create a list of tasks to be completed.

Accessing Pages Within eZBusiness

The left-hand side menu is used to navigate to various functionalities within the site. The icons that you see in the menu are based on your security rights. Click on an icon and a list of sub-menu icons display allowing you to navigate to pages to perform different functions.

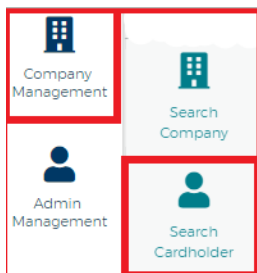


Account Management

Cardholder Account Search

To search for a cardholder in **Account Management**, perform the following steps:

1. Click the **Account Management** icon and then the **Search Cardholder** icon.



- The **Search Cardholder** page is displayed. Enter one or any combination of search options and click **Search**.

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 list.

- The **Cardholder Search Results** section is displayed.

The table below describes the search elements available on the **Search Cardholder** page.

Element	Description
Hierarchy	Hierarchy level
First Name	Cardholder's first name.
Last Name	Cardholder's last name.
User Name	Cardholder account user-defined name
Account Number	When searching by account number, you must enter the full 16-digit or last 4 of the credit card number.
Phone Number	Cardholder's phone number
Social Security Number	Cardholder's Social Security number.
Email Address	Cardholder's Email address on file in MyCardStatement

The below table describes the icons available in the **Cardholder Search Results** section:

Icon	Description
	Emulate the cardholder
	View Cardholder Details page
	Download

Downloading Lists

Some lists within eZBusiness can be downloaded. You can download the search results to the following formats:

- Excel/Spreadsheet (.csv) format
- Excel
- Text (tab spacing) format

To download search results, perform the following steps:

1. Click the Export icon.



2. The export options will be displayed. Click the format option that you want and save the file to a specified location on your computer.



Cardholder Profile











You can view the cardholder's contact information in the **Cardholder Profile** section. There are also links to:

- View Payment Activity
- View Association Accounts
- View Statements
- View Online Request Activity

Cardholder User Enrollment Details

The **User Enrollment Details** section displays the User Enrollment Status in MyCardStatement, User Account Status, and User Profile Status when the **Cardholder Details** page displays.






User Enrollment Details	
User Enrollment Status / Activity:	Enrolled
User Account Status(Locked / Unlocked):	Unlocked
User Profile Status(Locked / Unlocked):	Unlocked
More	











User Enrollment Details			
Activity	Status	Last Activity Date	Actions
User Enrollment Status / Activity	Enrolled	04/27/2021	  
User Security Status (RSA)	Enrolled	05/14/2021	  
Security Inactivity Lock	No	06/02/2021	
Password Failures / Generate New Password	0	05/14/2021	
User Account Status(Locked / Unlocked)	Unlocked		
User Profile Status(Locked / Unlocked)	Unlocked		
Allow Cardholder Payments	UnBlocked	02/04/2021	
Last Activity	N/A		

The below table describes the elements of the **User Enrollment Details** Section:

Element	Description
User Enrollment Status / User Activity	Status of the user's enrollment in MyCardStatement. Allows you to delete the user link and enroll the cardholder.
Failed Enrollment Attempt	Displays the number of failed enrollment attempts and allows you to reset, if needed.
User Security Status (RSA)	Displays the status of the user's security account and allows you to delete the user's security account, lock/unlock the security account and view the user's security history.
User Account Status (Locked / Unlocked)	Displays the status of the user's account and allows you to lock and unlock the account.
User Profile Status (Locked / Unlocked)	Displays the user's status and allows you to lock and unlock the account.
Security Inactivity Status	Displays the user's inactivity status and allows you lock and unlock the user's account and view activity.
Password Failure / Generate New Password	Displays the number of password failures
User Enrollment Status (Only ID)	Shows if the cardholder is enrolled in Only ID. <i>You will only see this option if you are enrolled in Only ID.</i>
User Lock Status (Only ID)	Displays the status of the user's Only ID log in account. <i>You will only see this option if you are enrolled in Only ID.</i>

From the expanded **User Enrollment Details** section, you can perform additional actions by clicking on the icons:

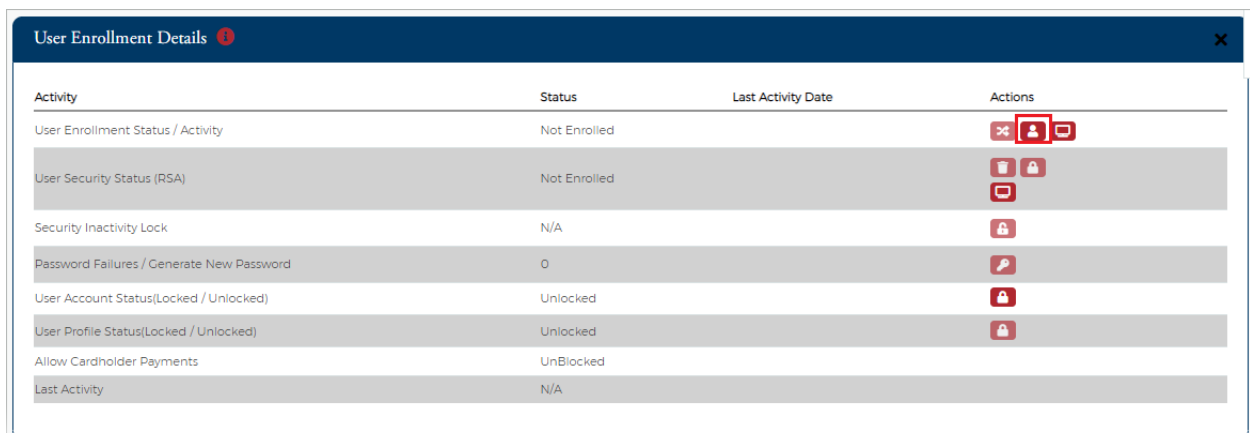
Icon	Description
User Enrollment Status / User Activity	
	Delete User Link – Icon only appears if the user is enrolled
	Enroll cardholder
	View Activity Summary
Failed Enrollment Attempts	
	Reset
User Security Status	
	Delete the user's security account











Icon	Description
	Lock/Unlock the user's security account
	View the user's security account history
User Account Status	
	Lock/Unlock the user's account
	
User Profile Status	
	Lock/Unlock the user's account
	
Security Inactivity Lock	
	Lock/Unlock the user's account
	
	View Activity Summary
Password Failures	
	Generate password

Enrolling a Cardholder in MyCardStatement

To enroll a cardholder in MyCardStatement, perform the following steps:

1. From the **Cardholder Details** page, click the **More** button in the **User Enrollment Details** section to display additional enrollment details.
2. Click on the **Enroll** icon in the **User Enrollment Status** row.



User Enrollment Details			
Activity	Status	Last Activity Date	Actions
User Enrollment Status / Activity	Not Enrolled		  
User Security Status (RSA)	Not Enrolled		  
Security Inactivity Lock	N/A		
Password Failures / Generate New Password	0		
User Account Status(Locked / Unlocked)	Unlocked		
User Profile Status(Locked / Unlocked)	Unlocked		
Allow Cardholder Payments	UnBlocked		
Last Activity	N/A		

3. The **Enroll User** screen is displayed. Complete all the fields and click **Confirm**.

Locking a User and/or Account

To lock a user's account, perform the following steps:

1. From the **Cardholder Details** page, click the **More** button in the **User Enrollment Details** section to display additional enrollment details.
2. Click on the **Lock** icon in the **User Account Status** row.

Activity	Status	Last Activity Date	Actions
User Enrollment Status / Activity	Not Enrolled		
User Security Status (RSA)	Not Enrolled		
Security Inactivity Lock	N/A		
Password Failures / Generate New Password	0		
User Account Status(Locked / Unlocked)	Unlocked		
User Profile Status(Locked / Unlocked)	Unlocked		
Allow Cardholder Payments	UnBlocked	02/04/2021	
Last Activity	N/A		

3. When you click on the **Lock** icon to lock a user, a box displays to enter the **Reason** that you are locking the account. Select the reason from the drop-down list and click the **checkmark**.

4. A message will display stating the account has been locked.

Unlocking a User and/or Account

A user can get locked out by an administrator using the steps above or by failing to enter their password correctly after three attempts. You can unlock a user or an account from the **Account Details** page.

To unlock an account, perform the following steps:

1. From the **Cardholder Details** page, click the **More** button in the **User Enrollment Details** section to display additional enrollment details.

2. Click on the **Unlock** icon in the **User Account Status** row.
3. A message will display stating the account has been unlocked.

Resetting a Password

If the cardholder requires a new password, a temporary password can be automatically generated and sent to the cardholder's email address.

To generate a new password, perform the following steps:

1. From the **Cardholder Details** page, click the **More** button in the **User Enrollment Details** section to display additional enrollment details.
2. Click on the **Generate Password** icon in the **Password Failure** row.



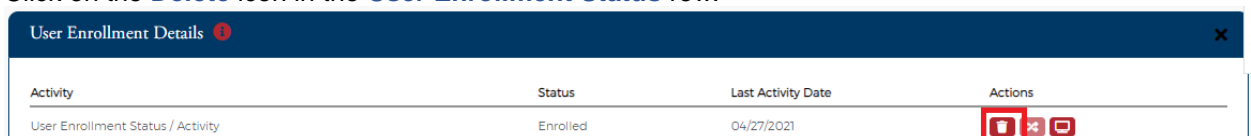
3. A message will appear stating a new password was generated.

Deleting a Cardholder from MyCardStatement

You can delete a cardholder from the MyCardStatement using the **Account Details** page. Please note that this does not delete the cardholder from the mainframe system. If the cardholder wants to access the system after they have been deleted, they would be required to enroll again or be enrolled using the manual enrollment process outlined below.

To delete an account from MyCardStatement, perform the following steps:

1. From the **Cardholder Details** page, click the **More** button in the **User Enrollment Details** section to display additional enrollment details.
2. Click on the **Delete** icon in the **User Enrollment Status** row.







Locking/Unlocking a User's Security Account

A cardholder can get locked out of their Security Account due to failing to answer security questions correctly. Once logged in, you may lock or unlock a cardholder in their Security Account through the **Account Details** page.

To lock or unlock a **User's Security Account**, perform the following steps:

1. From the **Cardholder Details** page, click the **More** button in the **User Enrollment Details** section to display additional enrollment details.
2. Click on the **Lock** or **Unlock** icon in the **User Security Account Status** row. A message will display stating the account was successfully locked/unlocked.

The below table describes the icons available for **User Security Account Status**:

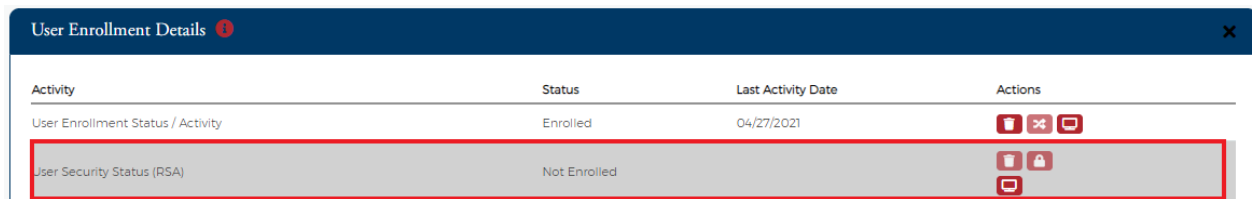
Icon	Description
	Delete the user's security account
	Lock/Unlock the user's security account
	Lock/Unlock the user's security account
	View the user's security account history

Deleting a User's Security Account

If the Cardholder has forgotten all their security questions, they can be deleted from their Security Account. This allows them to log in again and create a new Security Account profile. Once logged in, customer service representatives may delete the Security Account.

To delete a **User's Security Account**, perform the following steps:

1. From the **Cardholder Details** page, click the **More** button in the **User Enrollment Details** section to display additional enrollment details.
2. Click on the **Delete** icon in the **User Security Account Status** row.







3. A message will be displayed asking if you are sure you want to delete RSA Enrollment for the user.

Note: The cardholder is asked to set up a Security Account the next time they log into MyCardStatement after this step.

Company Management

Company Search Actions

The below table describes the icons available in the **Company Search** section:

Icon	Description
	Configure – online account actions
	Hierarchy - the accounts associated with your access
	Online Requests – self admin requests
	Account List – list of all cards under account



Adding a Payment Account

To add a payment account in **Company Management**, perform the following steps:

1. Click the **Company Management** icon and then the **Search Company** icon.



2. The **Company list** is displayed. Select the payments icon on the line of the company you want to pay.

Actions



3. Select the **Add New** icon.

Payment Accounts				
Account Nickname	Account Type	Account Number	Routing Number	Status
				+ Add New

4. Complete the required payment fields and select the **Save** icon.

Payment Accounts ⓘ				
Account Type: <input type="text"/>	Financial Inst Name: <input type="text"/>	Name on Account: <input type="text"/>	Routing Number: <input type="text"/>	Account Number: <input type="text"/>
Account Nickname: <input type="text"/>				
				Save Cancel

Making a Payment (multiple options)

To make a payment in **Company Management**, perform the following steps:

1. Click the **Company Management** icon and then the **Search Company** icon.

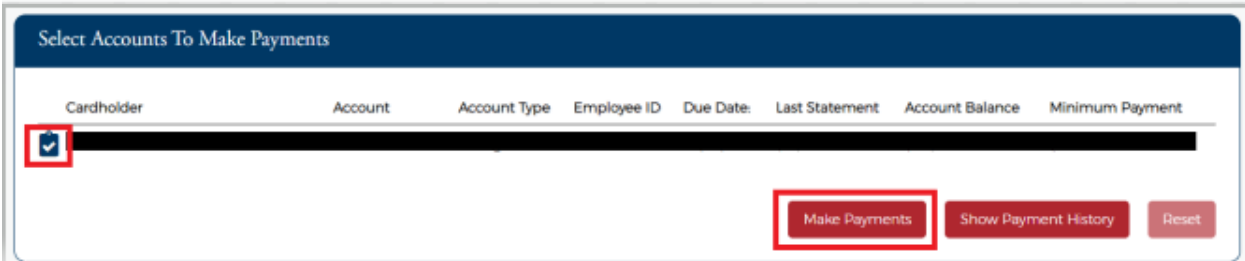
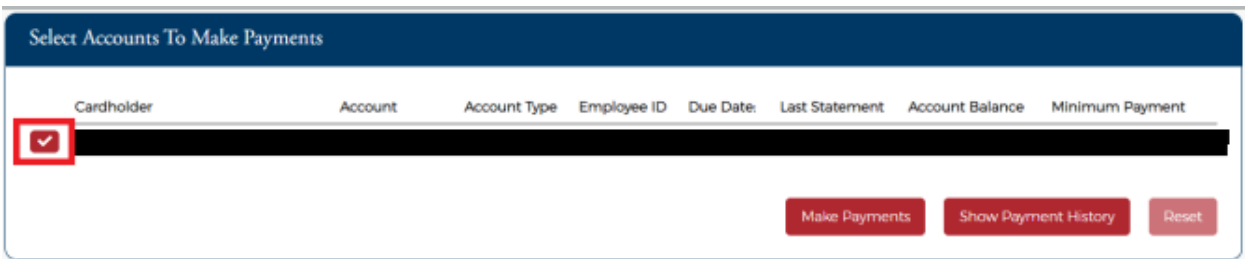


- The **Company list** is displayed. Select the payments icon on the line of the company you want to pay.

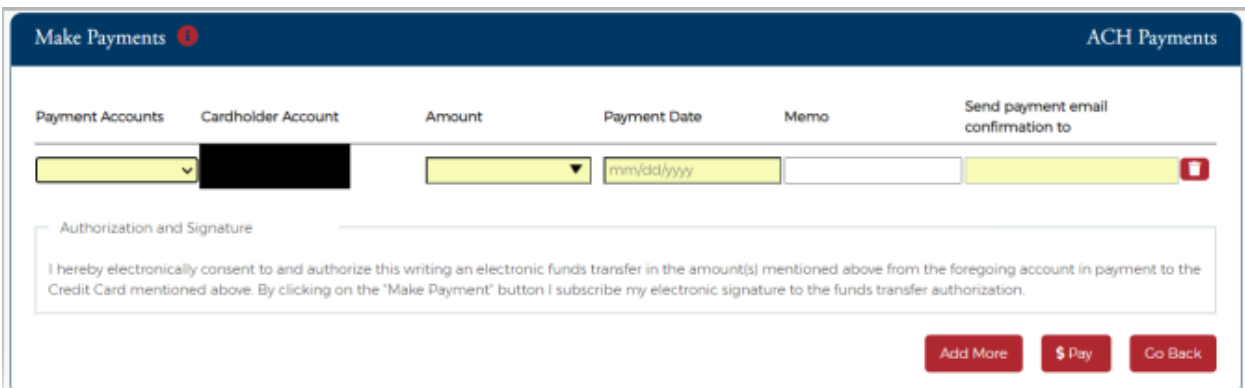
Actions



- To make a payment select an account to add to the payment cart and then select the **Make Payments** icon. The box will change from red to blue once it's in the payment cart.

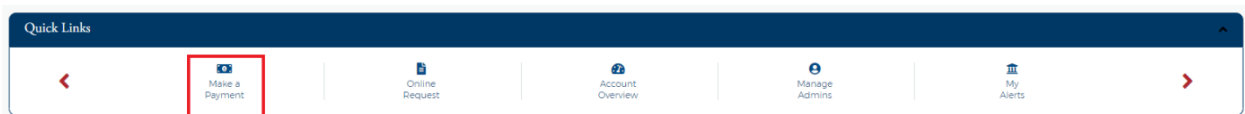


- The **Make Payments** page is displayed. Complete the required payment fields and select the **Pay** icon.



To make a payment from the **Home Page**, perform the following steps:

- Click the **Make a Payment** icon and then select the account you wish to make a payment to.



For accounts set up on individual bill, this is a great option to make payments to multiple cards at once.

2. Continue with the payment steps shown above.

To make a payment in **Company Management**, perform the following steps:






1. Click the **Company Management** icon and then the **Search Company** icon.
2. Select the **Payment** icon on the top menu bar.



3. Continue with the payment steps shown above.

Account List Actions

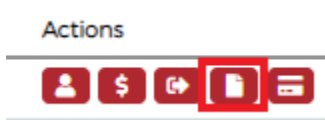
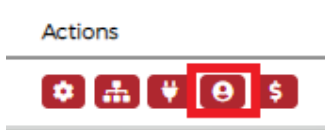
The below table describes the icons available in the **Account List** section:

Icon	Description
	Emulate– view the users online access
	Make a Payment
	Authorizations – pending transactions
	Statements
	View Transactions

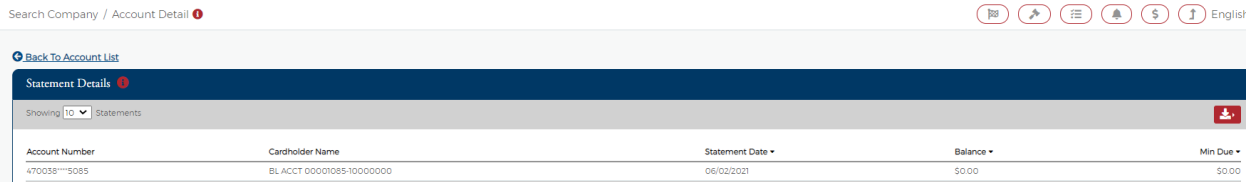
View Statements

To view statements in **Company Management**, perform the following steps:

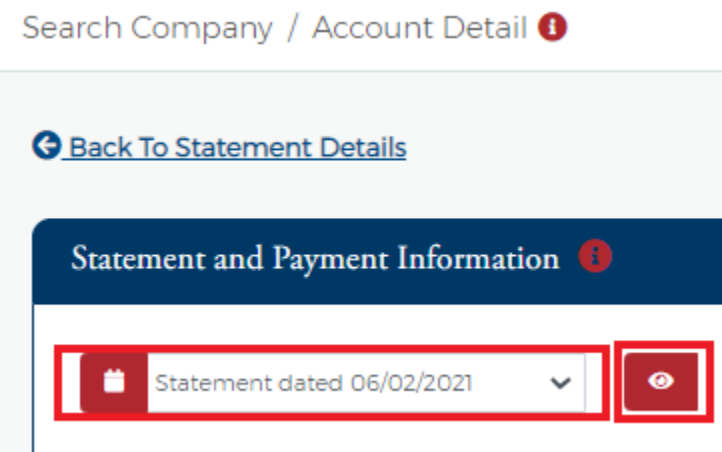
1. Click the **Account List** icon and then the **Statements** icon.



2. Under the **Statement Details** select the statement period that you would like to see.



3. Under the Statement and Payment Information, Click the **View Images** icon next to the statement date.



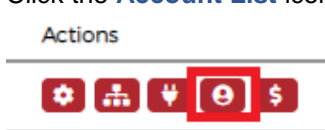
4. Click the **Statement** hyperlink to download statement.



Download/Export Transactions

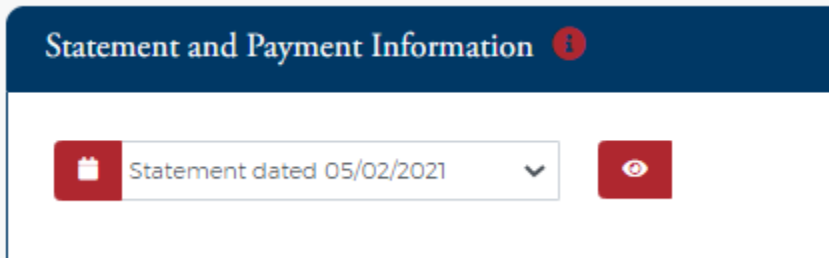
To view statements in **Company Management**, perform the following steps:

1. Click the **Account List** icon and then the **Transaction Details** icon.





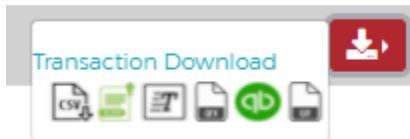
2. Under the **Statement and Payment Information** select the statement period that you would like to view.



3. Under the **Transaction Details**, Click the **Download Transactions** icon.



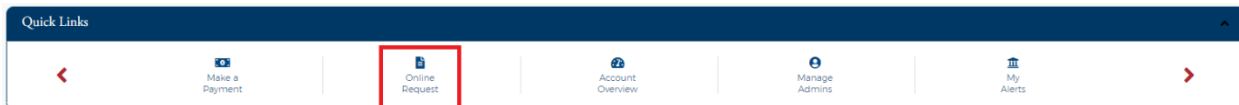
4. Under the **Download Transactions** icon, select the download option to download or export statement details.



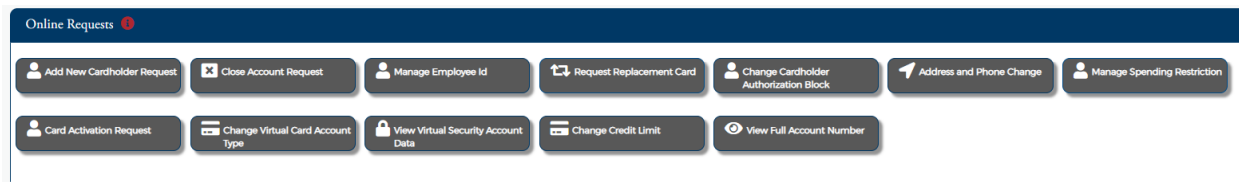
Online Requests

Online requests gives you the opportunity to self-manage your company's cards.

1. Click the **Online Requests** icon on the Home Page.



2. Select the icon of the task that you would like to complete and follow the next steps provided for each task.



eZBusiness Tutorial

For more detailed information on the functionality in eZBusiness please access the eZBusiness Tutorial using the link below:

[eZBusiness Tutorial](#)