


Quick Reference Guide – Company & User Profile Maintenance

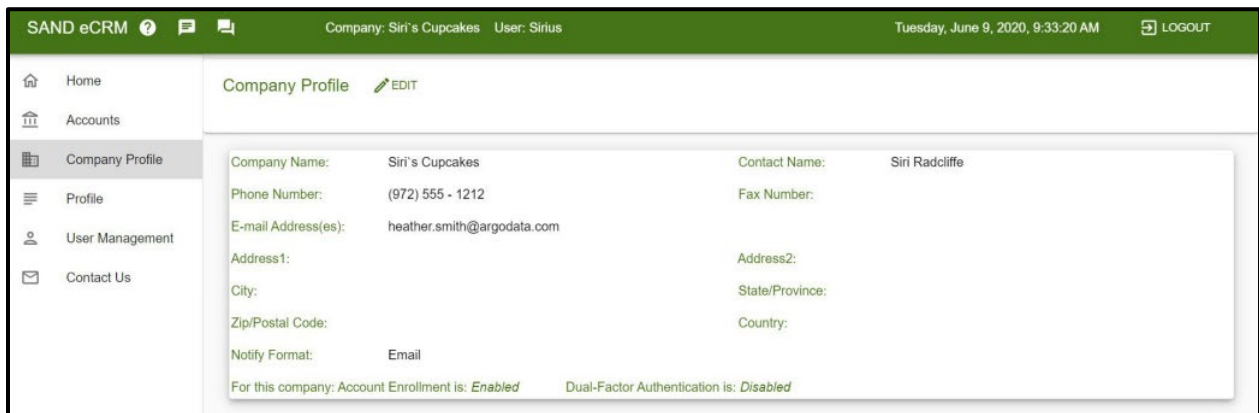
Company Profile Maintenance

Use the Company Profile tab to view and edit company information. At the bottom of the window, you can view whether account enrollment or dual factor authentication is enabled for the company.

Modifying Company Profiles

To modify the company profile:

1. Select  Company Profile from the left menu. The Company Profile window opens.

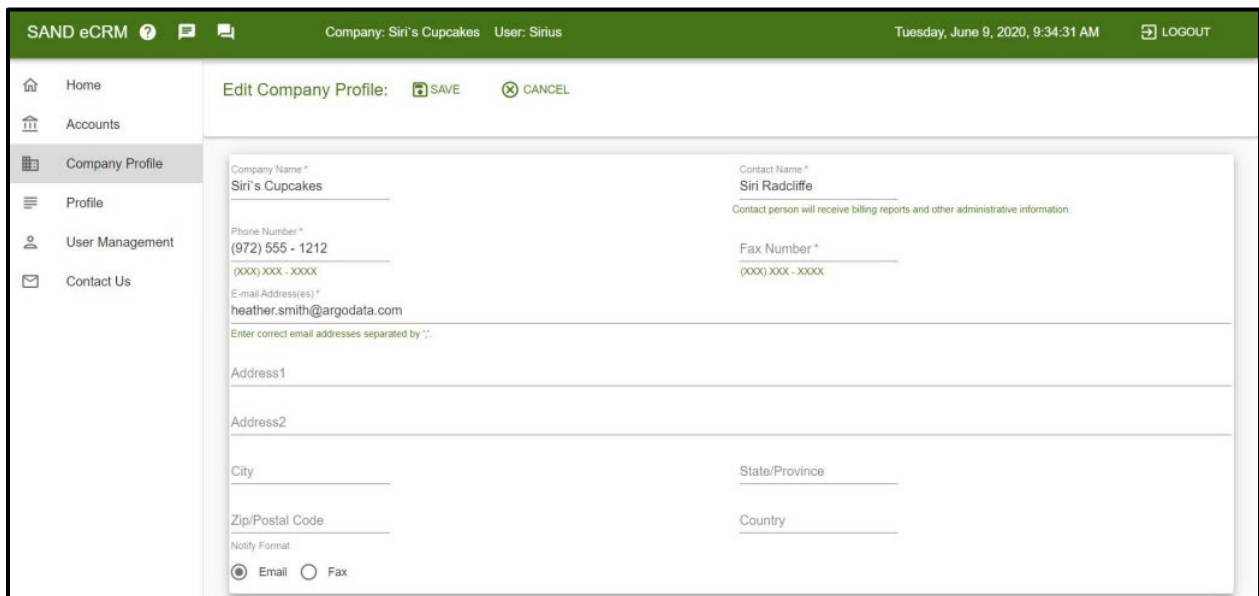


The screenshot shows the SAND eCRM interface. The top navigation bar includes 'SAND eCRM', a help icon, a chat icon, a notification icon, the company name 'Siri's Cupcakes', the user name 'User: Sirius', the date and time 'Tuesday, June 9, 2020, 9:33:20 AM', and a 'LOGOUT' button. The left sidebar contains a menu with 'Home', 'Accounts', 'Company Profile' (selected), 'Profile', 'User Management', and 'Contact Us'. The main content area is titled 'Company Profile' with an 'EDIT' link. It displays the following information:

Company Name:	Siri's Cupcakes	Contact Name:	Siri Radcliffe
Phone Number:	(972) 555 - 1212	Fax Number:	
E-mail Address(es):	heather.smith@argodata.com	Address2:	
Address1:		City:	
City:		State/Province:	
Zip/Postal Code:		Country:	
Notify Format:	Email		

At the bottom, it states: 'For this company: Account Enrollment is: *Enabled* Dual-Factor Authentication is: *Disabled*'

2. Click  EDIT. The Edit Company Profile window opens.




The screenshot shows the 'Edit Company Profile' form in SAND eCRM. The top navigation bar is the same as in the previous screenshot. The left sidebar is also the same. The main content area is titled 'Edit Company Profile:' with 'SAVE' and 'CANCEL' buttons. The form fields are as follows:

Company Name *	Siri's Cupcakes	Contact Name *	Siri Radcliffe
Phone Number *	(972) 555 - 1212	Fax Number *	
E-mail Address(es) *	heather.smith@argodata.com	Address1	
Address1		Address2	
City		State/Province	
Zip/Postal Code		Country	
Notify Format	<input checked="" type="radio"/> Email <input type="radio"/> Fax		

Additional text in the form includes: 'Contact person will receive billing reports and other administrative information.' and 'Enter correct email addresses separated by ";"

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3. [Optional] Modify any of the following information:
 - Company Name
 - Contact Name
 - Phone Number
 - Fax Number
 - Email Address(es)—The email to send the list of suspects for the day, which requires additional attention for item disposition. Separate additional emails with commas or semicolons.
 - Address1
 - Address2
 - City
 - State/Province
 - Zip/Postal Code
 - Country
 - Notify Format—Email.
4. Click  SAVE to update the profile and return to the Company Profile window.

User Profile Maintenance

The User Profile Maintenance section identifies the tasks and information needed to use Positive Pay Company. When using Positive Pay for the first time, ensure browser settings are safe and secure. After logging in to Positive Pay Company, change your password and profile information, if needed.

Logging in to Positive Pay Company

Before logging in to Positive Pay, the company administrator must create your user account with a username and password. When the company administrator creates your account, Positive Pay automatically sends you an email with your login information and a system-generated activation key. When you log in for the first time, you must create a new password and type the activation key sent in the email.

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To log in to Positive Pay Company:

1. From the browser, type the URL address of Positive Pay provided by your company administrator.

Login to SAND

User Name *

Password *

Company *

SUBMIT

[If you have forgotten your password, please contact your system Administrator to have it reset.](#)

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2. Type your User Name, Password, and the name of your Company.

NOTE: If you attempt to log in more than three times with the wrong password, Positive Pay disables your account.

3. Click SUBMIT. The Change Password window opens if you are logging into Positive Pay for the first time.
4. Type the following information:
 - Current Password—The password provided by the company administrator
 - New Password—The new password for your account
 - Confirm Password—Re-type the new password.


IMPORTANT: A password must be a minimum of eight characters long, and must contain at least one letter, one number, and one special character.

5. Click Done. The Activate window opens.

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6. In Activation Key, type the activation key provided in the email.
7. Click Save Activation Key. The Welcome window opens and displays application messages, custom messages, and the last time you logged in to Positive Pay.




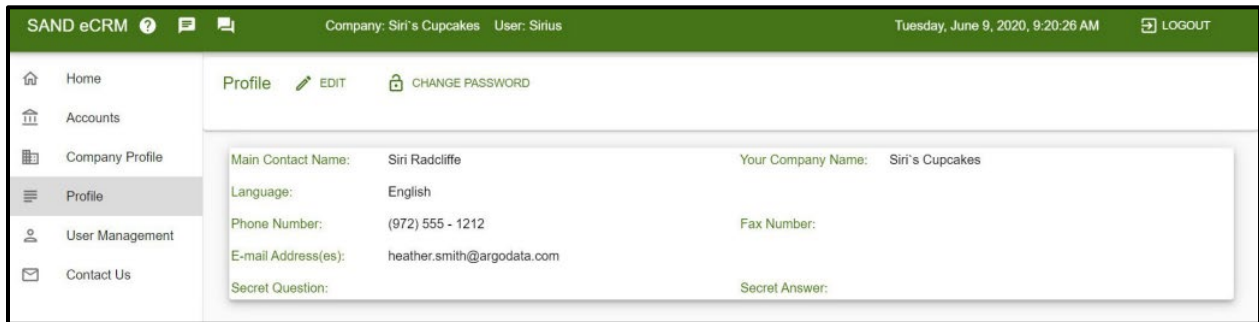
8. Click  CONTINUE. The Home tab for your company window opens.
9. Review your access to the Positive Pay tabs and windows.

NOTE: If you cannot access certain Positive Pay functions or windows, contact the company administrator.

Changing Your Password

To change your password:

1. Select  Profile from the left menu. The Profile window opens.




2. Click  CHANGE PASSWORD. The Change Password window opens.

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3. In Old Password, type your current password.
4. Type your New Password.

IMPORTANT: A password must be a minimum of eight characters and must contain at least one letter, one number, and one special character. Also, you cannot re-use a deprecated password before the defined re-use period, which is designated as one year by default.

5. In Confirm Password, retype the new password.
6. Click  SAVE to update the password and return to the Profile window.

IMPORTANT: If you forgot your password, notify the bank administrator to change and send a new Positive PayCompany password to your email address.

Modifying Your Profile


When creating your user account, a Positive Pay user with User Management permissions specifies your user name, phone number, and email address. After the user with permissions creates your account, you cannot change your user name; however, **you can change the following information:**

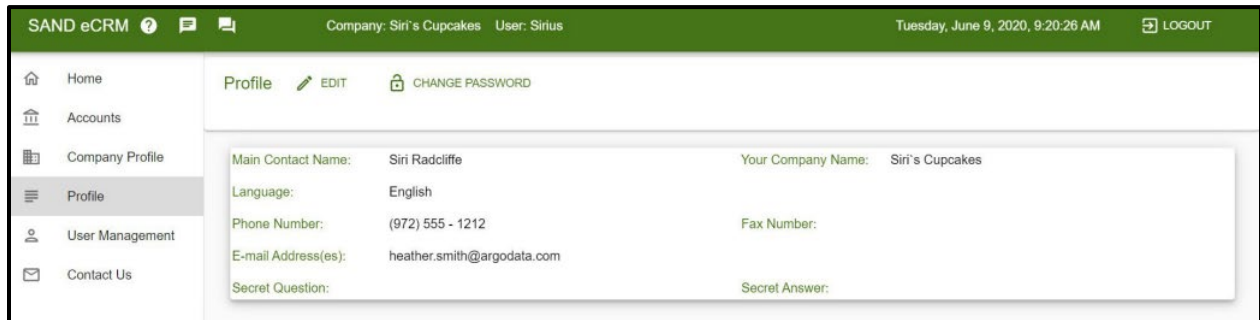
- Your telephone number
- Your fax number
- Your email address

NOTE: When you modify your profile, Positive Pay does not require you to change your password.

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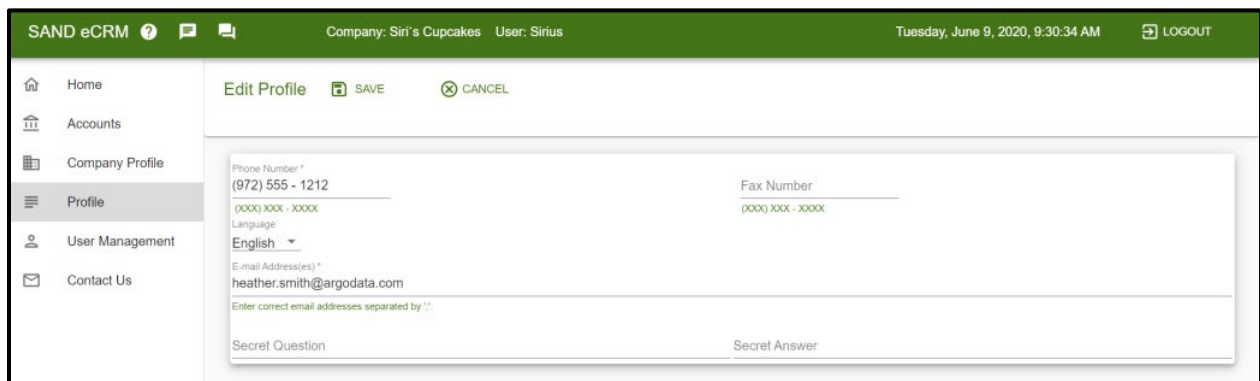
To modify your profile:

1. Select  Profile from the left menu. The Profile window opens.



Main Contact Name:	Siri Radcliffe	Your Company Name:	Siri's Cupcakes
Language:	English		
Phone Number:	(972) 555 - 1212	Fax Number:	
E-mail Address(es):	heather.smith@argodata.com		
Secret Question:		Secret Answer:	

2. Click  EDIT. The Edit Profile window opens.





Phone Number * (972) 555 - 1212 Fax Number (000) XXX - XXXX

Language English

E-mail Address(es) * heather.smith@argodata.com

Secret Question Secret Answer


3. Edit the following information as necessary:
 - Phone Number
 - Fax Number
 - Language—Select your preferred language for the user interface.
 - Email Address(es)
 - Secret Question—Type a question that is familiar to you. Positive Pay administrators ask this question to confirm your identity.
 - Secret Answer—Type the answer to the question. Positive Pay administrators use the answer to identify you.
4. Click  SAVE. A confirmation message opens.
5. Click  OK. The Profile window displays your changes.

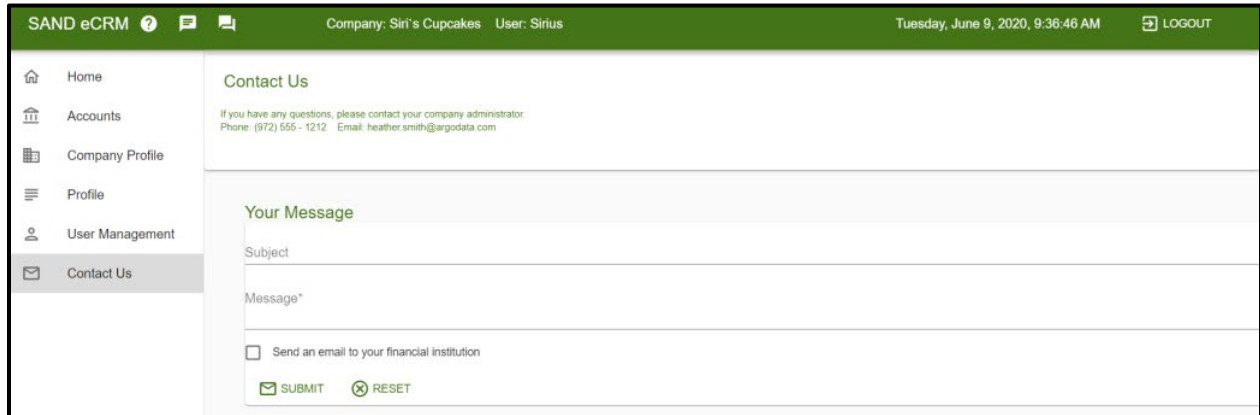
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Contacting Customer Support

Use the Contact Us tab to send an email to the company Positive Pay administrator for customer support questions.

To contact customer support:

1. Select  Contact Us from the left menu. The Contact Us window opens.



2. Enter the following information:
 - Send an email to your financial institution—Select this check box to also send an email to the Positive Pay Bank administrator.
 - Subject
 - Message
3. Click  SUBMIT. An information message opens.
4. Click  OK. Positive Pay sends the email to the first company user created for the company.

Logging Out of Positive Pay

BEST PRACTICE: When logging out, do not use the browser Close or Back buttons. Using these buttons causes your session to remain active.

To log out of Positive Pay:

- In the header, click  LOGOUT. The Login window opens.

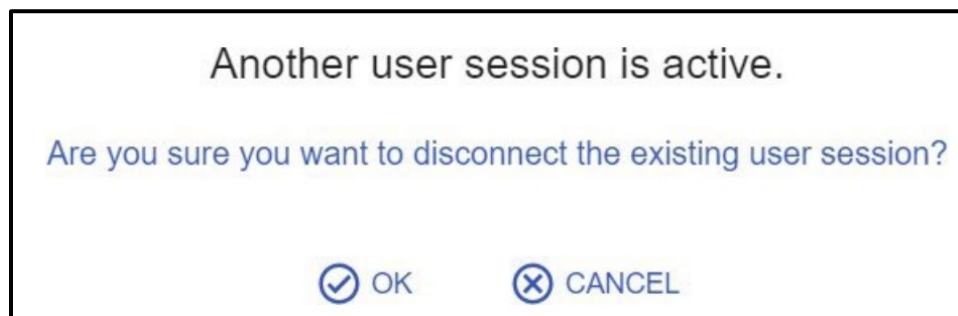
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Disconnecting User Sessions

If you accidentally close or leave your browser while logged in to Positive Pay, you can disconnect your existing session to log in again.

To disconnect a previous session and log in to Positive Pay:

1. From the Login tab, enter your user credentials, and then click SUBMIT. A confirmation message opens.



2. Click OK.
3. Click SUBMIT again to log in to Positive Pay.