

Managing Your Business Profile and Personalization

Receiving messages from Desjardins

The Messages to users page appears when Desjardins would like to notify AccèsD Affaires users of any technical improvements or important information.

When Desjardins sends a message, the page opens when you start your session. After you read it, you can continue in AccèsD Affaires by clicking on the **Continue** button.

You can return to the Messages to users page at any time by activating the Messages link in the menu.



View your business profile

Click on the **Business** tab for the menus describing various elements of your business profile.

Business profile

Click here to see the general information the caisse has about your business.

Services

See the services your business is registered for. A green check mark “” indicates that your business is registered and a red “” means that it is not.

Accounts

See the accounts (RS, LC, etc.) that are linked to your folio. This is also where you opt for, or opt out of receiving a virtual statement for your folio.

To obtain a monthly virtual statement of account:

1. Click the **Business** tab then **Accounts**.
2. Select the appropriate folio.
3. Click on the **Accounts in this folio** button.
4. Check the Obtain the monthly virtual statement button.
5. Click on **Confirm**.

DDW organizations

See information about your direct deposit-withdrawal organization profile or check the transmission mode selected to upload your direct deposit-withdrawal data to Desjardins headquarters.

History

This page shows the changes that were made to the business profile.

The History section includes activity for the six months following the creation of the business file and the six months prior to the date of the last change to the file.

The following information is provided:

- date and time of the change
- name of the user who made the change
- description of the change

User management

Click the **Business** tab, then **Users** to see the list of employees with access to the application, or grant access rights to the application or some transactions to other employees.

The table includes the following information:

- Name
- User code
- Telephone number
- Mother's maiden name
- User category, which defines the functionalities available to the user
- Status. May be "Active" or "Suspended". Status is suspended when users make three errors when entering their password. The password then has to be reactivated.

Not all users have access to the same functionalities. Access to functions and accounts is determined by the user category and functions defined when the user code was created.

User category

There are three user categories: primary administrator, secondary administrator, employee. When your business is registered for AccèsD Affaires, the caisse provides a user code for the **primary administrator**. The primary administrator is an employee who has access to the entire range of services set up with your caisse. There can be only one primary administrator per company. The primary administrator defines user accounts and the services that are available to each of them, provides assistance to users and is the liaison between the business and the AccèsD Affaires Services Support Group. The primary administrator may create secondary administrators and employee accounts.

The secondary administrator only has access to the services defined by the primary administrator. The secondary administrator provides assistance to other users and creates new user accounts. It is important that your company appoint at least one secondary administrator in anticipation of situations where the primary administrator is unable to assist other users or authorize transactions that require two signatures.

The primary and secondary users may create employee accounts and determine the services that are accessible to them. They may not grant access rights that are broader than their own. Employee users do not necessarily need to be company employees (for example, you may grant access to your accountant).

A primary administrator can only be added by the caisse.
Primary and secondary administrators can add users.
Primary administrators can add secondary administrators or employee users.
Secondary administrators cannot create employee users.
Employee users cannot create other users.

Secondary administrators and employee users can have the same access rights (or less) as the primary administrator, but their access rights can never be broader.

You can never grant access rights that are larger than your own.

Adding a user

1. Select the **Business** tab, then **Users**.
2. Click on the **Add a user** button.
3. Fill out the Add a user page.
4. Click on the **Validate** button. The new user will be on the list.

Modifying user information

1. Select the **Business** tab, then **Users**.
2. Select the user you want to change.
3. Click on the **Change** button. A new page will open.
4. Make the changes you want.
5. Click on the **Validate** button.

Deleting a user

1. Select the **Business** tab, then **Users**.
2. Select the user you want to delete.
3. Click on the **Delete** button. The user file will be deleted and access rights will be removed.

Obtaining more information on a user

1. Select the **Business** tab, then **Users**.
2. Click on the link that corresponds to the user's name.
A new page containing additional information will appear.

Reactivating a user's password

Make sure you identify the user requesting that his/her password be reactivated. The user code, phone number and mother's maiden name (which appear on the **User** page) can be used to confirm the user's identity.

1. Select the **Business** tab, then **Users**.
2. Click on the radio button next to the user's name.
3. Click on the **Reactivate** button. The new password then appears at the top of the page.
4. Send the new password to the user. The user will have to change the password the next time he or she logs on.

User details

User details provide information about you. This information can be changed. The mother's maiden name is used to identify users when they call **1 877 AccèsD A**. User can find out what their access rights are. To change these access rights, users can contact their administrator (or their caisse, if they are the primary administrator).

User Codes

Each user has his own user code and password that is determined by the system when the user account is created. The administrator gives the password to the user. This information should be kept confidential.

Creating or changing your password

When you log on for the first time, you will have to choose a confidential password to replace the temporary one you received.

Users can change their password at any time.

If the user enters the wrong password three times in a row when logging on, it will be deactivated and they will no longer have access to the system. They must then contact the administrator who is authorized to reactivate the password. Primary administrators who forget their own passwords must contact the E-commerce Services Support Group to reactivate it.

Changing your password

1. Select the **Personalize** tab, then **Change password**.
2. Enter your password in the appropriate field.
3. Enter your password again and click on the **Validate** button.

Reactivating a password

1. Select the **Business** tab, then **Users**.
2. Select the radio button next to the appropriate user.
3. Click on the **Reactivate** button.

Only the caisse or AccèsD Affaires services can reactivate a password for a primary administrator.

The primary administrator can reactivate a password for all users.

The secondary administrator can reactivate a password only for an employee account.

A user cannot reactivate his own password and must ask someone with the appropriate access rights to do so.

Information about your session

When you click **Quit**, you will see a list of all the monetary transactions that were made during your session, as well as a confirmation number for each one. Keep these numbers – they can help you trace your transactions in the future.

Sign transactions

If your firm requires two signatures for transactions greater than a set amount, and you make a transaction for an amount exceeding that limit, the transaction will be placed on hold, pending a signature; AccèsD Affaires will inform you of this. Please ensure that transactions awaiting signatures are approved, or they will not be carried out.

Several companies require two signatures to authorize a transaction. AccèsD Affaires offers this option. If this is not one of your options but you would like to have it, contact your caisse.

If you chose the **One signature** option, all transactions in all the folios in AccèsD Affaires will be carried out with a single signature, even though these folios require two signatures for transactions made at the caisse.

If you chose the **Two signatures** option, transactions made in folios requiring just one signature will still only require one signature. All transfers from folios requiring two signatures will require two signatures. When selecting the **Two signatures** option, you determined a monetary limit, above which a second signature would be required. Transactions for an amount lower than the minimum will not require a second signature.

When users register a transaction (online or in deferred mode), they enter the first signature. The second signature can be provided only by another user with the “**Two signatures**” option.

Note: A user who is not authorized to sign a transaction can still save a transaction, which will require two authorized signatures to be completed.

Unauthorized transactions will not be completed. It would be prudent to allow more than one user to authorize transactions in anticipation of situations where the authorized user is unable or unavailable to authorize a transaction.

Signing a transaction

1. Select the radio button corresponding to the appropriate transaction.
2. Click on the Sign button. If the transaction was set up to take place immediately, it will be carried out at this time. If the transaction was set up to take place at a later date, it will be added to the list of pending transactions until the scheduled processing time

Deleting a transaction to be signed

1. Click the radio button corresponding to the transaction to delete.
2. Click on the **Refuse** button. The transaction will not be carried out.