**businessONLINE**

الإمارات الإسلامي
EMIRATES ISLAMIC

# businessONLINE Maintenance Guide

### What is this service?

The businessONLINE Maintenance service request allows you, as an Authorised user / Administrator, to manage all your services, enable or disable products, modify charging account(s), update the company profile, modify administrator setups, and the access to businessONLINE. Also, raise multiple requests at once. Basically, maintaining, managing, and controlling all key features.

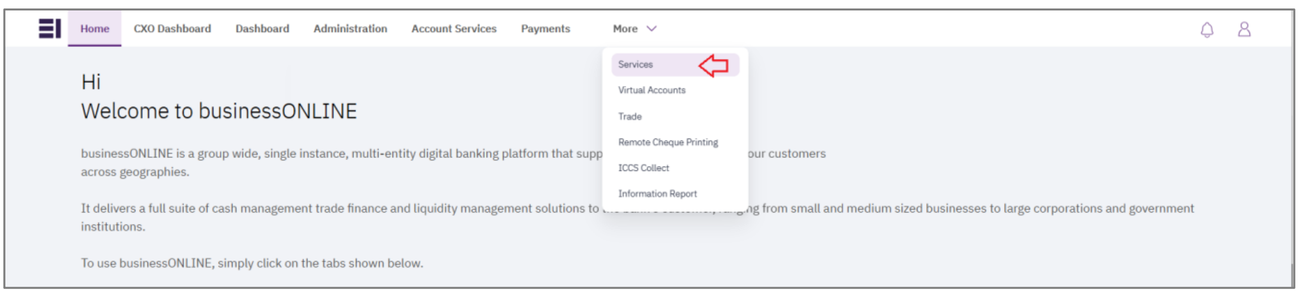
### How to access it?

After you log in to businessONLINE – Services, you can access this service on the “View all services” page found on the top of your dashboard page. View the service from the left-side categorising buttons and / or use the filtering tabs. Alternatively, you can find this service by typing its name / title in the search bar or using related keywords.

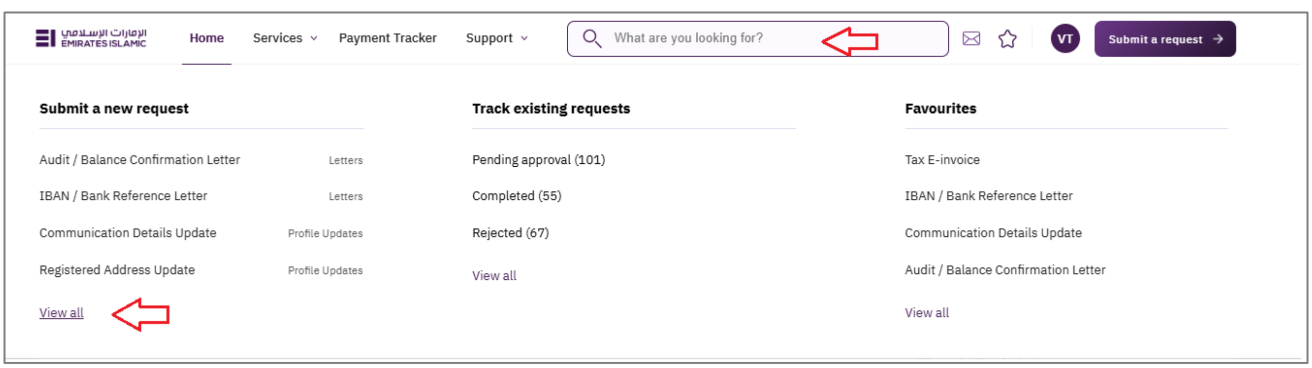
**NOTE**: If you cannot find this service, your Administrator might have not added it to the list of available services for your organisation. Therefore, you will have to request it to be added by your Administrator to view and use it.

### Here are the steps:

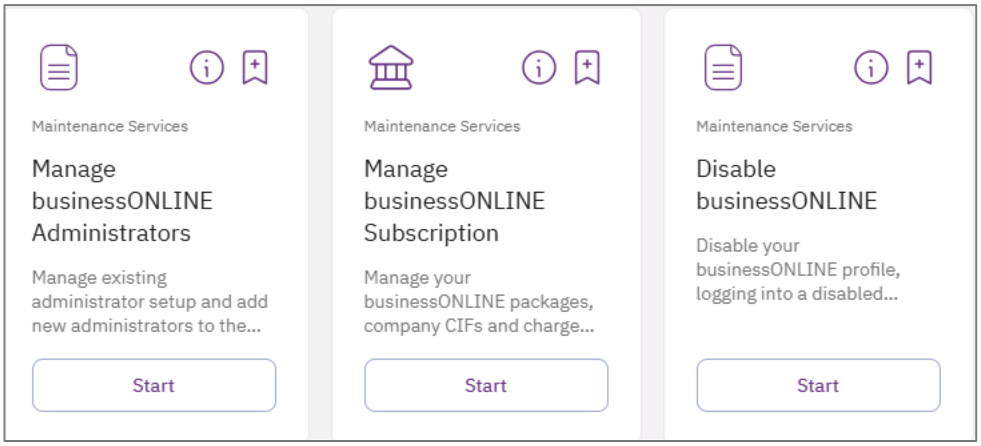
1. Log in to businessONLINE.
2. Click ‘Services’ tab.




3. On dashboard page, under the “Services” section – select “View all”.



4. On the service card, select the "Start" button to use this service or the "Learn more" button for further details.



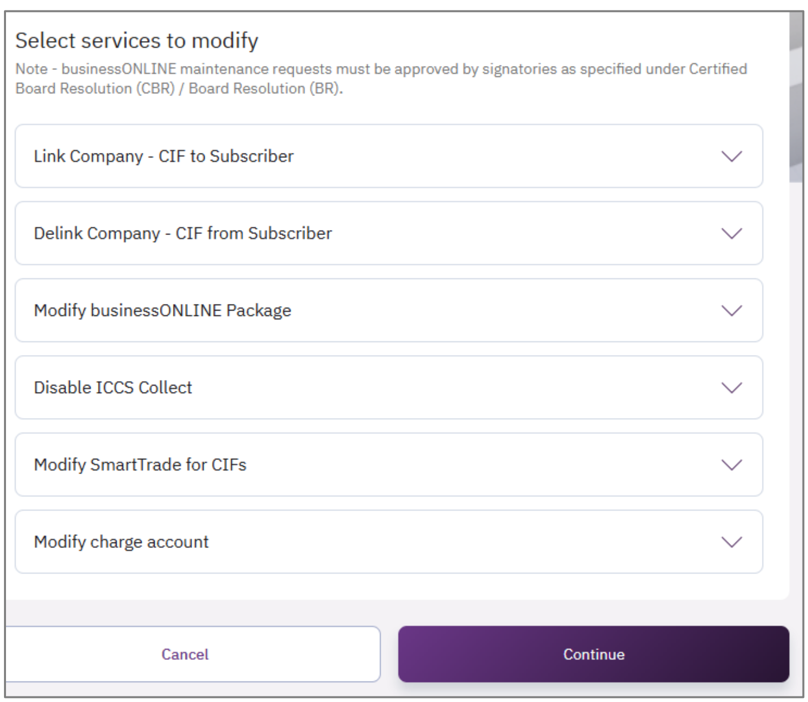

**How to submit a service request form?**

To submit any service request through businessONLINE Maintenance, click on the "Start" button on the service card titled "businessONLINE Maintenance". Once clicked, you will access a simple form and do **6 steps**:

1) Select a category to maintain and to view all its related sub-services.
2) Select a sub-service dropdown arrow to maintain.
3) Do your changes as per selection.
4) Click either "Save" or "Reset" your changes.
5) Review the summary of your changes ,edit or delete any before submitting.
6) Click "Submit" to send it for approval to be then processed by the bank.

**What are these sub-services?**

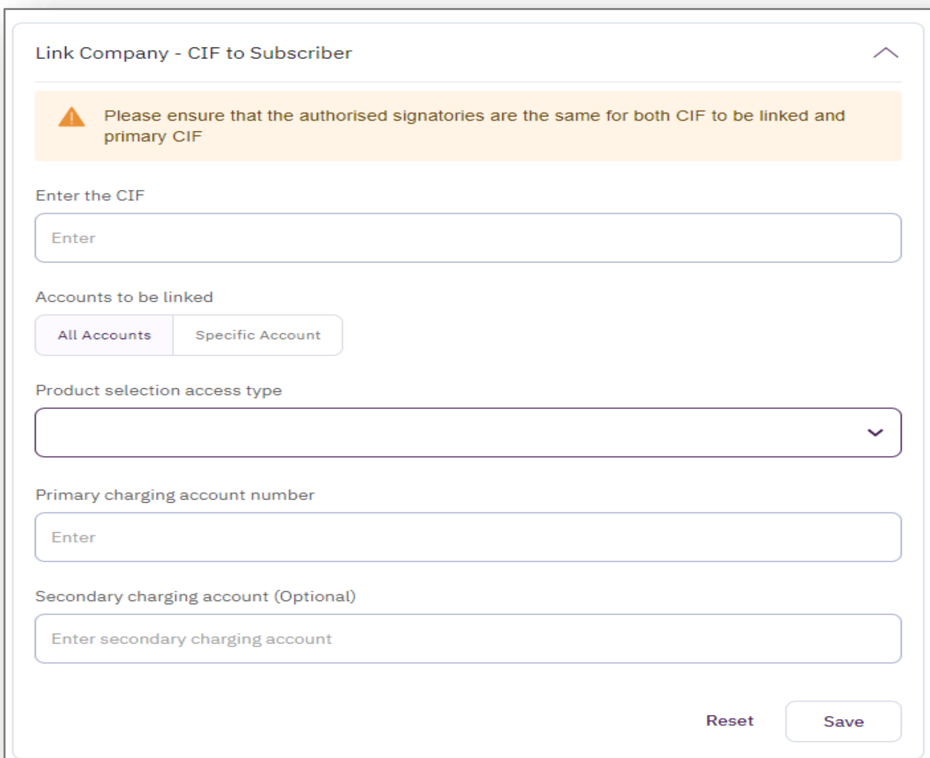
In Manage businessONLINE Subscription, you will have six categories to select from: **Products** and **Charges.**



Upon selecting a category to maintain, you will unlock all available related sub-services to choose, view, update, and save for submission when all is done.

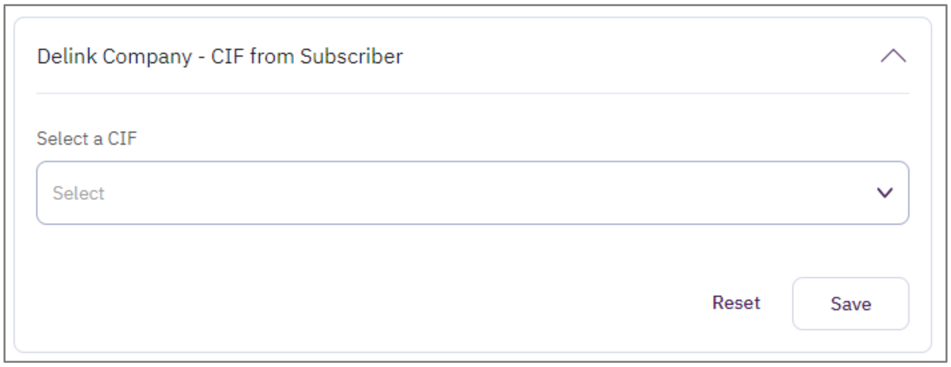
**For the "Products" category, these are the sub-services:**

1. Link company - CIF to subscriber
    - Link accounts as well and set the charging debit accounts.
    - Start by entering the CIF you want to link to the subscriber. Then, choose which accounts to link, as well. You can choose "all accounts" or a "specific acount". After that, decide the products access type selection from a dropdown list. Finish up by selecting your primary and secondary (optional) charging accounts.
    - Once done with your changes, click "Save" to this sub-service, or "Reset" if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.



2. Delink company CIF from Subscriber

   - View all linked CIFs and choose which to unlink for a subscriber.
   - This is a simple, one-field service. All you need to do is to select the CIF that you want to delink from a given dropdown list, and “Save”.
   - Once done with your changes, click “Save” to this sub-service, or “Reset” if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.

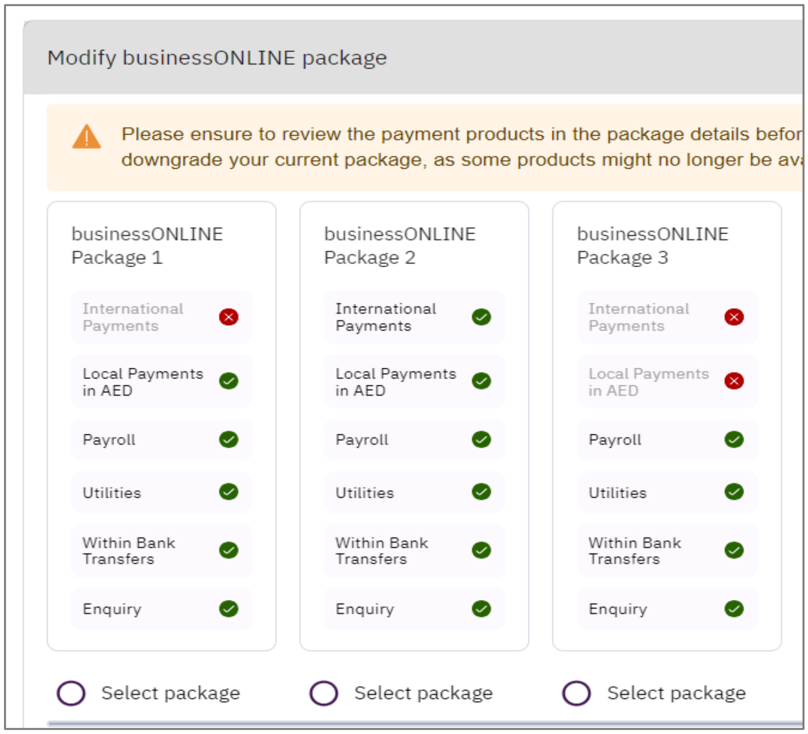



3. Modify SmartTrade for CIFs

   - Enable or disable this feature for selected CIFs.
   - Start by selecting the CIFs you want to modify their SmartTrade feature, all at once. Then, a display of the CIFs’ names will be listed below, with a toggle button next to each of the CIFs you selected above. To modify the SmartTrade feature for each CIF one-by-one, meaning to enable or disable it for them, switch their toggle button between on and off.
   - Once done with your changes, click “Save” to this sub-service, or “Reset” if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.

4. Modify businessONLINE Package

- Upgrade or downgrade packages and products.
- Start by viewing the different package options which come with different products:
    - businessONLINE Package 1, businessONLINE Package 2 and businessONLINE Package 3.
- To get the maximum of what businessONLINE can offer you, choose "businessONLINE Package 2" for business banking . For a package option that can help with your payrolls, utilities, transfers within your bank, and other enquiries, choose "businessONLINE Package 3"( Business banking) . For basic enquiries package only, with no payrolls or transactions option, you can choose "businessONLINE Enquiry Package", which is also the first and default package if no other packages has been selected.
- There are no restrictions on how much you can change your businessONLINE package. However; it takes 24 hours for your new package to reflect and get updated on the portal, once the request has been completed.
- Make your package decision by clicking on "Select package" and then "Save", unless you want to discard your choice, you can select "Reset".
- Note that your already active products might be cancelled or no longer accessible to your account if you downgrade or select a package that don't include your previous active products. You will not be able to keep your current products, unless your new package support them, too.
- Once done with your changes, click "Save" to this sub-service, or "Reset" if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.

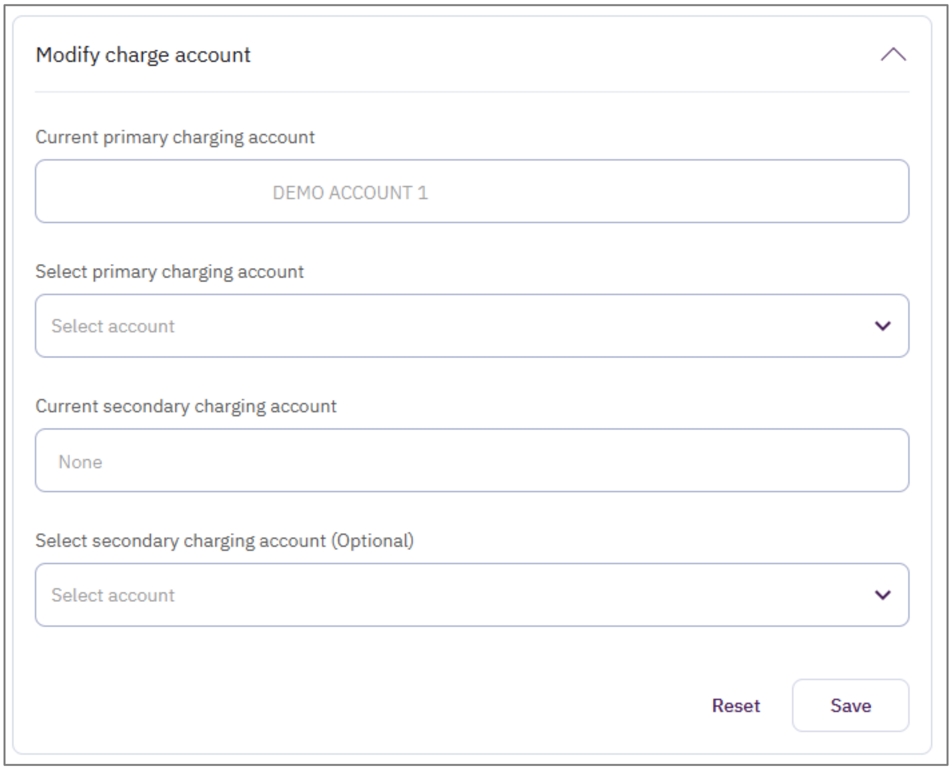



5. Disable ICCS Collect
    - Choose to disable the ICCS collect and its access.
    - Start by selecting a CIF from the dropdown list, then specify your reason to disable the ICCS collect. Select a reason from the given options on the dropdown list or explain your own reason by selecting “Others”.
    - Once done with your changes, click “Save” to this sub-service, or “Reset” if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.

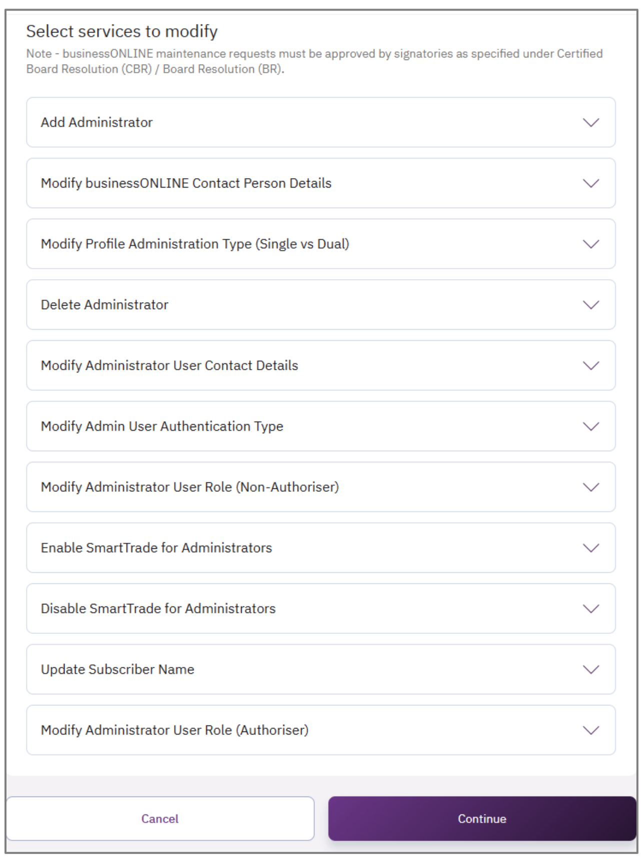

**For the "Charges" category, below are the sub-services:**

1. Modify Charge Account – Charges

   - Setup all primary and secondary charging debit accounts.
   - View your current primary charging debit account in the first text field displayed by default, then select a new primary charging debit account instead of it by selecting a different one from the dropdown list below this field. Do the same to select a new secondary charging debit account. If you already have one, it will be displayed by default in the below field, otherwise this field will say "none". If you wish to add one or change the current one you have, then select a different debit account from the dropdown list. Bear in mind that having a secondary charging account is an option, and not a requirement to proceed.
   - Once done with your changes, click "Save" to this sub-service, or "Reset" if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.

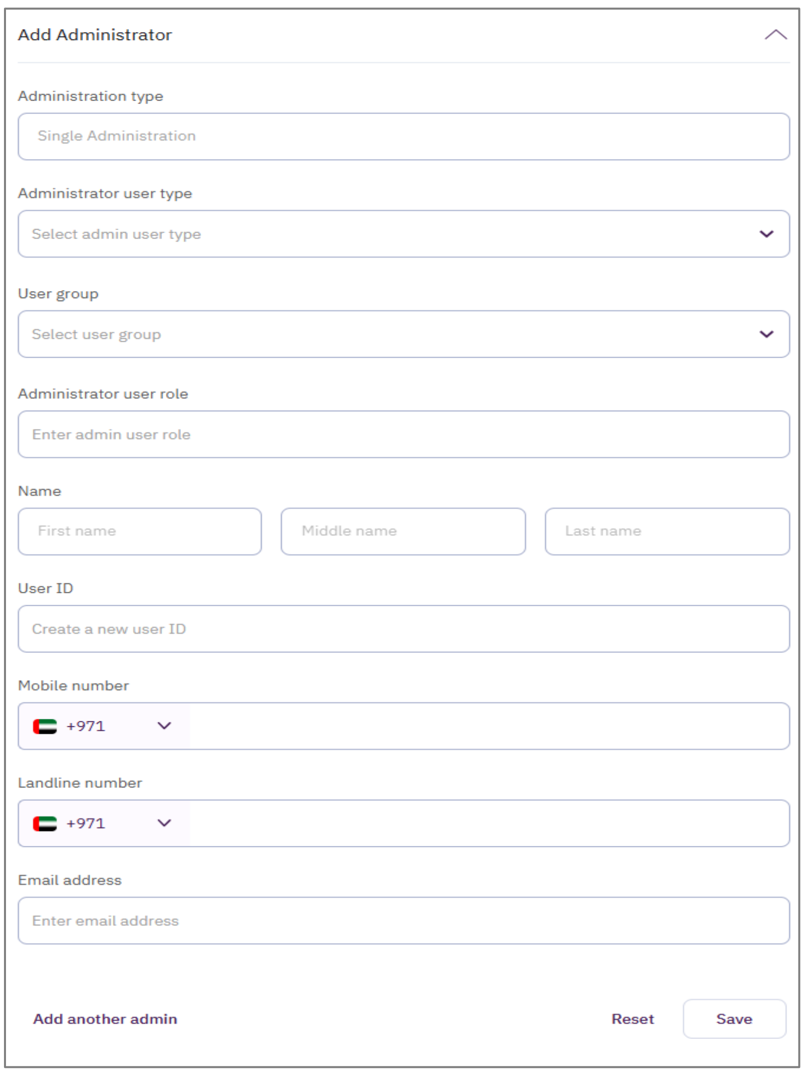



**Below are the sub-services under Manage businessONLINE Administrators.**



1. Add a New Administrator

- Set their details, administration type, user group, and role.
- Start by giving your new Administrator's first, middle, and last name. Make sure their new full name is as per their ID card. Next, create a unique login ID for your new Administrator. This login ID is this user's login ID. It must contain at least 3 characters, but not more than 32. It also must consist of alphanumeric characters only (i.e. English letters and numbers), and without any special characters or spaces in between. Proceed by giving their mobile and/or landline numbers with the correct country codes, valid email address, and finally their Administration type – Single or Dual.
- Once done with your changes, click "Save" to this sub-service, or "Reset" if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.


Add Administrator

Administration type
Single Administration

Administrator user type
Select admin user type

User group
Select user group

Administrator user role
Enter admin user role

Name
First name | Middle name | Last name

User ID
Create a new user ID

Mobile number
+971

Landline number
+971

Email address
Enter email address

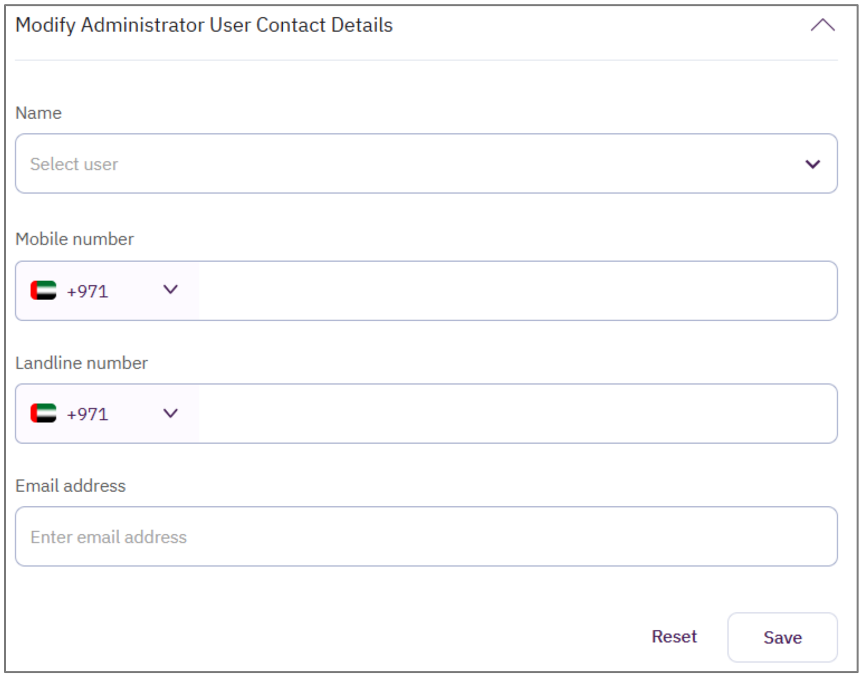
Add another admin | Reset | Save

2. Delete an Administrator

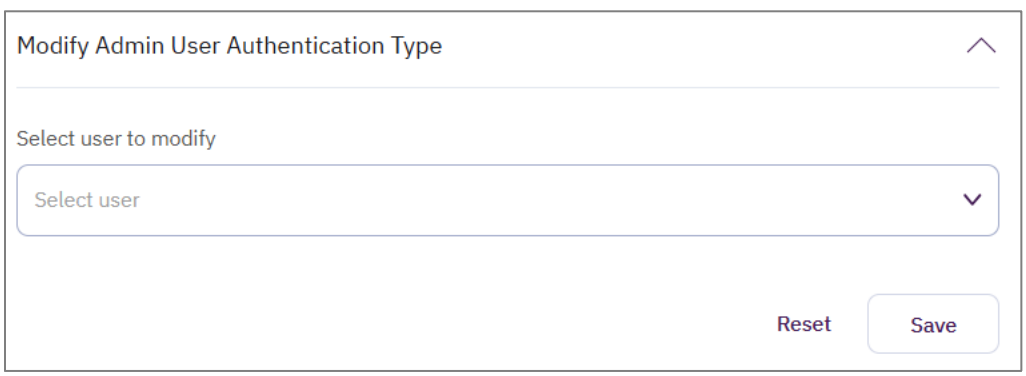
- Remove any user from being an Administrator.
- This is a simple, one-field service. All you need to do is to select the Administrator's name that you want to delete from a given dropdown list, and "Save".
- This service request deletes the actual user and their access, meaning that a user and their record will no longer exist on your account and their login credentials will be inactive upon the request completion. It takes 24 hours for the deletion to reflect on the portal.
- Once done with your changes, click "Save" to this sub-service, or "Reset" if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.


3. Modify Administrator User Contact Details

- Mobile number, landline number, and email address can be edited with this service.
- Start by updating full name, then mobile and/or landline numbers, along with the correct country code, then email address – make sure it's a valid one.
- Once done with your changes, click "Save" to this sub-service, or "Reset" if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.



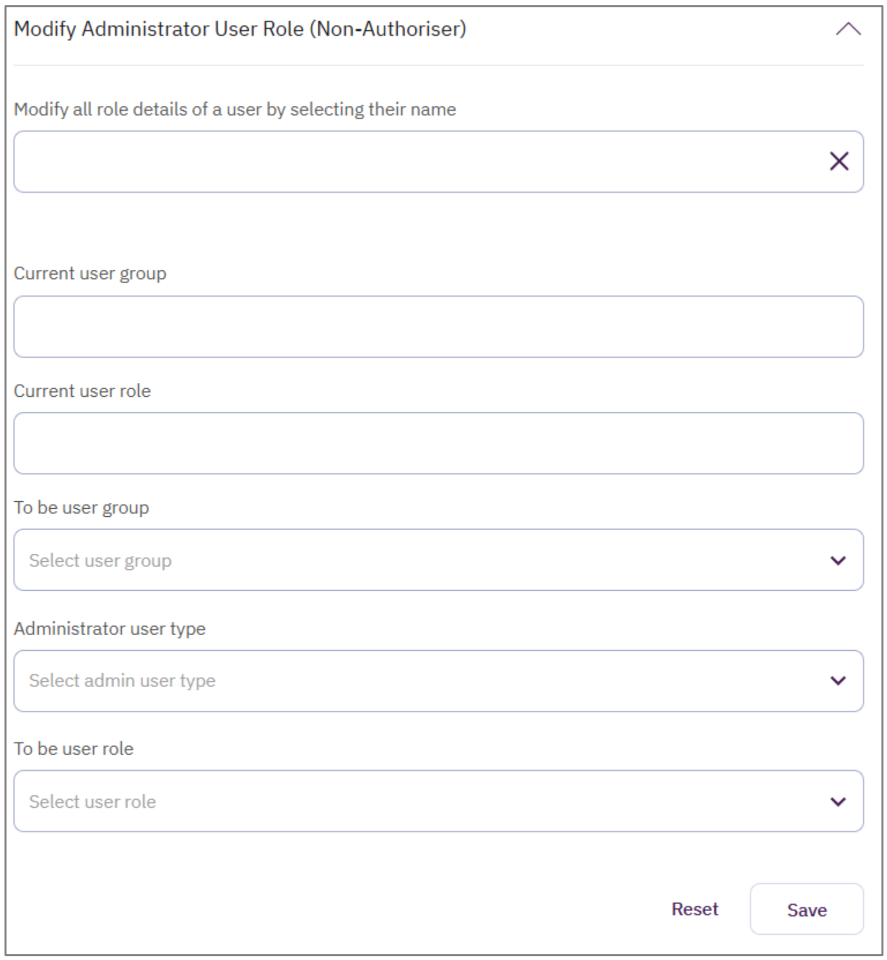

4. Modify Administrator User Authentication Type
    - Change the authentication type for an Administrator.
    - View your Administrator full name below, then proceed to modify their authentication type: OTP + Token, OTP, or Token only authentication.
    - Once done with your changes, click "Save" to this sub-service, or "Reset" if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.




5. Modify Administrator User Role (Non-Authoriser)
    - Change the user role for a non-Authoriser Administrator.
    - Start by selecting the Administrator's name to modify all their role-related details. After selecting the name, you will be able to modify the Administrator's current user group to the new group, their current user role to the new role, and their Administrator user type. Finally. You have to upload a

copy of their valid identification documents. These are mandatory attachments of their government-issued ID; for expats/residence, upload their passport, and for the UAE nationals/citizens, upload both their passport and their Emirates ID (front & back sides).

- Note that this service is for the Non-Authoriser Administrators only, there is a different service for the Authoriser Administrators under the same category.
- Once done with your changes, click "Save" to this sub-service, or "Reset" if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.

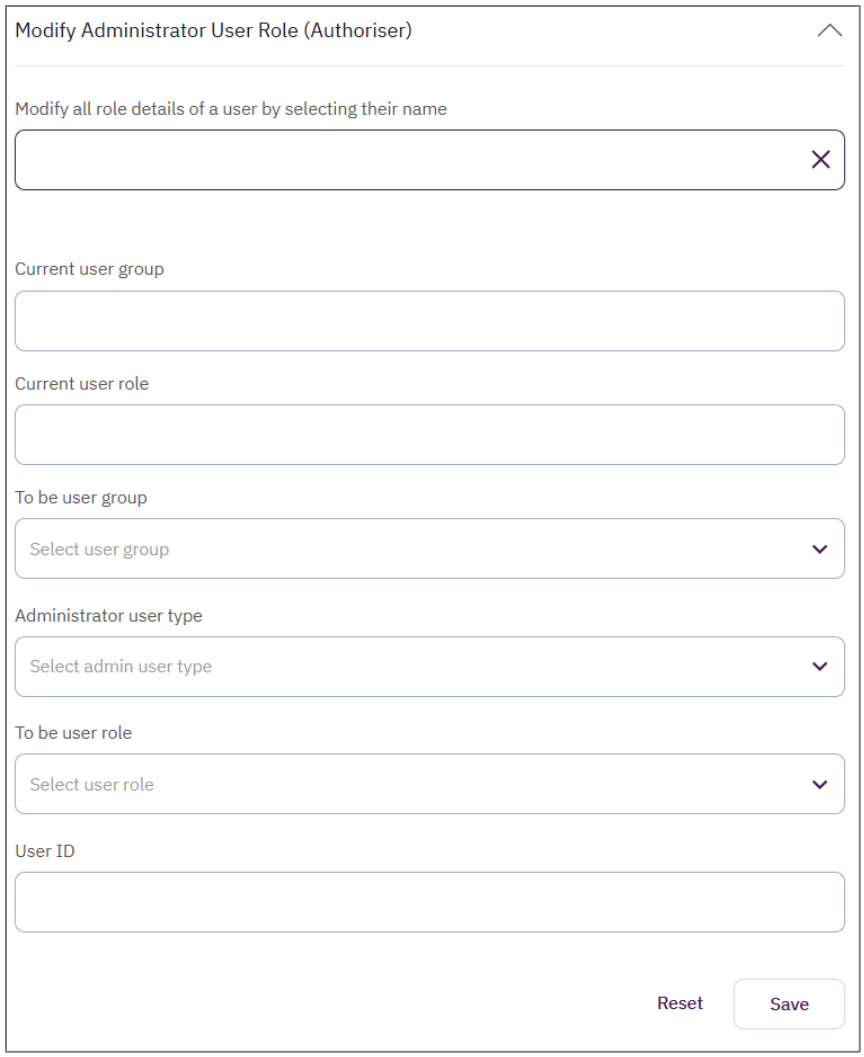



6. Modify Administrator User Role (Authoriser)

- Change the user role for an Authoriser Administrator.
- Start by selecting the Administrator's name to modify all their role-related details. After selecting the name, you will be able to modify the Administrator's current user group to the new group, their current user role to the new role, and their Administrator user type. Finally. You have to upload a copy of their valid identification documents. These are mandatory attachments of their

government-issued ID; for expats/residence, upload their passport, and for the UAE nationals/citizens, upload both their passport and their Emirates ID (front & back sides).

- Note that this service is for the Authoriser Administrators only, there is a different service for the Non-Authoriser Administrators under the same category.
- Once done with your changes, click “Save” to this sub-service, or “Reset” if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.

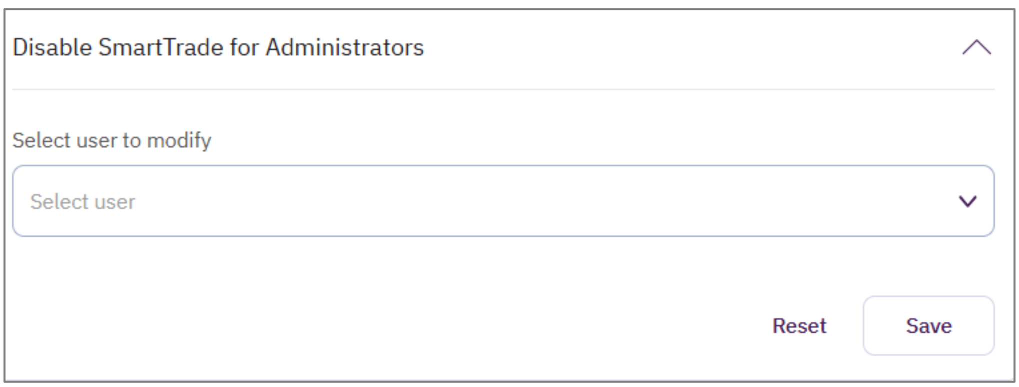



7. Enable SmartTrade for Administrators

- For Administrators, enable their SmartTrade.
- This is a simple, one-field service. All you need to do is to select the Administrator’s name that you want to enable their SmartTrade from a given dropdown list, and “Save”.

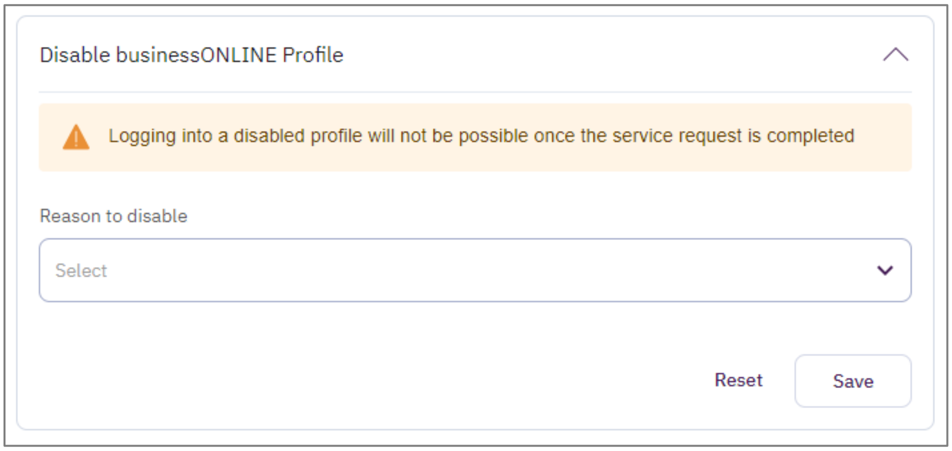
- Once done with your changes, click “Save” to this sub-service, or “Reset” if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.


8. Disable SmartTrade for Administrators
   - For Administrators, disable their SmartTrade.
   - This is a simple, one-field service. All you need to do is to select the Administrator’s name that you want to disable their SmartTrade from a given dropdown list, and “Save”.
   - Once done with your changes, click “Save” to this sub-service, or “Reset” if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.

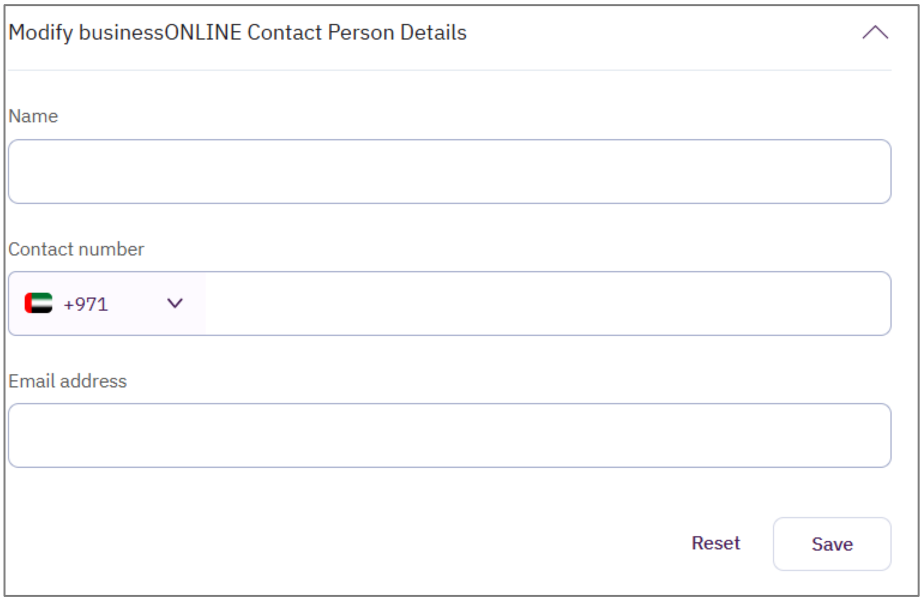



9. Disable businessONLINE Profile
   - Disable this profile with all related activities, including login.
   - Start by confirming the disable of the profile. Note that this action will also disable user’s login to the profile, all related activities and future shceduled activities, and any related notifications will be frozen.

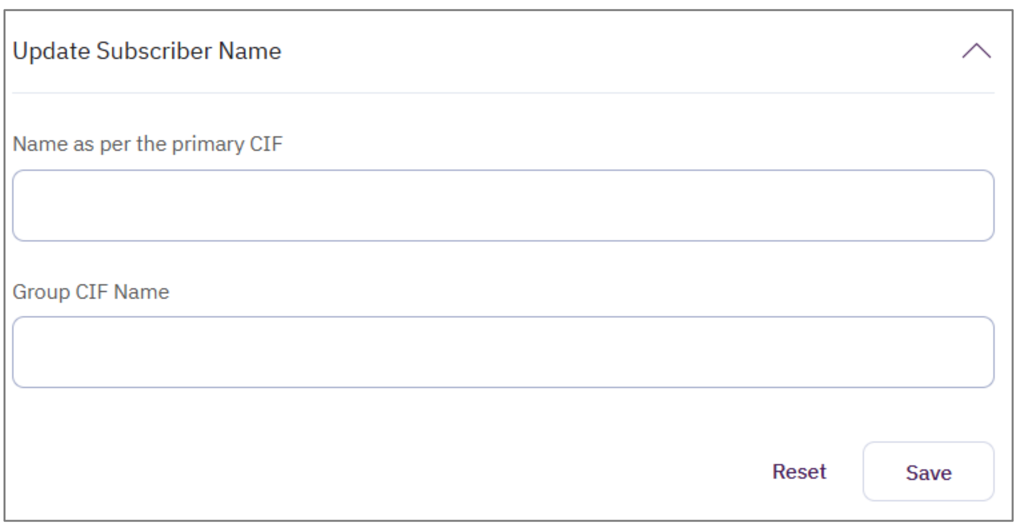
- You can activate again a disabled profile and retrieved in future, but such activation cannot be done through the servicing portal, instead contact our customer care for support. This is not an action to permenantely delete a profile, but only to disable it.
- A notifying email will be sent to all other related users to inform them of the profile being disabled, specifying the disabler user name for record.
- Once done with your changes, click “Save” to this sub-service, or “Reset” if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.




10. Modify businessONLINE Contact Person details
    - Manage and update the account contact person details.
    - Start by updating their full name, then their contact phone number with the correct country code, then their email address, lastly.
    - Once done with your changes, click “Save” to this sub-service, or “Reset” if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.

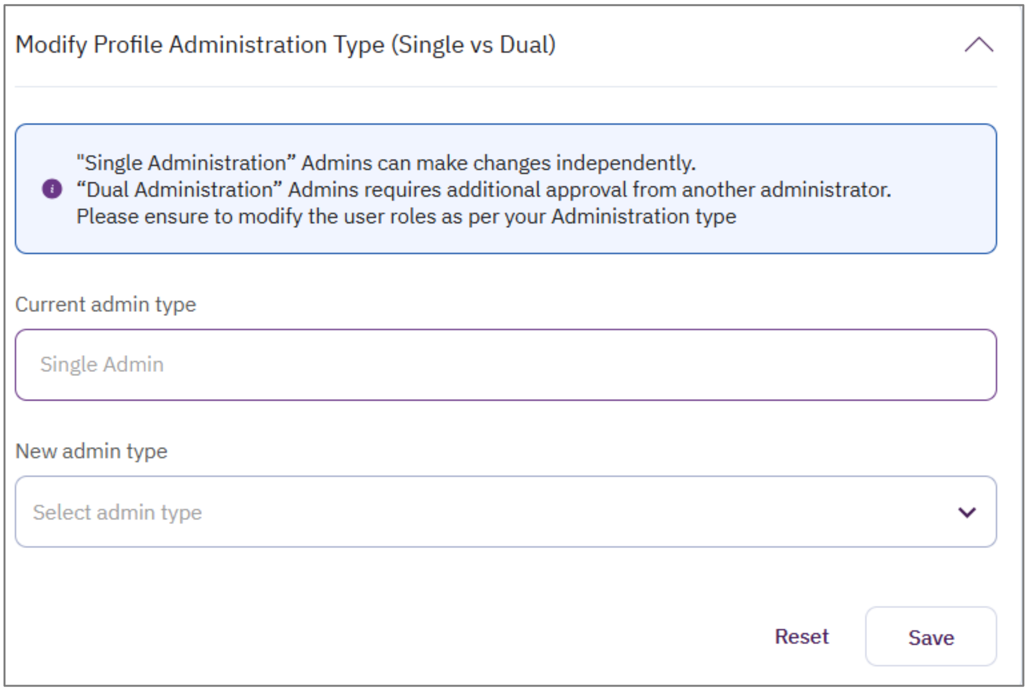



11. Update Subscriber Name
    - Edit or change the current name of a subscriber.
    - View the subsctiber's name as per the primary CIF, then update the group CIF name, accordingly. Allow 24 hours duration for the new names to reflect upon request complition.
    - Once done with your changes, click "Save" to this sub-service, or "Reset" if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.

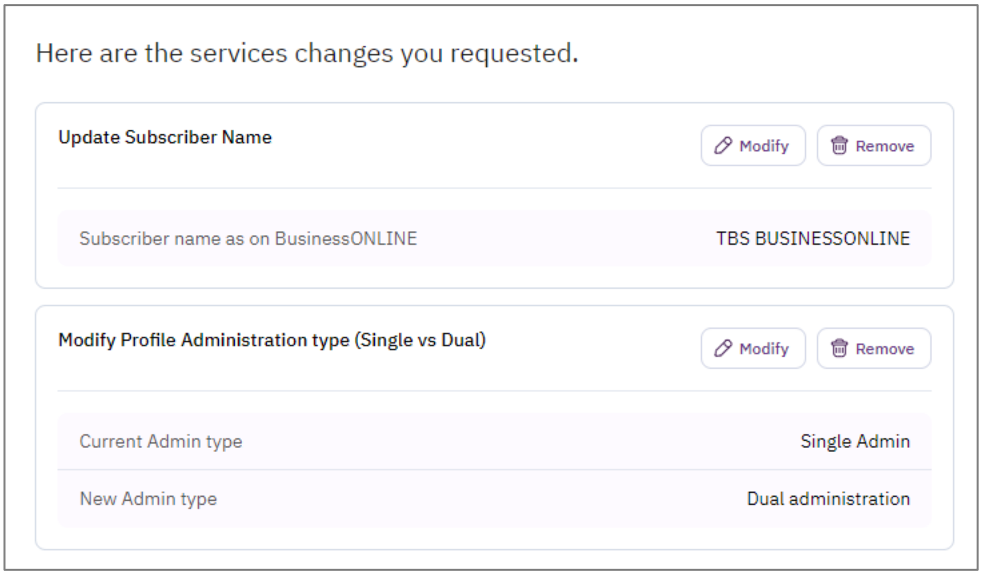



12. Modify Profile Administration type (Single vs Dual)
    - Shift the profile administration type between single and dual.
    - View the current Administration type for your Administrator, it will be either "Single" or "Dual". Then, on the next field, select your new Administration type.

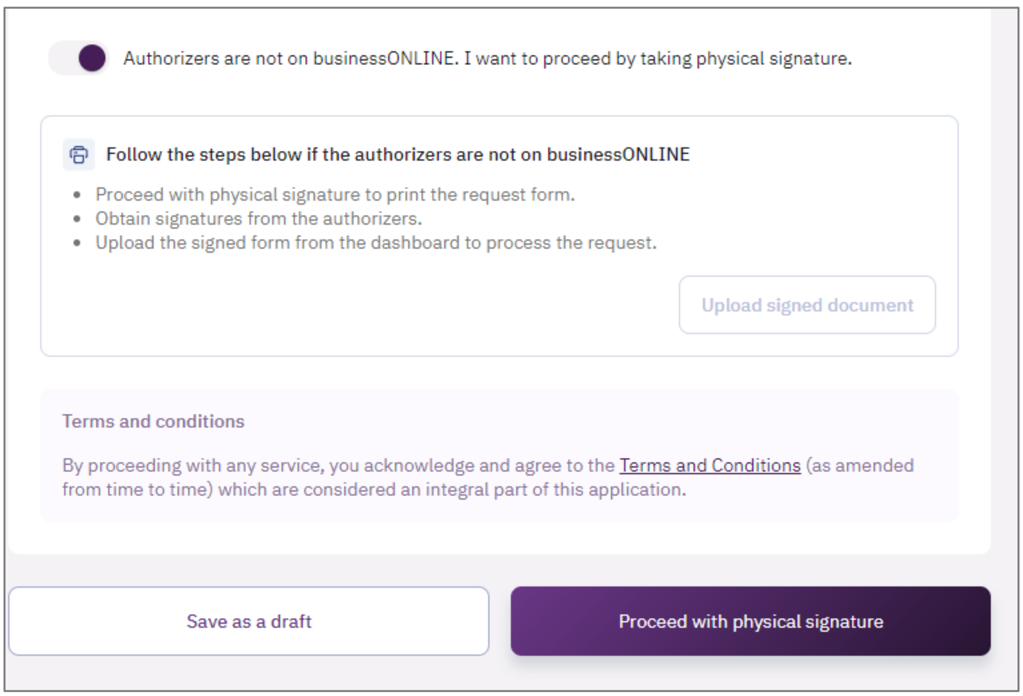
- Once done with your changes, click "Save" to this sub-service, or "Reset" if you want to cancel the latest changes you have done or start over with the default settings. Only saved changes will be submitted through this form, otherwise they will be discarded from the service request.
- "Single Administration" means that any new settings or changes made to existing settings can be performed by any Administrator independently.
- "Dual Administration" means that any new settings or changes made to existing settings can be performed by any Administrator, but it requires an approval from another Administrator.
- Make sure your modification is aligned with the existing user roles as per the Administrator type.



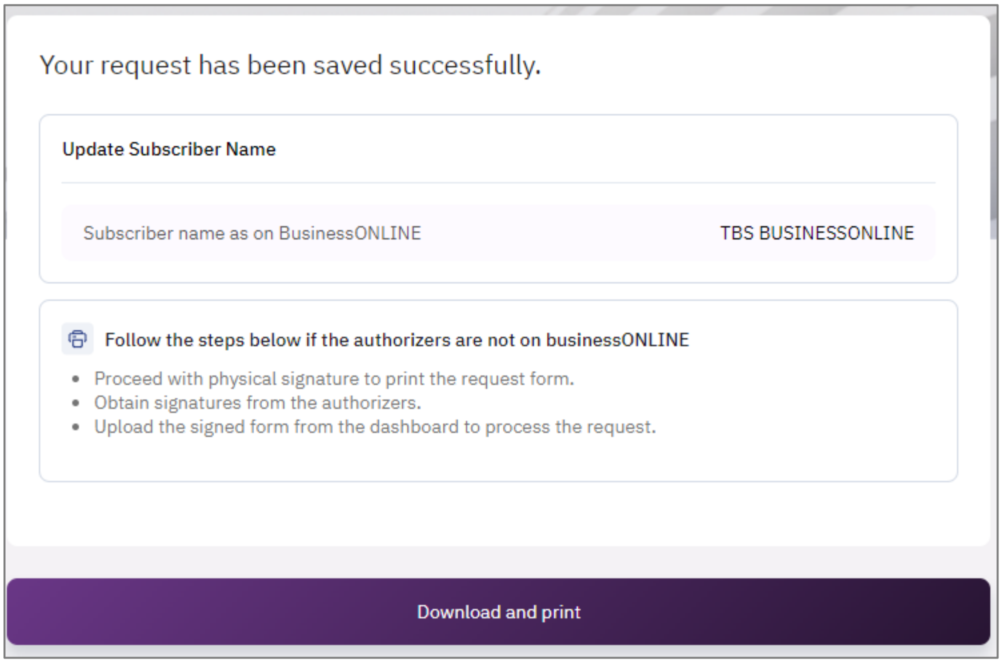

**Note**: Upon submission, a summary review screen of all done changes will be presented for the user to quickly review each change, edit any needed details, or delete/discard any specific sections. The purpose of this summary screen is to give you a chance to double-check if all done updates are accurate.
You can discard or edit any specific section of your request without the rest. However; if you chose to discard all made changes in this summary screen, then there is no further requests to submit (you have to make at least one change to submit this request).



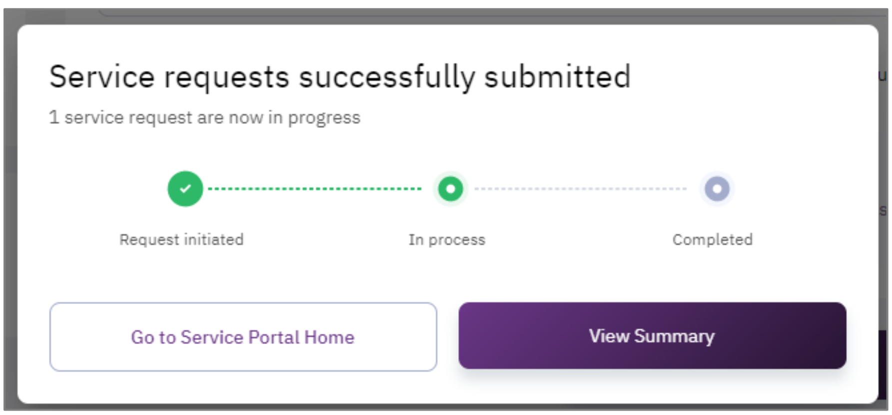

On the same summary page, you can choose to proceed using a physical signature if the authorisers do not have a businessONLINE User ID. Do so by following the steps explained:



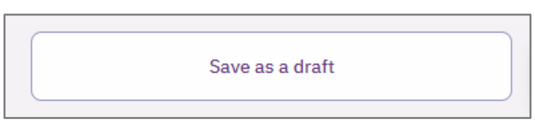

You can then save, download, and print the request.

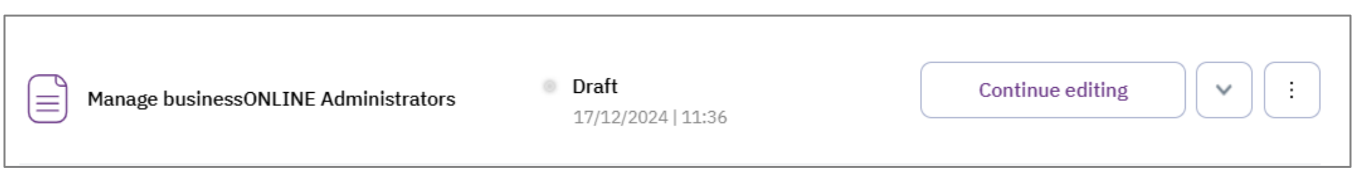



If all is good, go ahead and submit. A pop-up window will show upon successful submission with the the G0 back to service portal and view summary button.

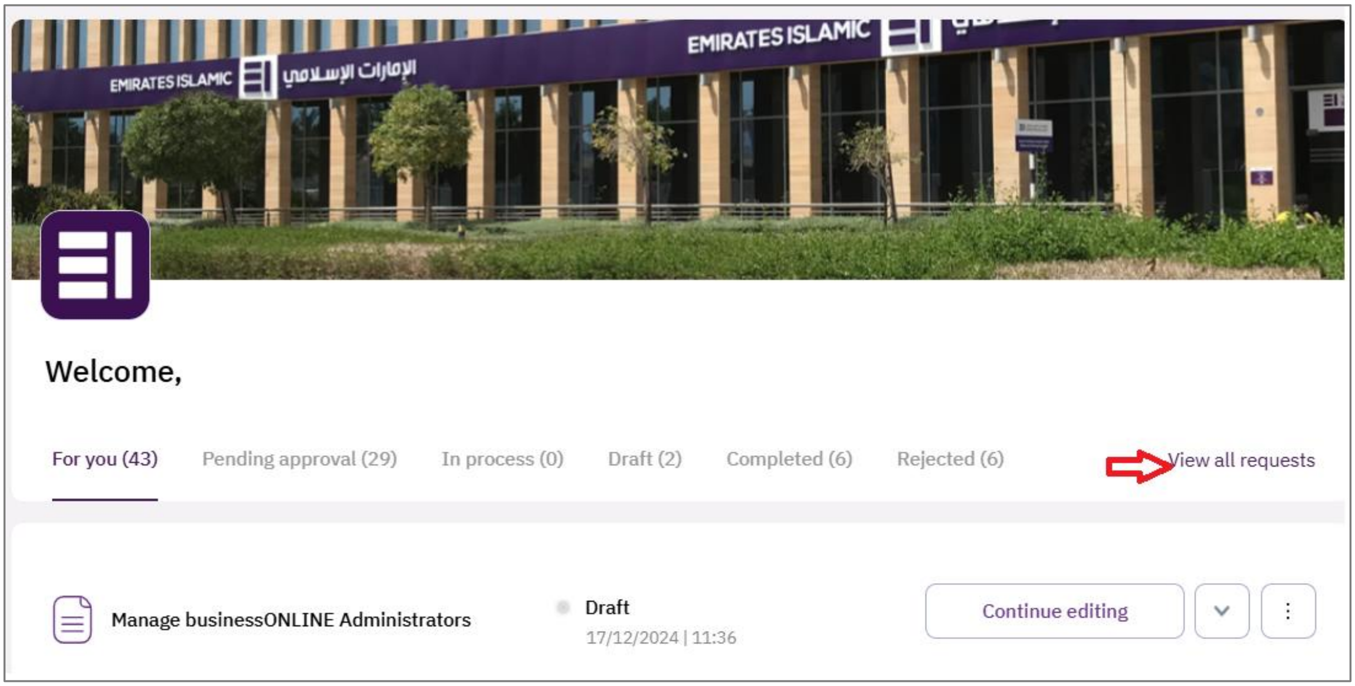



**Note:** We realise this is a lengthy service request; just remember you can always save it as a draft and continue editing it later at your convenience. Click on the "Save as draft" button found at the end of your service request form and access this saved draft from your dashboard whenever you need.

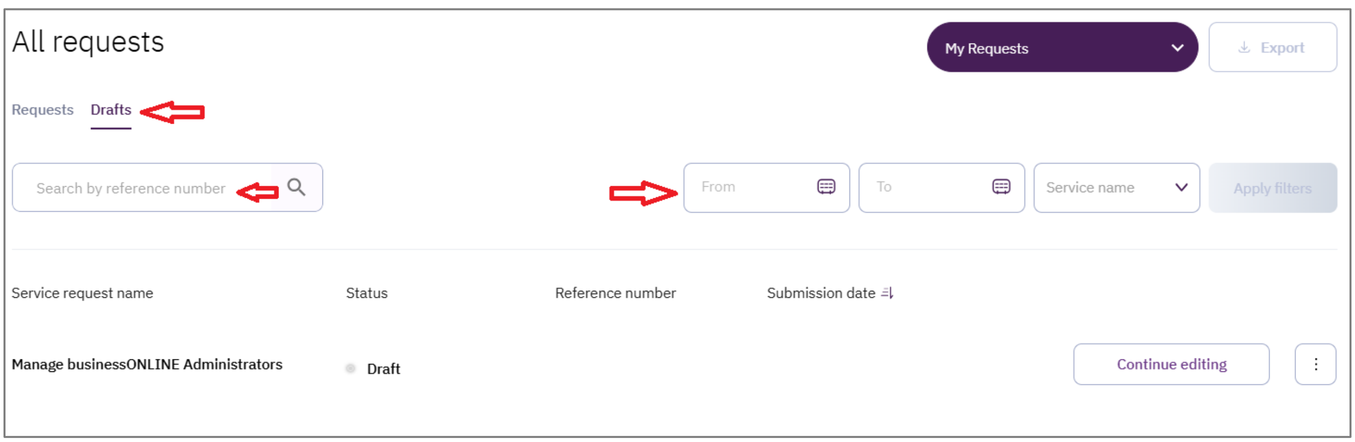


Don't worry about losing any related details, you can still access the details of your submitted service request and track its status by viewing its updated progress steps on the "View all requests" page, anytime you need.




Shift between "Requests" and "Drafts", then filter your search further using the available filter buttons, or simply target a specific request by searching its reference number.




**How to approve / Reject a submitted service request?**

To approve or reject an already submitted service request - in case the submitter has a Maker ID only, your assigned Authoriser has to login into their account, find the submitted service request (accessible on their dashboard), and click on "Approve" or "Reject" after reading the details of the request found under the "Pending approval" tab or the "For you" tab.

**Here are the steps:**

1. Log in to the Authoriser profile on businessONLINE, then click “Services”.
2. Click the “For you” tab found on the dashboard.
3. Select the service request, and click “Approve” / “Reject” next to it.


**How to know if the service request got processed by the bank?**

Once your bank finishes processing the service request, the status of that service request will get updated as “completed” if the request has been procesed successfully, or updated as “failed” if the request has failed to process, along with a summary note of the reason.