Updating User Names and Email Addresses to Prepare for Migration

Soon, your company will migrate to City National Business Suite or Business Essentials from the current platforms (Treasury Net/Business Online). This will also allow you to enjoy convenient single sign-on (SSO) access for accessing your company's Business Suite or Business Essentials platform along with E-Deposit, Business Bill Pay and many other services.

Before migration, you need to ensure that your **Treasury Net or Business Online email address and user first and last name are identical to your E-Deposit information**.

In order to ensure the user email addresses and user first/last names are identical, the instructions below provide the means to confirm and edit your information in:
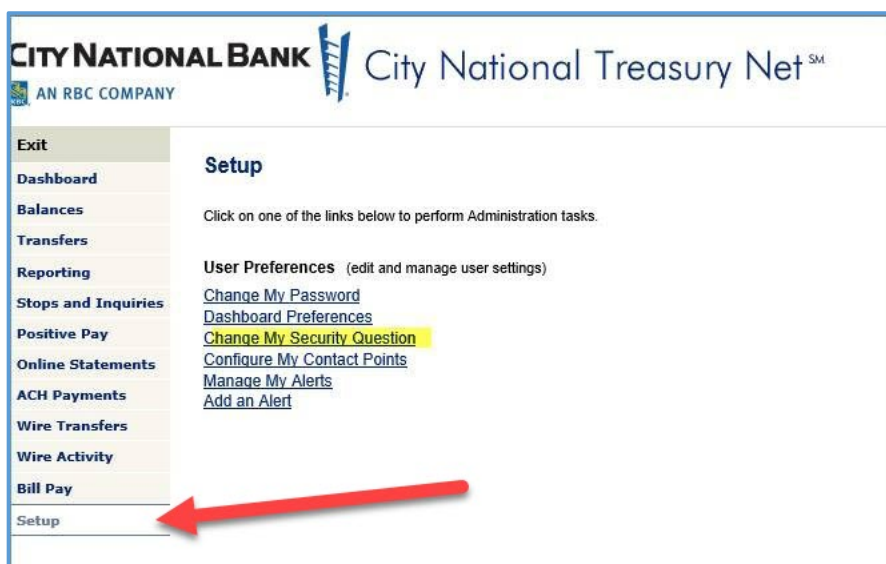
- Treasury Net (email address; change by user only)
  (User's first/last name; change by user with Administrative rights to edit self or others)
- Business Online (email address; change by user only)
  (User's first/last name; change by user with Administrative rights to edit self or others)
- E-Deposit (name or email address; change by System Administrator only)

Treasury Net Email Review and Update

Your Treasury Net email address is found in your Change My Security Question setting.

NOTE: Only the individual user can change this setting, not System Administrators.

1. Click **Setup** at the bottom of the left hand menu.
2. When the Setup screen appears, click Change My Security Question.

3. Type your new primary email address and click **Save My Security Question**.

If necessary, re-enter the Primary Email Address in the field provided, then click **Save My Security Question**.

Business Online Email Review and Update

Business Online allows users to edit their email address, if needed, to match the information in their E-Deposit setup.

1. After logging in, click the **Administration** link on the left menu.

2. Click **Change My Security Question**.
3. Make the edit to your email address as shown above for above for Treasury Net.

Treasury Net – Name Change Process for System Administrators

To change a user's first or last name to match their E-Deposit name, System Administrators can edit the information on Treasury Net or Business Online as shown below.

Treasury Net Name Changes

1. Click on Setup, then Manage Users.

2. Enter User ID and click on Search User(s).

3. Click on User Name to display the maintenance page.

4. Change the user's first or last name and click **Save Basic Info.**

A confirmation message will display as shown below.

NOTE: A second Administrator will need to approve the change if your company has Dual Approval of Customer Users and Roles (set at the company level for all users). This applies to both Business Online and Treasury Net.

Business Online – Name Change (user must have Manage Users entitlement)

1. Click on Administration, then Manage Users.

2. Click on User Name from User list.

3. Enter the new name and then click Save Basic Info.

A confirmation message of the successful change will be displayed as shown below.

Changing E-Deposit User Information

As noted above, both Treasury Net/Business Online and E-Deposit must have matching user email and first/last name information before the migration. As an alternative to changing Treasury Net or Business Online email addresses, your System Administrator for E-Deposit may change the name and/or email address on your E-Deposit profile as follows.

1. Click the Administration tab to bring up the Administration screen.
2. **Search** for a particular user or click **Show All. Click** the paper and pencil icon under **Tasks** next to the User ID column to view the user details.

3. Verify the **first and last names** and **email address** field. If updates are required to match Treasury Net, click **Edit User.** Make required updates, then click **Save.**

4. Repeat these steps for all of your company's users.