Business Hub

Frequently Asked Questions

General Questions

1. **I'm in Online Banking. Why can't I see my Business Hub?**
    a. *Click on Login in the Menu bar. Then click on Business and it will link you to Charter Bank's Business Hub.*
    b. *You must use this separate URL to access Charter Bank's Business Hub.*
        i. *: https://treasury.jackhenry.com/jhasupport*

2. **What browser should I be using?**
    a. *We recommend Internet Explorer or Chrome, but any browser should work.*

3. **On *My Dashboard* under *My Accounts*, I don't see any accounts.**
    a. *Click on Manage Groups then find Group 2. Click Delete Group.*
    b. *Find Group 1 and click Add Accounts. Select All Accounts box and click Add Accounts.*

    Suggestion *– We encourage you to rename Group 1 to what makes sense to you, or to* ***My Accounts****.*

    c. *Click on the pencil (edit) behind Group 1 wording. Type your new Group Name to your chosen name. Click* ***Rename Group****. Click* ***Done****.*

4. **For each of my accounts, can I see more than 10 days in Account Details?**
    a. *Yes. Under* ***My Accounts*** *and each individual account, click* ***Details****, then* ***View Account Transactions****. In the* ***Transaction Dates*** *dropdown, click on your desired range and complete any additional fields to complete your request. The last 10 days is the standard default view.*

5. **I'm not getting my notification or I'm getting too many?**
    a. *You will want to check your notification settings. On the top right-hand corner click the drop down by your username, choose* ***Notification Setup****.*
    b. *Verify your email and/or mobile number*
    c. *Review the notifications. Blue indicates that it is enabled. Gray indicates it is turned off.*
    d. *Once you turn on the notification you would like to receive, check the methods you would like to receive them. You can check more than one delivery method, such as email and text.*
    e. *You will want to ensure to look at all seven areas, just hit the + in front of each product name.*

6. ***Why are some reports blank when I try to run them?***
    a. *Until some history is built in Business Hub, some pre-defined reports may not populate. In these situations, you can go to* ***Accounts > Research Transactions****, then pick the date range for what you'd like to see. You can see up to 18 months of history.*

7. **Do I still need to sign in separately to do the Remote Deposit Capture (RDC)?**
    a. No. You only need one sign-on for both Business Hub and RDC once the single sign-on is enabled. This is enabled at the company level, so all of your employees would need to access Remote Deposit Capture through Business Hub going forward. To enable this feature, please send us a message from within Business Hub by clicking on **Message Center** in the top toolbar and clicking **Compose**.

8. **How do I make a transfer?**
    a. *Go to the **Payments** drop down in the upper right corner menu. Click **Payments> Create Transfer***
        i. *You can do One-to-One Transfers, One-to-Many Transfers and Many-to-One Transfers.*
        ii. *You may also set up a **Recurring Transfer** by clicking the dropdown box by Frequency.*
        iii. *Once fields are completed, click **Add Another Transfer** or **Review>Confirm**.*

    b. *You can also utilize the **Quick Transfer** widget on your dashboard. Click on "search" to show all accounts you are authorized to view.*
        i. *Within the Quick Transfer widget**, Advanced Transfer Options** allows you to get more detailed options for transferring.*
        ii. *You may create a Template for recurring transfers by going to **Payments>Create Transfer from Template.*** This is useful if you complete a monthly or frequent transfer to multiple accounts.

9. **What are my options to download my transactions?**
    a. *Excel, CSV, PDF, OFX, QBO*

10. **How do I research transactions?**
    a. *Go to the Accounts drop down in the upper right corner menu. Click **Accounts>Research Transactions.** Complete the information on the left side of the screen, then click **Search. >***
    b. *Or within your account groups, Click **Details** Details >**View Account Transactions**. Under **Transaction Dates** select your range. For more details, click **Advanced Transaction Search** on the right side of the window.*

11. **How can I change the name on the account?**
    a. *Go to the Admin drop down in the upper right corner menu. Click on **ADMIN>Account Nicknames.** Click on the edit icon either to the right of each specific account or click **Bulk Edit Nicknames***

12. **What type of loan payments can I make?**
    a. *You can make **Principal + Interest** OR **Principal only.***
    b. *Currently there is not an option for **Interest Only**, but this will be coming soon.*

13. **Can I send/upload documents?**
    a. *Yes. If you would like to send Charter Bank a document through a secure method, go to **Message Center>Compose>Subject** (drop down box)**>Select File** (browse)**>Compose a message>Send.***

14. Can I reset my own password if I forgot it?

- a. *Yes. On the login page, click on **Forgot Password**.*
- b. *If you are locked out, you should contact your business's online banking Administrator and they will be able to reset the password for you.*

15. As the Administrator, I just set up a new user and they are not working?

- a. *You must click **Submit for Enrollment** at the top of the new user screen.* 

16. I am not seeing all the accounts. How can I view them?

- a. *If you are the Administrator for the company, you choose the accounts that others can view. This is done under **Users>Actions>Edit User**.*
- b. *You Administrator chooses the accounts that you can view. If there is an account you need to view, contact your Administrator.*

Dashboard

17. How do I change the look of my dashboard?

- a. *Click on **Configure Dashboard** in the upper right corner of the screen.*
    - i. *You can change the location of each "widget" by clicking, dragging and dropping to where you'd like to see it. You can remove widgets you will not use.*

18. How do I get back to the Dashboard or exit from a certain page?

- a. *You simply click on **Dashboard** in the upper right corner menu.*

Security Tokens

19. What are my options for security tokens?

- a. *You can have either a physical token, a virtual token through a device, or on your PC.*
    - i. *When you first login, the system will prompt you for the token information. Please update this information immediately.*
    - ii. *Do not click on "Remind Me Later". This needs to be done immediately.*
- b. *What if I already have a token?*
    - i. *You will register your token, then you will be required to create a PIN on the registration page.*

20. My Virtual Token is not working. What do I do?

- a. *If you recently got a new cell phone, you will need to download the app again, and re-register your token. If not, please call Charter Bank at 800-471-4510.*

ACH

21. My ACH payment has not gone out. Why?

a. *Check the menu in* ***ACH Activity*** *to determine the status of your batch. Please review* ***Payments Pending Approval*** *and approve any outstanding items.*

22. Can I set an ACH file to automatically be sent?

a. *Yes, go to* ***Payments>Recurring ACH Payments>Create New Payment****. Once details are added, under* ***Frequency****, choose the timing you prefer for the ACH batch to be sent.*

Wires

23. Can I set a wire to be automatically sent?

a. Yes, go to ***Payments>Recurring Wires>Create New Payment****, and under Frequency, choose the timing you prefer for the Wire to be sent.*

24. When I'm entering a new Wire, I need more lines to enter all my information.

a. Go to ***Additional Information*** *and hit the + sign to add more lines. You can add an additional 4 lines, with up to 36 characters per line. See the User Guide for more details.*

25. Can I get notification when a wire is approved or rejected?

a. *Yes! Go to* ***Notification Set-up*** *located in the upper right-hand corner drop down box under your username. Simply enter your email and/or phone number. Then click the boxes of the Notifications you'd like to receive and how you'd like to receive them.*

Positive Pay

26. My Positive Pay file will not load?

a. You will need to choose your format file type the first time you load the file.

eStatements

27. Where do I find my electronic statements?

a. ***Reporting>Electronic Documents>Statements***

b. You must first be enrolled in eStatements. The system will walk you through the enrollment process.