



Employer Profile

Use the green buttons to move through the tutorial.
There is no audio with this tutorial.



NBM
NATIONAL BUILDERS MUTUAL

Welcome Denise McMahon | [Customer Service](#) | [Sign Out](#)

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KING'S CONSTRUCTION

- Don't see your remittance below and want to create one?
- Have a remittance file to upload?
- Want to create and save a payroll data file upload template?

News & Information
[Upload File Help Document](#)

From the Home page, select the **Employer Profile** tab.

Due Date	Status	Paid Due	Description
10/15/2010	In Prog...	!	MASONS MASTER AGREEMENT ... 10/2010
11/15/2010	Due	!	MASONS MASTER AGREEMENT ... 11/2010
12/15/2010	Due	!	MASONS MASTER AGREEMENT ... 12/2010
01/17/2011	Due	!	MASONS MASTER AGREEMENT ... 01/2011
02/15/2011	Due	!	MASONS MASTER AGREEMENT ... 201101 01/01/2011 - 01/31/2011
03/15/2011	Due		MASONS MASTER AGREEMENT ... 201102 02/01/2011 - 02/28/2011
04/15/2011	Due		MASONS MASTER AGREEMENT ... 201103 03/01/2011 - 03/31/2011

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Choose an entry method

[Continue](#) [Cancel](#)

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00:07 / 01:40

NBM NOTES & BUSINESS MANAGEMENT

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KING'S CONSTRUCTION

Primary Address

1233B GERWIG LN
COLUMBIA, MD 21046

[Your Preferences](#)

[Add Contact](#)

List of Contacts

First Name	Last Name	Generation	Title	Contact Type	Email	Phone #	Alt Phone #	Portal User
Denise	McMahon			ADMIN	dmc...	410-850-4900		Edit Delete

The Employer Profile tab allows employers to view and update their addresses, contacts, and portal users.

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00:12/01:40

The screenshot shows the NBM (Benefit Administration) Employer Profile page. At the top left is the NBM logo. To the right are navigation buttons: Home, History, and Employer Profile. The main content area displays the 'Primary Address' with a checkbox and the address: 1233B GERWIG LN, COLUMBIA, MD 21046. A callout box with an arrow points to the address, stating: 'If you have edit abilities, you can click the **Edit** icon to change the employer's address.' Below the address is an 'Add Contact' button. Underneath is a 'List of Contacts' table with columns: First Name, Last Name, Generation, Title, Contact Type, Email, and Phone #. One contact is listed: Denise McMahon, ADMIN, dmc..., 410-850-. At the bottom are 'Back' and 'Next' buttons. A video player bar at the very bottom shows a progress bar and a timestamp of 00:17/01:40.

NBM
BENEFIT ADMINISTRATION

Home History Employer Profile

☒ **Primary Address**

1233B GERWIG LN
COLUMBIA, MD 21046

If you have edit abilities, you can click the **Edit** icon to change the employer's address.

Add Contact

List of Contacts

First Name	Last Name	Generation	Title	Contact Type	Email	Phone #
Denise	McMahon			ADMIN	dmc...	410-850-

Back **Next**

00:17/01:40

The screenshot shows a software interface with a sidebar on the left containing 'Generation' and 'Records per page'. The main area features a modal dialog titled 'Edit Address' with a close button (X) in the top right corner. The dialog contains the following fields:

- Street Address 1: 1233B GERWIG LN
- Street Address 2: (empty)
- City: COLUMBIA
- State: MD - MARYLAND (dropdown menu)
- Zip Code: 21046

At the bottom of the dialog are 'Save' and 'Cancel' buttons. A tooltip box is overlaid on the right side of the dialog, containing the text: 'Change the street address lines, city, state, and zip. Click **Save** to keep the changes or **Cancel** to revert to the original address.'

Below the dialog, there are 'Back' and 'Next' buttons. At the very bottom of the screen, a video player control bar is visible, showing a play button, a progress bar, and a timestamp of 00:22 / 01:40.

NBM
NAVY MEDICAL

Home History Employer Profile

Primary Address ☒

1233B GERWIG LN
COLUMBIA, MD 21046

Add Contact

Click **Add Contact** to add a contact for the employer.

List of Contacts

First Name	Last Name	Generation	Title	Contact Type	Email	Phone #
Denise	McMahon			ADMIN	dmc...	410-850-

Back **Next**

00:27/01:40

The screenshot shows a 'Contact Information' window with the following fields and controls:

- * = Required**
- First Name ***: Text box containing 'Marie'
- Email ***: Text box containing 'msmith@cornerstone.com'
- Last Name ***: Text box containing 'Smith'
- Generation**: Text box (empty)
- Title**: Dropdown menu (empty)
- ☐ Portal User
- ☐ Send portal invitation email
- Buttons**: Back, Save, Cancel, Next

A tooltip is displayed over the 'Last Name' field with the text: 'At a minimum, add the contact's first name, last name, and e-mail address.'

At the bottom of the screen, a video player timeline shows a duration of 00:32 / 01:40.

Contact Information

* = Required

First Name * Email *

Last Name *

Generation

Title

☐ Portal User ☒ Send portal invitation email

User Role

Back **Save** **Cancel** **Next**

00:37 / 01:40

A large, semi-transparent arrow points from the text "Select this check box to invite the contact to create an EmployerXG Portal account." to the "Send portal invitation email" checkbox.

Contact Information

* = Required

First Name *	Email *
Marie	msmith@cornerstone.com
Last Name *	Phone Number
Smith	
Generation	Phone Number(Alt)
Title	

☐ Portal User

☒ Send portal invitation email

User Role

Administrator

Operator

Operator - No Bank Access

Operator - History Only

Select a role for the user.
The role will affect
EmployerXG Portal access.

00:42 / 01:40

Contact Information

* = Required

First Name *	Email *
Marie	msmith@cornerstone.com
Last Name *	Phone Number
Smith	
Generation	Phone Number(Alt)
Title	
☐ Portal User	☒ Send portal invitation email
User Role	

After the contact creates an EmployerXG Portal account, this check box will be selected.
If selected, clearing the check box will disable the user.

Back Save Cancel Next

00:47 / 01:40

Contact Information

* = Required

First Name *	Email *
Marie	msmith@cornerstone.com
Last Name *	Phone Number
Smith	
Generation	Phone Number(Alt)
Title	

☐ Portal User

☒ Send portal invitation email

User Role

Click **Save** to save the information.

Back **Save** **Cancel** **Next**

00:52 / 01:40

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KING'S CONSTRUCTION [Your Preferences](#)

Primary Address ☒
1233B GERWIG LN
COLUMBIA, MD 21046

Add Contact

List of Contacts

First Name	Last Name	Generation	Title	Contact Type	Email	Phone #	Alt Phone #	Portal User	
Denise	McMahon			ADMIN	dmc...	410-850-4900		☒	Edit Delete
Marie	Smith				mami...				Edit Delete

The new contact appears in the list.

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00:57 / 01:40

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KING'S CONSTRUCTION 

[Your Preferences](#)

Primary Address 

1233B GERWIG LN
COLUMBIA, MD 21046

[Add Contact](#)

List of Contacts

First Name	Last Name	Generation	Title	Contact Type	Email	Phone #	Alt Phone #	Portal User	
Denise	McMahon			ADMIN	dmc...	410-880-4900			 Edit  Delete
Marie	Smith				msmi...				 Edit  Delete

Update or delete an existing contact by clicking the **Edit** or **Delete** icon.

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01:02 / 01:40

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KING'S CONSTRUCTION

Primary Address ☒ [Your Preferences](#)

12330 GERWIG LN
COLUMBIA, MD 21045

[Add Contact](#)

List of Contacts

First Name	Last Name	Generation	Title	Contact Type	Email	Phone #	Alt Phone #	Portal User
Denise	McMahon			ADMIN	dmc...	410-850-4900		☒
Norie	Smith				nsm...			

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Click Your Preferences to edit employer settings.

Your Preferences [X]

Display Preferences

Copy Remittance Options

Employee ID, Name, and Quantities [X] [v]
Employee ID, Name, and Quantities
Employee ID and Name

Alert Preferences

Scheduled Payment Confirmation

Primary Contact [v]

Remittance Processed Alert

Primary Contact [v]

[Back] [Save] [Cancel] [Next]

Determines the data that is copied to a new remittance when users copy a processed remittance.

01:12/01:40

Your Preferences

Display Preferences

Copy Remittance Options
Employee ID, Name, and Quantities

Default Group
Select a Group...

Alert Preferences

Scheduled Payment Confirmation
Primary Contact

Remittance Processed Alert
Primary Contact
Primary Contact
Employer Administrators
All Portal Users

Determines which contacts get an e-mail when a remittance is processed.

Back Save Cancel Next

01:22 / 01:40

Your Preferences

Display Preferences

Copy Remittance Options
Employee ID, Name, and Quantities

Default Group
Select a Group...

Alert Preferences

Scheduled Payment Confirmation
Primary Contact

Remittance Process
Primary Contact

Click **Save** when finished setting preferences.

Back Save Cancel Next

01:27 / 01:40



