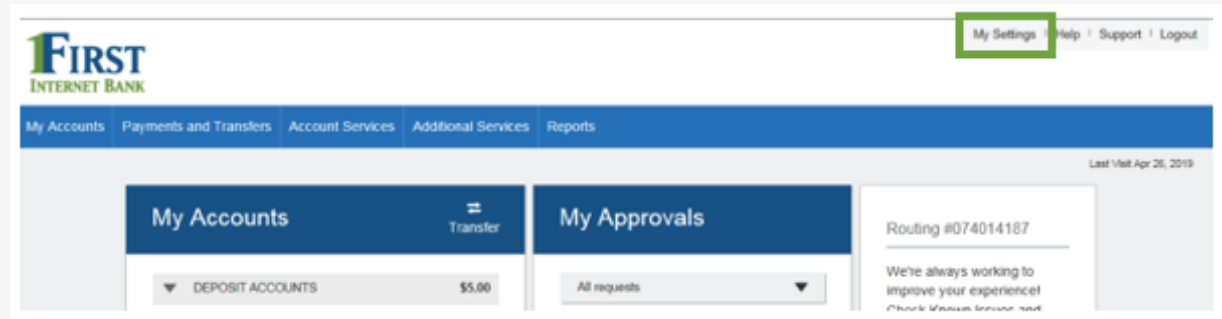


# **BUSINESS BANKING**

## **MY SETTINGS**



At First Internet Bank our goal is to make online banking simple. We hope you find our instructional materials useful as you begin to take advantage of our platform capabilities.



The My Settings page in Business Banking is very similar to My Settings in Online Banking, yet there are a few key differences:

**My Settings** allows a user to manage their Business Banking personal information and preferences, including:

- Contact information
- Username and Password
- Security settings

ONLINE BANKING MY SETTINGS	BUSINESS BANKING MY SETTINGS
User sees ID below first/last name	User ID does not display
User chooses username during registration; can edit here	System assigns username; user should edit here
No section for Business Information	Business Information displays
User has access to Rename & Hide accounts	Only Primary and Secondary Admins can access Rename & Hide accounts

## PERSONAL INFORMATION

### 1. Update Email

- Used for system-generated notifications, user-elected alerts, and possibly multi-factor authentication (MFA).
- One allowed per user.

### 2. Update Username

- For ease and security, users should update their system-assigned Username.
- Must be unique from all other business users and Online Banking users at FirstIB.

### 3. Update Password.

### Personal information

---

**Liz Walker**

Primary email | [Edit](#) **1** april.delac@ncr.com

**Business Information** Classy Catering  
Business ID: 4265267369

123 Test  
Athens, GA 30606  
(706) 612-5620

**NOTE:**  
Business information is not editable here; FirstIB can update it in Admin Platform.

### Login & Security

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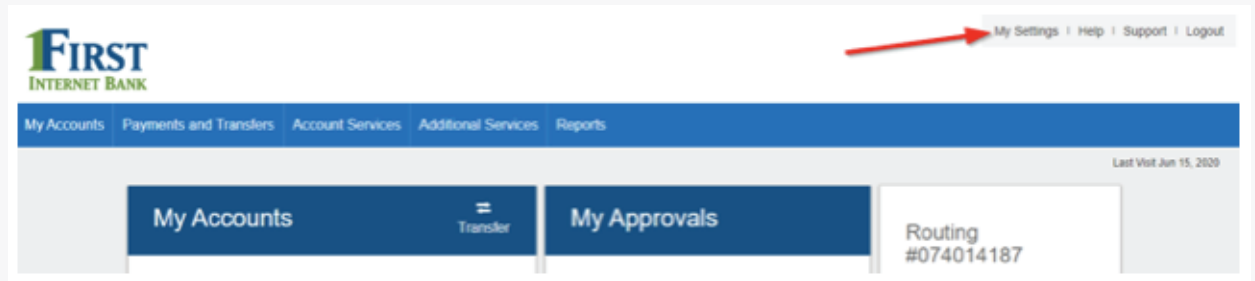
Username | [Edit](#) **2** lwalker

Password | [Edit](#) **3** \*\*\*\*\*

## LOGIN & SECURITY

These settings impact Multi-Factor Authentication (MFA) for login, and in-session authentication for approvals.

1. On the Overview screen, the user can enable a phone to receive the code via text.



The screenshot shows the top navigation bar of the First Internet Bank website. The logo "FIRST INTERNET BANK" is on the left. On the right, there are links for "My Settings", "Help", "Support", and "Logout", with a red arrow pointing to "My Settings". Below the logo is a blue navigation bar with tabs for "My Accounts", "Payments and Transfers", "Account Services", "Additional Services", and "Reports". Below this is a grey bar with "My Accounts" and "My Approvals" buttons, a "Transfer" icon, and a "Routing #074014187" box. The text "Last Visit Jun 15, 2020" is on the right.

### Login & Security

Username | [Edit](#)

XXXXXXXXXX

Password | [Edit](#)

\*\*\*\*\*

Security options | [Edit](#)

XXXXXXXXXX | Enable for text

1

XXXXXXXXXX | Text enabled

Token access activated [?](#)

## LOGIN & SECURITY

2. Update the phone or add a second one (2 max).
3. Enter the credential ID for a soft token (shows only if Financial Institution offers tokens).
4. Toggle email on if desired (shows only if FirstIB offers email as an MFA option). Used for login only; i.e. not an option for approving users or payments.
5. When editing any of the above, enter current password for authentication.
6. Click **Save**.

o

### Confirming your identity

If we do not recognize your computer or device, we confirm your identity by one of the methods below.

#### By phone

Confirm your identity by responding to a text or call to a phone you have handy.

+1 ▼  ×

+1 ▼  ×

2

#### By security token

Use a VIP Access™ token to confirm your identity.

3

- ▶ Where can I find the credential ID?
- ▶ What is VIP Access™ token, and how does it work?
- ▶ How do I get a VIP Access™ token?

#### By email

OFF

4

Receive one-time security codes by your primary email address, [\[redacted email\]](#).  
[Update primary email](#)

#### Current password

SHOW

5

Save

Cancel

6

## BILL PAY LOGIN

If Bill Pay in Business Banking has been set up this business, enter the username and password for Bill Pay here. Detailed training for business Bill Pay is in the Online Training Library.

Bill Pay Login

⚠ Please enter credentials provided to you during Bill Pay registration process.

Bill Pay Username  
+ Add username & password

Bill Pay Password  
+ Add username & password

Other settings  
[Rename & Hide your accounts](#) [Alerts & Notifications](#)

## RENAME & HIDE YOUR ACCOUNTS

Only Primary and Secondary Admin(s) see the **Rename & Hide your accounts** option, which allows business admins to assign account nicknames. Select the Tax ID to see all linked accounts.

Rename & Hide your accounts

Here you can rename your accounts and hide your accounts to exclude them from everywhere. Do not include Account Numbers, Social Security Numbers or other confidential information in your new account name. Changes you make are saved automatically.

Note: Please do not hide accounts that have scheduled transfers. Scheduled transfers to and/or from hidden accounts may not process.

Tax ID Pottery Place

Your accounts	Rename account to	Show account
Deposit Accounts		
Simulator Checking *0001	Operating Account	<input checked="" type="checkbox"/>
Simulator Savings *0002		<input checked="" type="checkbox"/>
Simulator Money M... *0		<input checked="" type="checkbox"/>
Loan Accounts		
Simulator Credit ... *0004		<input checked="" type="checkbox"/>
Simulator Loan *0005	Commercial Loan	<input checked="" type="checkbox"/>

**TIP:**  
Hide an account on the Home page by unchecking **Show Account**.

## ALERTS & NOTIFICATIONS

Default alerts display for first-time users with the option to add an alert. If already in use, the business user's established alerts display.

Additional Services Reports

- Manage Users
- Bill Pay
- Online Statements
- Remote Deposit
- Stop Payment
- Alerts & Notifications
- System Notifications

Other settings

[Rename & Hide your accounts](#) [Alerts & Notifications](#)

Tax ID Pottery Place

Email alerts are sent to

[apatt@potteryplace.com](mailto:apatt@potteryplace.com)

Update

Alert Type	
<input checked="" type="checkbox"/> Large withdrawal If a withdrawal in ▼ exceeds	\$ 10000
<input type="checkbox"/> Large deposit If a deposit in ▼ exceeds	
<input checked="" type="checkbox"/> Balance update Once a week on Friday ▼ send me the balance of ▼	
<input type="checkbox"/> Low balance If Operating Account - *0001 ▼ falls below	

Which alert would you like to add?

**Accounts**

- [Balance update](#)

**Activity**

- Low balance
- High balance
- Large withdrawal
- Large deposit
- Check cleared

**Reminders**

- Loan payment due
- Loan payment overdue
- Maturity date
- Personal message



**TIP:**

Text alerts are **NOT** an option in Business Banking.