FIRST MERCHANTS COMMERCIAL BANKING Account Labels Online Banking User Guide

Businesses with several accounts can take advantage of the labeling feature which allows you to group accounts. This can be found under the Policies section under Admin Tools. Labeled accounts will be visible throughout the Online Banking solution for easier navigation and quick access.

To create a new Account Label

- 1. In the navigation menu, select the Admin Tools menu option.
- 2. Select the Policies tile.

Fir He	Merchants Bank ing you prosper	Good Afternoon, Chris Client
Home	Transfers and Payments Services Information Reporting User Settings Admin Tools Connect With Us Log Off	
Adr	in Tools	
	ADMIN TOOLS	_
	Busers User Roles Manage permissions for transactions, features, & accounts per user role Manage user roles	
	Dolicies Manage permissions for transactions, features & accounts at a company level	_

- 3. Select the Accounts tab.
- 4. Select the check boxes of each account for which you want to create an Account Label.
- 5. Select Edit Labels.

ACCOUNTS	0					
	🖉 Edit Labels					1 of 1 selected accounts shown
Number	Name	View	Deposit	Withdraw	Labels	
XXXX1123	30 90 DAY CD	\checkmark	\checkmark	\checkmark		
XXXX77777	COMMERCIAL ANALYSIS CHKG	\checkmark	\checkmark	\checkmark	Engineering label \times	
XXXX8888	COMMERCIAL ANALYSIS CHKG	\checkmark	\checkmark	\checkmark	Marketing label $ imes $	
XXXX4321	4321 Operating Account	\checkmark	\checkmark	\checkmark		
XXXX8999	COMMERCIAL LOAN	\checkmark	\checkmark	\checkmark		
XXXX6666	COMMERCIAL SAVINGS	\checkmark	\checkmark	\checkmark		
XXXX3456	CREDIT CARD	\checkmark	\checkmark	\checkmark		
						Save



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- 6. Enter the name of the new label.
- 7. Select Create.

Sample	Create
Select all	
	Add
	Remove

8. Select Save to assign that label to the selected account(s).



