



## A new mobile app and online banking experience

In early 2024, you'll have access to a new mobile app and online banking experience with new features, more convenience, and enhanced security. In addition, you'll have expanded tools to optimize cash management efficiencies and the same capabilities in both your mobile app and online banking. Watch your email for more information and timelines.

## Action Needed

1. Make sure your phone number and email address are up to date. It's important for you to receive instructions to prepare and continue to have access to your accounts.
2. Delete inactive users (click to learn how) and inactive ACH and wire templates.

### It is easy to update or verify your contact information.

For Administrators to update user email and phone details:

**Admin Step 1:** Make edits and Save. From the navigation, click **Administration > Company Administration**

The screenshot displays the First Merchants Bank online banking interface. The navigation menu at the top includes: Welcome, Reports, Money Movement, Administration, and Account Services. The Administration menu is expanded, showing options for Communications, Company Administration (highlighted with a red box), Self Administration, and Service Administration. The main content area is divided into several sections:

- Important Account Balances:** A table showing balances as of 11/28/2023 for two Business Money Market accounts.
- Exception Decisions:** A table with columns for Check Exceptions, ID, Amount, Date, and Balance.
- Issues & Issue Files Approval:** A section with radio buttons for My Approvals and All Approvals.
- Transfers and Payments Approval:** A section with radio buttons for My Approvals and All Approvals, and a table for Internal Transfers.
- Alerts and Messages:** A list of alerts including ACH Transaction Returned for Edit, User Telephone Number Changed, Issue File FTP Successful, and Password Change.
- Saved Reports:** A section with a link to view saved reports.

A "Got Questions? We can help!" button is located at the bottom right of the interface.



**Admin Step 2:** Under **Manage Existing Users**, select the user ID for the user that needs updated.

**Company Administration**

Manage Users | Account Information | Express Account Management | Approval Settings | User Setup Report | Invalid Login Report | ACH File SEC Codes

### User Administration

Review the options listed below for available user administration tasks. To quickly entitle a new account for company users, go to [Express Account Management](#).

**Create New User**

You will have an opportunity to copy an existing user during the process.

[Create New User](#)

**Manage Existing Users**

To manage a user's profile, roles, services & accounts, system access, or change limits, click on the appropriate user ID.

User ID	First Name	Last Name	Status	System Access
csmith007	Christopher	Smith	Active	<a href="#">System Access</a>
emjackson23	Ethan	Jackson	Active	<a href="#">System Access</a>
gabbym247	Gabby	Monteverde	Active	<a href="#">System Access</a>
bobparker42	Robert	Parker	Active	<a href="#">System Access</a>

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**Admin Step 3:** Click **Edit**. Click the **edit icon** next to **User Information**

**Company Administration**

Manage Users | Account Information | Express Account Management | Approval Settings | User Setup Report | Invalid Login Report | ACH File SEC Codes

[Back](#) **User Details**

### User Profile

To edit the user's profile, click the appropriate edit link. To delete this user's profile, click "Delete User". To modify the user's system access, click the edit link for User Information.

**User Information**

Name: Christopher Smith  
 User ID: csmith007  
 User Status: Active

**Contact Information**

Primary Email Address: csmithbarber@gmail.com  
 Secondary Email Address: chris.barber@yahoo.com  
 Phone Number: (813) 949-1747

**Roles**

Roles

Administration

Setup

[Got Questions? We can help!](#) +



## Admin Step 4: Add or edit an email address

Under **User Email Address**, you can **add** or **edit** the primary and secondary email address by clicking into the input field.

## Add a phone number

Under **User Telephone Number**, click the blue text to add an additional telephone number.

Click **Save** when edits are completed.

## Remove a phone number

Under **User Telephone Number**, click the **X icon** next to the extension input field.

Click **Save** when edits are completed.

The screenshot displays the 'Company Administration' section of the First Merchants Bank user interface. The user is logged in as 'demo user' with a last login of 'Nov 27, 2023 10:28 AM ET'. The navigation menu includes 'Welcome', 'Reports', 'Money Movement', 'Administration', and 'Account Services'. The 'Company Administration' section is active, showing options for 'Manage Users', 'Account Information', 'Express Account Management', 'Approval Settings', 'User Setup Report', 'Invalid Login Report', and 'ACH File SEC Codes'. The 'Edit Contact Information' page is shown for user 'Christopher Smith'. Under 'User E-mail Address', there are two input fields containing 'csmithbarber@gmail.com' and 'chris.barber@yahoo.com'. Under 'User Telephone Number', there is a table with two entries:

Label	Country/Region	Area/City Code & Number	Extension
HOME	AFGHANISTAN	(813) 949-1747	
MOBILE	AFGHANISTAN	(813) 738-5588	

Below the table, there is a link to 'Add additional telephone number'. A 'Got Questions? We can help!' button is located at the bottom right.

Need help or prefer to speak with someone? You can call our Treasury Solutions Center directly at 1.866.833.0050. The Treasury Solutions Center team is available: Monday thru Friday 8:00 AM - 6:00 PM EST.