



# First Merchants Small Business

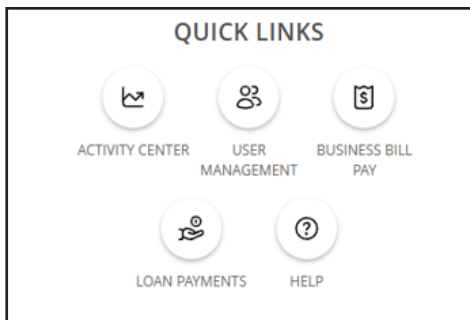
## Online Banking Guide

### Online Banking

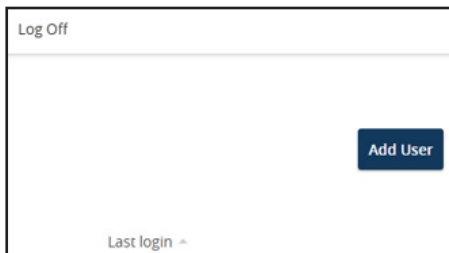
This document will serve as a guide to help you navigate through some of the most common tasks within your business online banking experience. Should you have additional questions, or need assistance, you can always reach out to us at 1-800-205-3464.

### Adding A User

1. Click on the “User Management” Quick Link, located in the Quick Links content block. Enter your **Login ID**.



2. Click on the blue “Add User” button located on the far-right side of the screen.



3. Enter the required personal details for the new user, including: First Name, Last Name, Email Address, Phone Country, and Phone Number.

A screenshot of the 'New User Details' form. At the top is a navigation menu with links: Home, Transfers and Payments, Services, Information Reporting, User Settings, Admin Tools, Connect With Us, and Log Off. Below the menu is the title 'New User Details' and the section header 'PERSONAL DETAILS'. The form contains five input fields: 'First Name', 'Last Name', 'Email Address', 'Phone Country' (a dropdown menu with 'Select Country' visible), and 'Phone'.

4. Enter the appropriate login details for the new user.
5. Click the blue “Save New User Details” button located in lower right corner of the screen.





# First Merchants Small Business

## Online Banking Guide

### Adding A User Continued...

4. Enter the appropriate login details for the new user.

LOGIN DETAILS

Login ID Password Confirm Password

Discard New User Details Save New User Details

5. Click the blue “Save New User Details” button located in lower right corner of the screen.

New User Details Save New User Details

### Entitle Account Access For A User

1. Click on “Admin Tools” from the tool bar across the top of your screen.

tion Reporting User Settings Admin Tools Connect With Us

RECENT ACTIVITY

2. Select the “User Management” tile.

Admin Tools

ADMIN TOOLS

User Management  
Manage permissions for transactions, features, & accounts per user role

3. Identify which user you would like to enable, and click the “Edit” icon, that looks like a pencil.

Last login ^		
2 hours ago		
2 months ago		



**First Merchants**  
Helping you prosper



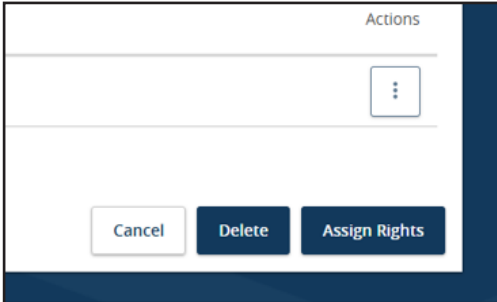


# First Merchants Small Business

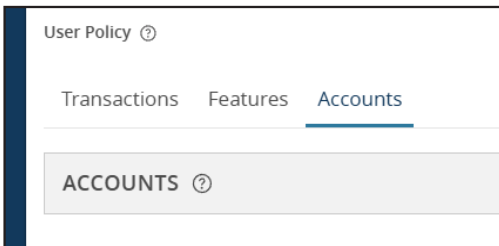
## Online Banking Guide

### Entitle Account Access For A User Continued...

4. Click the “Assign Rights” button in the lower right corner of the screen.



5. Click on the “Accounts” tab to open the user account access screen.

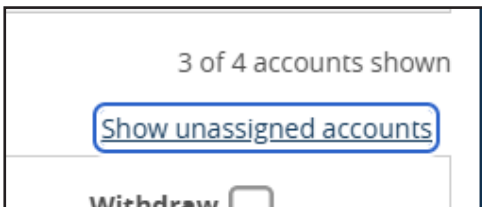


6. Select the appropriate check boxes for the desired account, to be able to View, Deposit and/or Withdraw.

[Show unassigned.](#)

Name	View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
GENERAL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

7. Click the blue “Show unassigned accounts” on the right side of the screen.





# First Merchants Small Business

## Online Banking Guide

### Entitle Account Access For A User Continued...

8. Click on the desired icon to enable View, Deposit, and/or Withdraw rights, for each unique account, as desired.

4 of 4 accounts shown		
<a href="#">Hide unassigned accounts</a>		
View <input type="checkbox"/>	Deposit <input type="checkbox"/>	Withdraw <input type="checkbox"/>
✓	✓	✓
✓	✓	✓
✓	⊘	⊘
⊘	⊘	⊘

**Save**

9. Be sure to click the save button at the upper or lower part of your screen.

**Save**

3 of 4 accounts shown

[Show unassigned accounts](#)

Withdraw

✓

✓

⊘

**Save**



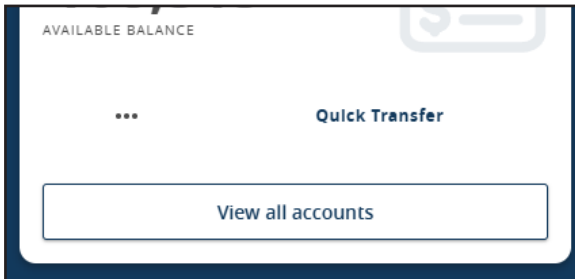


# First Merchants Small Business

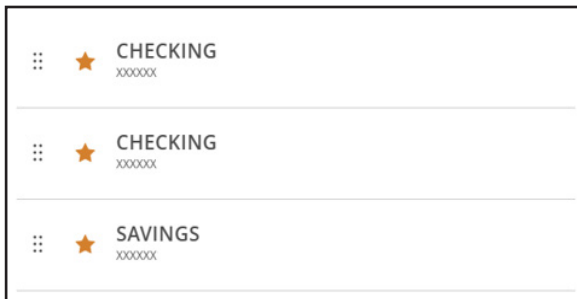
## Online Banking Guide

### Adding An Account To Your Home Screen

1. Click on the “View all accounts” button located at the bottom of the ACCOUNTS content block.



2. Click on the star icon, located to the left of each account name, to make the account a “favorite” and it will then display on your dashboard.



3. Click “Home” and your account should now be listed within the ACCOUNT content block.

### Enroll in eStatements

1. Click on “Services” from the toolbar across the top of your screen.
2. Click on the “eStatement Enrollment” tile.
3. Click on the blue “Get Code” button and follow the instructions provided on the screen.
4. Once verified, a list of available accounts will appear.
5. Choose the delivery type for each account, paper or electronic.
6. Once eStatement delivery is selected, you will receive the Electronic Document and Disclosure Agreement.
7. Check “I Accept” the disclosure to change delivery method to eStatement.
8. Make sure to open a digital statement to complete the process and halt any future fees for paper statements.



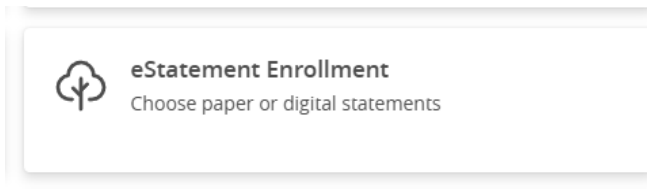


# First Merchants Small Business

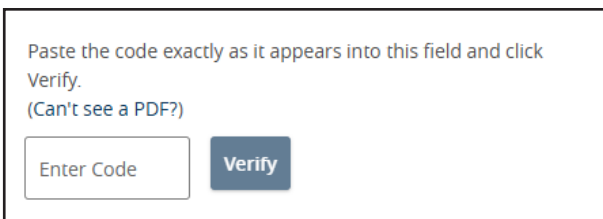
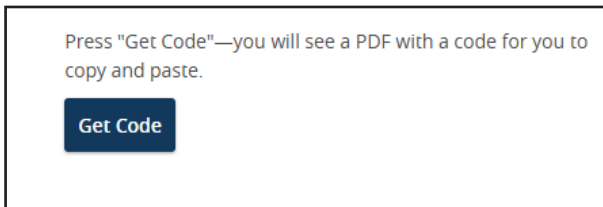
## Online Banking Guide

### Enroll in eStatements

1. Click on “Services” from the toolbar across the top of your screen.
2. Click on the “eStatement Enrollment” tile.



3. Click on the blue “Get Code” button and follow the instructions provided on the screen.



4. Once verified, a list of available accounts will appear.
5. Choose the delivery type for each account, paper or electronic.

#### Statement Delivery

Account	Delivery Type	Address	
CAREFREE CHRG XXXXXX4444	Paper Statement	Address on File	
CAREFREE CHRG XXXXXX8888	Paper Statement	Address on File	
COMM ANALYSIS CHRG XXXXXX8226	eStatement		
COMM ANALYSIS CHRG XXXXXX1360	eStatement		
MORRIS MOTORS LOC XXXXXX8803	eStatement		

6. Once eStatement delivery is selected, you will receive the Electronic Document and Disclosure Agreement.
7. Check “I Accept” the disclosure to change delivery method to eStatement.
8. Make sure to open a digital statement to complete the process and halt any future fees for paper statements.



**First Merchants**  
Helping you prosper

