

USER ADMINISTRATION USER GUIDE

At First Internet Bank, our goal is to make your online business banking simple. We hope you will find these instruction materials useful as you begin taking advantage of our online business banking capabilities.



USER ADMINISTRATION USER GUIDE

After the primary user enrolls for the company, they can add additional sub-users who will have access to their accounts.

Under the Tools header, Access Manager displays a list of any existing sub-users they have already created. It will also list the primary user themselves as the "Account owner." A sub-user can also have one of several statuses in the Status column:

- **Active:** The user has successfully set up their profile
- **Pending:** The user has been added but has not finished the enrollment process
- **Deactivated:** The user has been deactivated in the system and will not be able to log in. Primary users can deactivate other users by clicking on the user in the list and selecting "Deactivate user" in the top right

< Edit permissions

User info Deactivate user

First name
Any

Last name
Name

To add new sub-users, primary user should select "Add a new user" button.

Team Add a new user

Q Search members Filters


NAME	EMAIL	ROLE	STATUS	LAST LOGIN
Any Name	anyemail@outlook.com	Admin	Active	3/14/2022
Any Company	anycompanyemail@outlook.com	Account owner	Active	2/1/2023
Any Name	anyemail@outlook.com	Collaborator	Active	5/5/2022

The required fields for adding a new user include first name, last name, email and phone number. A phone number that is enabled for text messages should be used so that the sub-user can receive two-factor authentication messages to their phone.


Primary user can select one of three Access Levels for the new sub-user:

- **Admin:** Will give the sub-user the same access as the primary user
- **Collaborator:** Allows the primary user to customize the accounts and permissions the sub-user will have
- **Viewer:** Gives the sub-user view-only access to the accounts selected


Collaborator customization looks like this:

Admin 

Full access including adding new users and managing existing ones

Collaborator 

Customize your teammate's access to specific features

Viewer 

View information, excluding statements, on selected accounts

Access

Accounts

Free - [REDACTED]

Basic Commercial Checking - [REDACTED]

Free - [REDACTED]

External Accounts

External Test Account

JPMORGAN CHASE *****[REDACTED]

Varo Bank Account

Permissions

MONEY MOVEMENT

Make internal transfers

Make external transfers

Send wires

Pay bills via bill pay

Add, edit, or delete recipients for bill pay

Make mobile check deposits

Approve transactions with dual approvals

Cancel [Send invite](#)

Viewer customization is identical to Collaborator customization, except the Viewer role will not give options to add any permissions.

Once the user has been updated, the primary user will select "Send invite." This will send an email invitation to the new sub-user, which will have further login instructions.