

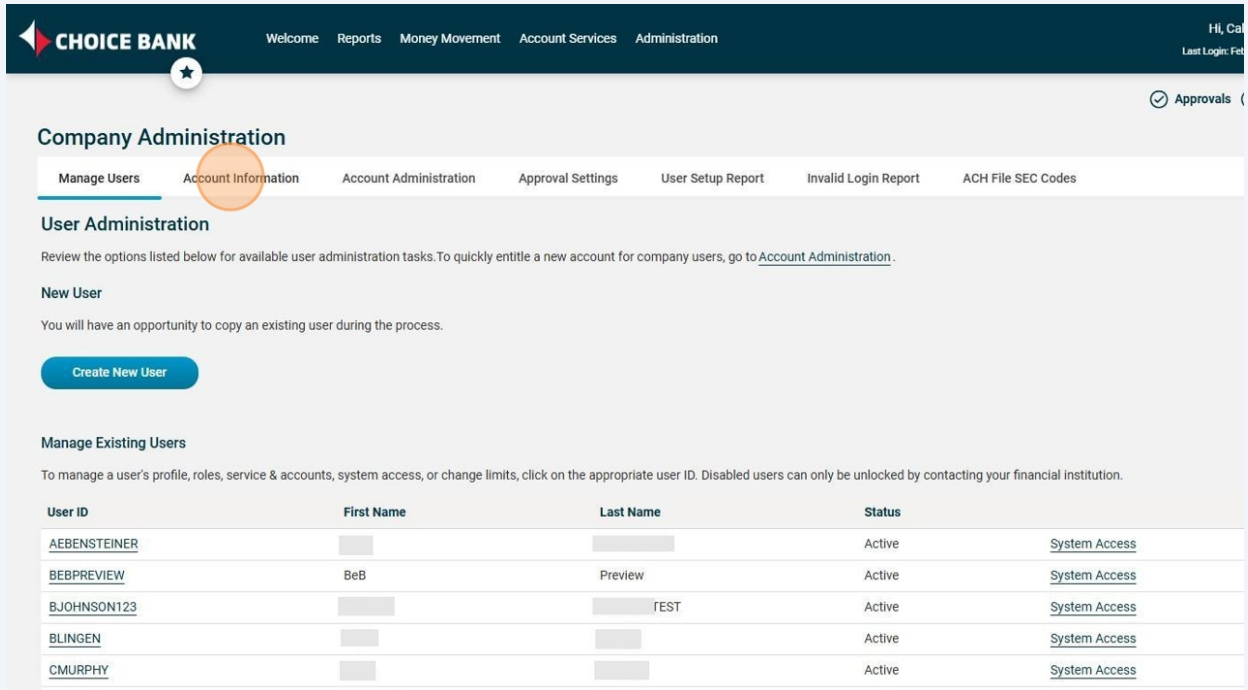
How to Nickname Accounts



1 Click "Company Administration"

The screenshot shows the CHOICE BANK user interface. At the top, a dark blue navigation bar contains the bank's logo, a star icon, and links for Welcome, Reports, Money Movement, Account Services, and Administration. On the right side of the bar, it says "Hi, Cally | SignOff" and "Last Login: Feb 13, 2025, 10:52:04". Below the navigation bar, the "Administration" section is active, showing sub-links for Change Password, Personal Preferences, and User Activity Report. A dropdown menu is open from the "Administration" link, listing options: Communications, Company Administration (highlighted with an orange circle), Self Administration, Service Administration, and Manage Mobile Banking Settings. The "Change Password" sub-link is selected, displaying a form with fields for "Current Password", "New Password", and "Confirm Password", each with a toggle icon. At the bottom of the form are "Update Password" and "Cancel" buttons. On the right side of the page, there are links for "Approvals" and "Exceptions".

2 Click "Account Information"



The screenshot shows the CHOICE BANK Administration interface. The top navigation bar includes links for Welcome, Reports, Money Movement, Account Services, and Administration. The 'Account Information' tab is highlighted with an orange circle. Below the navigation bar, the 'Company Administration' section is visible, with sub-tabs for Manage Users, Account Information, Account Administration, Approval Settings, User Setup Report, Invalid Login Report, and ACH File SEC Codes. The 'User Administration' section is active, displaying a 'New User' button and a table of existing users.

Company Administration

User Administration

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

New User

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

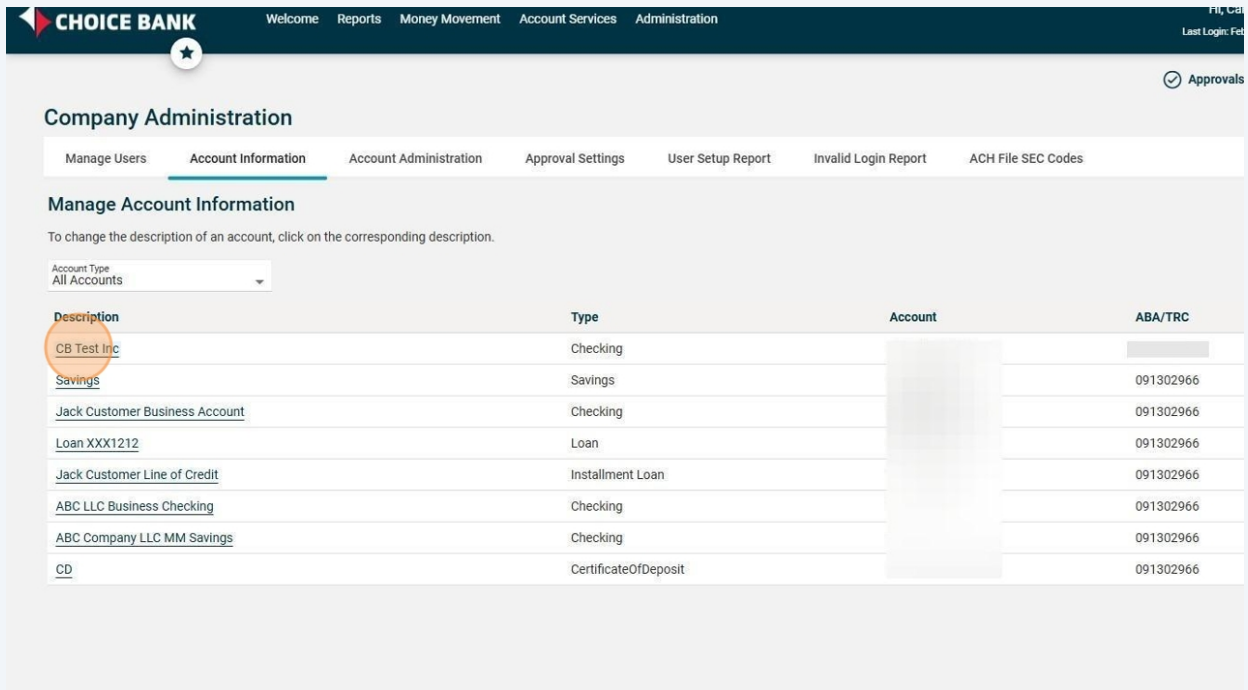
[Create New User](#)

Manage Existing Users

To manage a user's profile, roles, service & accounts, system access, or change limits, click on the appropriate user ID. Disabled users can only be unlocked by contacting your financial institution.

User ID	First Name	Last Name	Status	
AEBENSTEINER			Active	System Access
BEBPREVIEW	BeB	Preview	Active	System Access
BJOHNSON123		TEST	Active	System Access
BLINGEN			Active	System Access
CMURPHY			Active	System Access

3 Click the name of the account you want to change.



The screenshot shows the CHOICE BANK Administration interface. The top navigation bar includes links for Welcome, Reports, Money Movement, Account Services, and Administration. The 'Account Information' tab is highlighted with an orange circle. Below the navigation bar, the 'Company Administration' section is visible, with sub-tabs for Manage Users, Account Information, Account Administration, Approval Settings, User Setup Report, Invalid Login Report, and ACH File SEC Codes. The 'Manage Account Information' section is active, displaying a dropdown menu for Account Type and a table of accounts.

Company Administration

Manage Account Information

To change the description of an account, click on the corresponding description.

Account Type: All Accounts

Description	Type	Account	ABA/TRC
CB Test Inc	Checking		
Savings	Savings		091302966
Jack Customer Business Account	Checking		091302966
Loan XXX1212	Loan		091302966
Jack Customer Line of Credit	Installment Loan		091302966
ABC LLC Business Checking	Checking		091302966
ABC Company LLC MM Savings	Checking		091302966
CD	CertificateOfDeposit		091302966

4 Click into the description and type what you would like the account to be titled.

CHOICE BANK Welcome Reports Money Movement Account Services Administration Last Login: Feb 2024

Approvals

Company Administration

Manage Users Account Information Account Administration Approval Settings User Setup Report Invalid Login Report ACH File SEC Codes

Change Account Description

Please make the required changes and click "Save Changes". To return to the list of accounts go to [Account Administration](#).

Account Information

TRC: 091302966
Account Number: 0012121212
Account Type: Checking
Description: CB Test Inc

[Save Changes](#) [Do not save changes](#)

5 Click "Save Changes"

CHOICE BANK Welcome Reports Money Movement Account Services Administration Last Login: Feb 2024

Approvals

Company Administration

Manage Users Account Information Account Administration Approval Settings User Setup Report Invalid Login Report ACH File SEC Codes

Change Account Description

Please make the required changes and click "Save Changes". To return to the list of accounts go to [Account Administration](#).

Account Information

TRC: 091302966
Account Number: 0012121212
Account Type: Checking
Description: Test

[Save Changes](#) [Do not save changes](#)

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