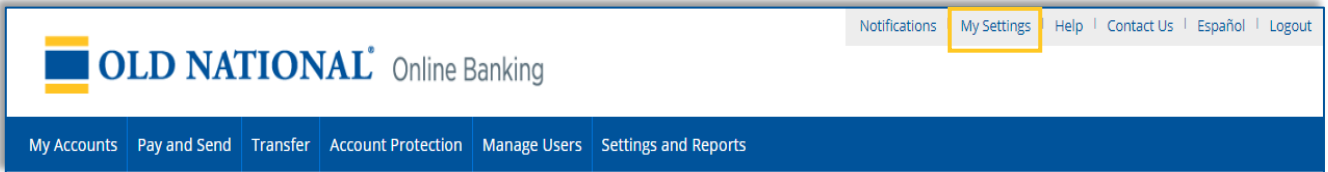


Business users can manage their profile via My Settings.



The screenshot displays the "Personal information" and "Login & Security" sections of the user settings page. Callout boxes provide additional context for specific fields:

- Personal information:**
  - Name:** Liz Walker
  - Primary email | [Edit](#)**: liz@classycatering.com
  - Business Information:** Classy Catering, Business ID: 4265267369
- Login & Security:**
  - Username | [Edit](#)**: lwalker
  - Password | [Edit](#)**: \*\*\*\*\*
  - Security options | [Edit](#)**: (828) [redacted] | Enable for text ▼

**Callout 1:** Edit Email – used for system-generated notifications, user-elected alerts, and possibly login MFA. One allowed per user

**Callout 2:** Edit Username and Password

**Callout 3:** Security Options – text enable a phone for MFA. Click Edit for more options (next page).

**Security Options**

These settings impact login authentication and in-session authentication for approvals.

The screenshot shows the 'Confirming your identity' settings page. It includes sections for 'By phone', 'By security token', 'By authenticator', 'By email', and 'Current password'. Callout boxes provide additional information: 'Manage phone numbers (up to 4, set by FI)' points to the phone number input fields; 'Token - enter the credential ID (shows only if FI offers tokens)' points to the security token input field; 'Authenticator - an app the user downloads to generate a one-time access code (Google Authenticator and Microsoft Authenticator are suggested)' points to the authenticator section; 'Email - toggle on to use email for login MFA, not an option for approving payments/users (shows only if FI offers email for MFA)' points to the email toggle; and 'Enter password to save any edits' points to the current password input field.

## Security Options

Back on the main My Settings page, the user has an additional step to setting up Authenticator. They must open the app on their phone, and either scan the QR code on the screen or enter the code manually into their authenticator app.

**Security options** | [Edit](#)

(828) [REDACTED] | Enable for text ▼

(828) [REDACTED] | Enable for text ▼


liz@classycatering.com

Token access activated ⓘ

Authenticator Code Activated | Display Code ▲

---

Scan this QR code with your authenticator app



-OR-

Enter this code into your authenticator app

---

**Rename & Hide your accounts**

Only Primary and Secondary Admin(s) see the “Rename & Hide your accounts” option at the bottom of My Settings.

Other settings

[Rename & Hide your accounts](#)

[Alerts & Notifications](#)

Alerts & Notifications is covered in the [Alerts Quick Help Guide](#).

**Rename & Hide your accounts**

Here you can rename your accounts and hide your accounts to exclude them from everywhere. include Account Numbers, Social Security Numbers or other confidential information in your new name. Changes you make are saved automatically.

Note: Please do not hide accounts that have scheduled transfers. Scheduled transfers to and/or accounts may not process.

Tax ID Pottery Place

Your accounts	Rename account to	Show account
<b>Deposit Accounts</b>		
Simulator Checking *0001	Operating Account	<input checked="" type="checkbox"/>
Simulator Savings *0002	Savings	<input checked="" type="checkbox"/>
Simulator Money M... *0003	Money Market	<input type="checkbox"/>
<b>Loan Accounts</b>		
Simulator Credit ... *0004	Business Credit Card	<input type="checkbox"/>
Simulator Loan *0005	Commercial Loan	<input type="checkbox"/>

Select the Tax ID to see all linked accounts.

**Rename** accounts to help distinguish accounts with nicknames

**Hide** an account throughout Business Banking by unchecking “Show Account”.