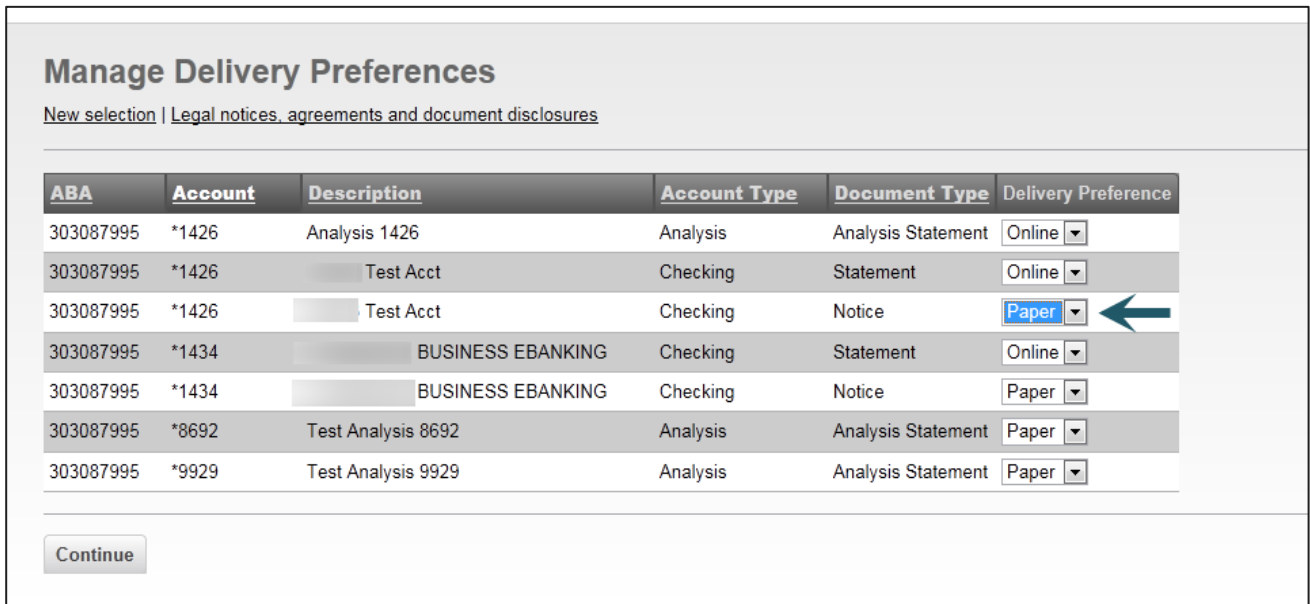# iManage Business Express® and iManage Business Banking®
Online Statements and Documents Enrollment Guide

To enroll in online documents, including eStatements and eNotices, the Administrator should complete the following steps after logging into iManage Business Express® (iMBX) or iManage Business Banking® (iMBB):

1. From the **Reports** menu, select **Statements & Documents**.

2. The **Search Statement and Documents** page is displayed. Click the View and maintain document preferences link.

Search Statements and Documents

View and maintain document preferences | Legal notices, agreements and document disclosures
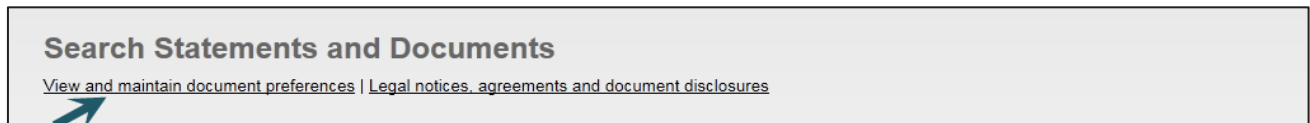
3. Select **Online** as the Delivery Preference for the Account Statement, Analysis Statement and/or Notice for each account.

Manage Delivery Preferences

New selection | Legal notices, agreements and document disclosures

ABA	Account	Description	Account Type	Document Type	Delivery Preference
303087995	*1426	Analysis 1426	Analysis	Analysis Statement	Online
303087995	*1426	Test Acct	Checking	Statement	Online
303087995	*1426	Test Acct	Checking	Notice	Paper
303087995	*1434	BUSINESS EBANKING	Checking	Statement	Online
303087995	*1434	BUSINESS EBANKING	Checking	Notice	Paper
303087995	*8692	Test Analysis 8692	Analysis	Analysis Statement	Paper
303087995	*9929	Test Analysis 9929	Analysis	Analysis Statement	Paper

Continue

4. Click the **Continue** button.

5. The **Statements and Documents – Service Agreement** will appear. After reading the Agreement, click the **I agree** button.

> iManage Business Express® and iManage Business Banking®
> Statements and Documents – Service Agreement
>
> **Consent and Agreement to Electronic Statements and Disclosures.** Please carefully review and print for your records the information on this screen before selecting the "I agree" button, as it contains important information about receiving electronic statements and disclosures ("Service"). The Service is available through iManage Business Express ("iMBX") and iManage Business Banking ("iMBB"). For purposes of the Service, electronic statements and disclosures, including Account Analysis Composite Statements are collectively referred to as "eStatements".

> **By clicking I agree, I acknowledge receipt of and agree to the disclosures, terms and conditions as presented above. I also acknowledge that I have read and understand MidFirst.com Terms of Use.**

The **Statements and Documents – Service Agreement** is also located in the Administration/Forms and Documents section of the system for future review.

6. The Verify Preferences page is displayed. Click the **Save Preferences** button.

Verify Preferences

You are updating the delivery preference for these account documents. Documents with "paper" delivery will no longer be available for viewing online.

Make preference changes

ABA	Account	Description	Account Type	Document Type	Delivery Preference
303087995	*1434	BUSINESS EBANKING	Checking	Notice	Online

Save preferences   Do not save preferences

To entitle Users to receive eStatements and/or eNotices, the Administrator or Administrative User should complete the following steps:

1. From the **Administration/Company Administration** menu, select **Manage Users**.

2. Select the appropriate User ID to entitle for eStatements or eNotices.

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

To create a new user, click on the button below. You will have an opportunity to copy an existing user during the process.
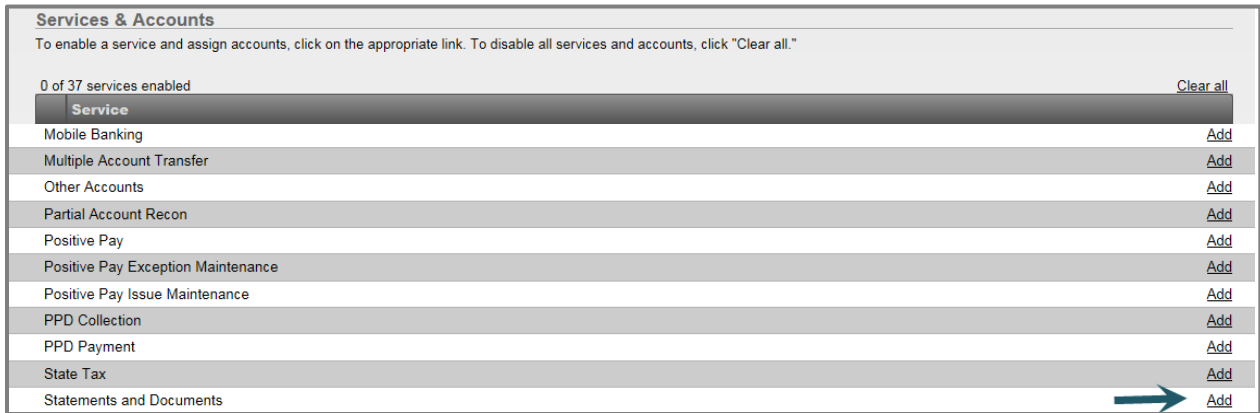
Create new user

Manage Existing Users

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

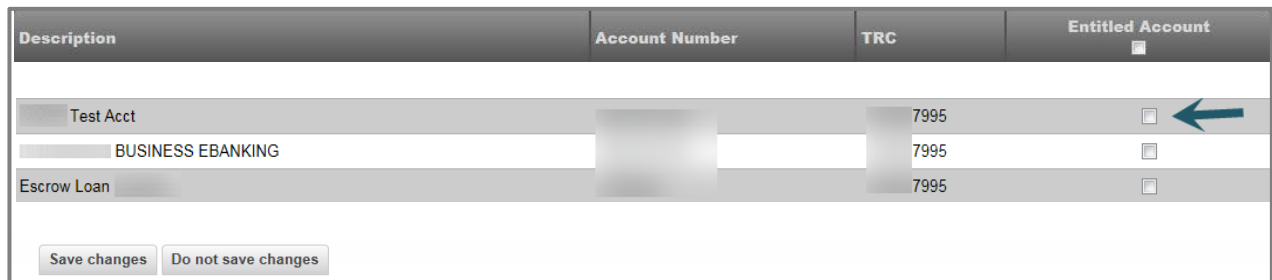| User ID	First Name	Last Name	Status	
11111	Joe	Customer	Active	System access
ADMIN	Admin	Customer	Active	System access

3. The **User Profile** page is displayed. In the **Services & Accounts** area, click the Edit Services & Accounts link.

Services & Accounts	Edit Services & Accounts

4. The **User Profile – Edit Services & Accounts** page is displayed. In the **Services & Accounts** listing, click the Add link associated with **Statements and Documents**.

Services & Accounts

To enable a service and assign accounts, click on the appropriate link. To disable all services and accounts, click "Clear all."

0 of 37 services enabled   Clear all

Service	
Mobile Banking	Add
Multiple Account Transfer	Add
Other Accounts	Add
Partial Account Recon	Add
Positive Pay	Add
Positive Pay Exception Maintenance	Add
Positive Pay Issue Maintenance	Add
PPD Collection	Add
PPD Payment	Add
State Tax	Add
Statements and Documents	Add

5. Check the boxes in the **Entitled Account** column for the appropriate accounts.

Description	Account Number	TRC	Entitled Account ☐
Test Acct		7995	☐
BUSINESS EBANKING		7995	☐
Escrow Loan		7995	☐

Save changes   Do not save changes

6. Click the **Save changes** button to save the account selections.

7. Click the **Save changes** button at the bottom of the page to save all changes made.

8. For assistance with establishing an Alert when a new statement or notice is available, please refer to the **Alert Setup** guide in the Administration/Download Documents section of the system.