

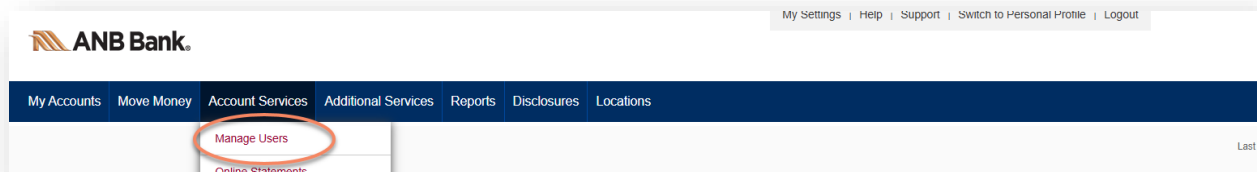
Toggle and Unified Account Summary Set up for Business Profile to Personal Profiles

Primary Admins will need to enable Secondary Admins and Business Users for the new Toggle functionality. This will allow for any enabled Business Admin or Business User to toggle between their business and their personal accounts.

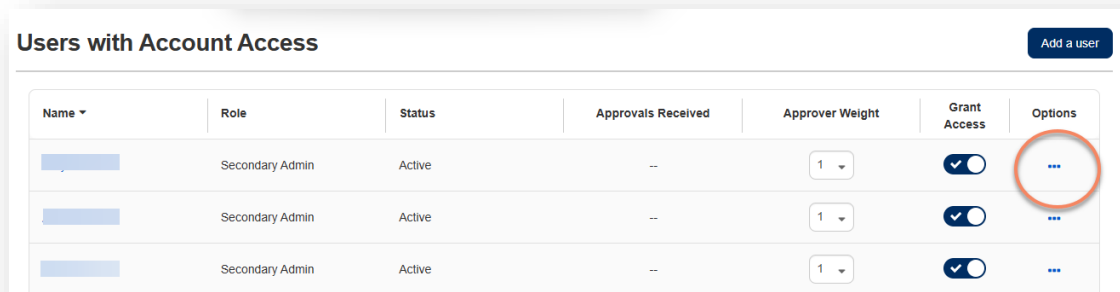
- Any business user can use the toggle function.
- Only that user can set up their toggle to their personal account.
- Admin users will not have access or have any visibility to any business user's personal accounts.
- Users can easily access and switch from their personal or business profiles – no need to log out and log back in. This also works on the mobile app as well.

For Primary Admins

1. Log in to online banking.
2. Select the **Manage Users** link under menu Account Services.



3. Select a user and open the Options (three dots on the right side).



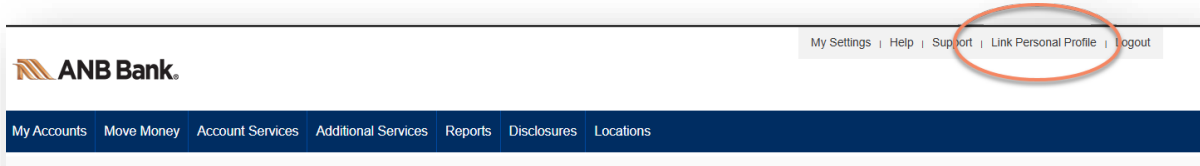
4. Select **Edit User Access**.
5. Under Set access for all accounts, check the following two boxes
 - a. Business/Retail Toggle
 - b. Unified Account Summary
6. Then click **Save**.
7. Depending on your setup, this may need to be approved by a Secondary Admin before the user has access to it.

Set access for all accounts

☒	ACH File Import - Import Recipient Information
☒	ACH File Import - Manage Import File Definitions
☒	Bill Pay
☒	Business Mobile App
☒	Business/Retail Toggle
☒	Invoicing and Payments
☒	Multi-Account Report
☒	Online Statements
☒	Payments Reports
☒	Positive Pay
☒	Single Sign-On - Zelle ⓘ
☒	Unified Account Summary
☒	User Activity Report

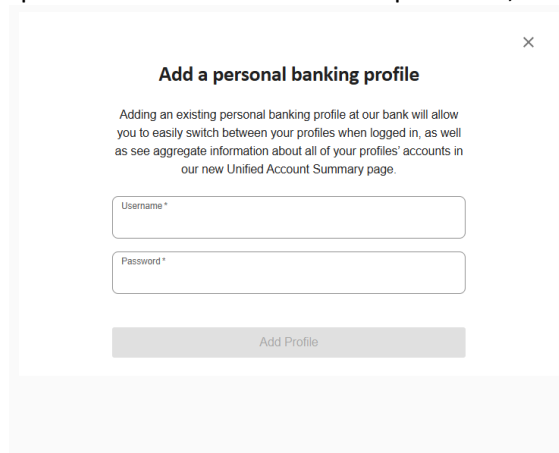
For all Business Users to set up Toggle

1. Log in to online banking.
2. Select the **Link Personal Profile** at the top of the screen. (This entitlement must be granted for this option to show).



The header shows the ANB Bank logo on the left. On the right, there is a navigation bar with links: My Settings, Help, Support, **Link Personal Profile** (circled in red), and Logout. Below this is a dark blue navigation bar with links: My Accounts, Move Money, Account Services, Additional Services, Reports, Disclosures, and Locations.

3. The user will be prompted to enter their User ID and password, then select **Add Profile**.



The form is titled "Add a personal banking profile" and includes a close button (X) in the top right corner. Below the title is explanatory text: "Adding an existing personal banking profile at our bank will allow you to easily switch between your profiles when logged in, as well as see aggregate information about all of your profiles' accounts in our new Unified Account Summary page." The form contains two input fields: "Username*" and "Password*", followed by a grey "Add Profile" button.

4. The user will be prompted to complete their verification.
5. Once successful, the user will have the ability to switch between their personal and business profiles. They can also view their Unified Account Summary page.
6. To make this page their landing page (home page) when logging in, the user will need to toggle the Make Landing Page button at the top. It will turn green with a check when toggled on.

[← Back to Home](#)

Unified Account Summary

**Personal**
Last visit Sep 10, 2026

**Business**
Last visit Sep 10, 2026

Personal accounts \$1,650.00 ⓘ

TIN
EBU TEST 1 ▼

Favorites

☐ Make Landing Page