

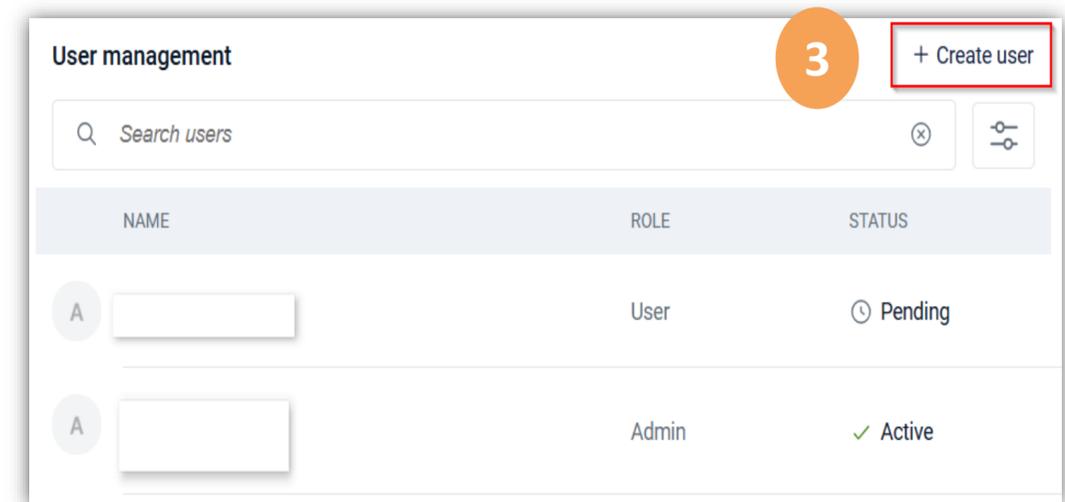
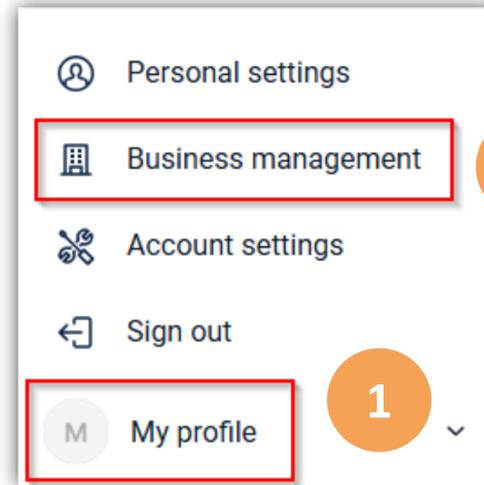
# New User Configuration

## Quick Reference Guide

# Online and Mobile Banking – New User Configuration

## Create a New User

- 1) Click **My profile** at the *bottom left* of your Dashboard.
- 2) Select **Business management**.
- 3) Click + **Create user** at the top right of the User management section.
- 4) Enter new user's **First and Last Name** and **Email Address**.
- 5) Select desired **role** for the new user (*comparison available on next page*).
  - a) **User:** Can move money based on their entitlements and permissions, but they can't use or view the **User management** screen. The role is good for employees who perform day-to-day banking activities.
  - b) **Viewer:** Can view information in the **User management** screen, but they can't edit user entitlements or set permissions.
  - c) **Admin:** Can view or modify entitlements, set permissions, and manage users (create, delete, etc.). They can also edit a user's profile details.
- 6) Click **Create user**.
- 7) Confirm your *own* credentials to continue.



A screenshot of the 'Create user' form. The form has the following fields: 'First name' (containing 'John', with a character count of 4/20), 'Last name' (containing 'User', with a character count of 4/20), 'Email' (containing 'john.user@gmail.com', with a character count of 19/80), and 'User role' (a dropdown menu set to 'User', with an orange circle with the number 5). At the bottom, there is a 'Create user' button (highlighted with a red box and an orange circle with the number 6). A note at the bottom states: 'New users will be created using your organization's default set of permissions. You can edit a user's permissions at any time by going to their user profile.'

# Online and Banking – New User Configuration

## User Roles Comparison

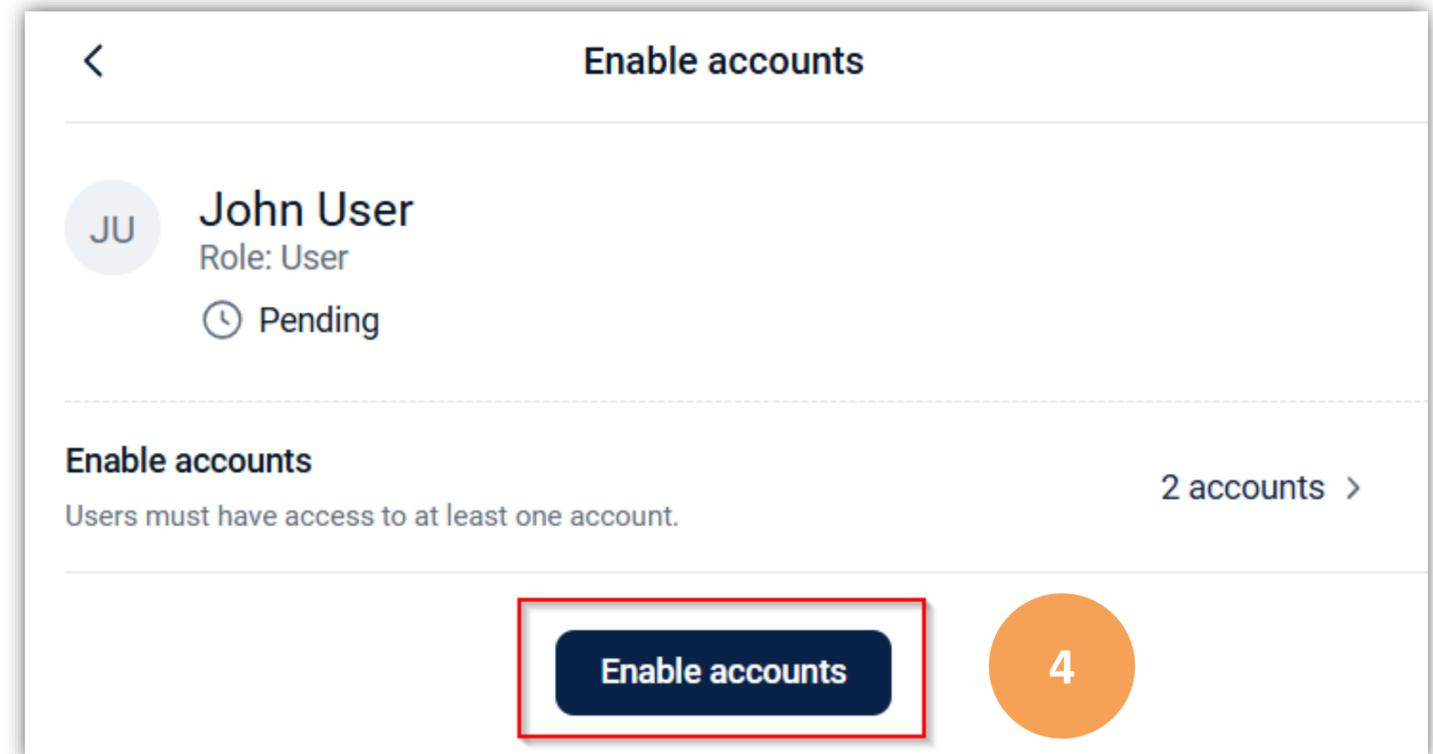
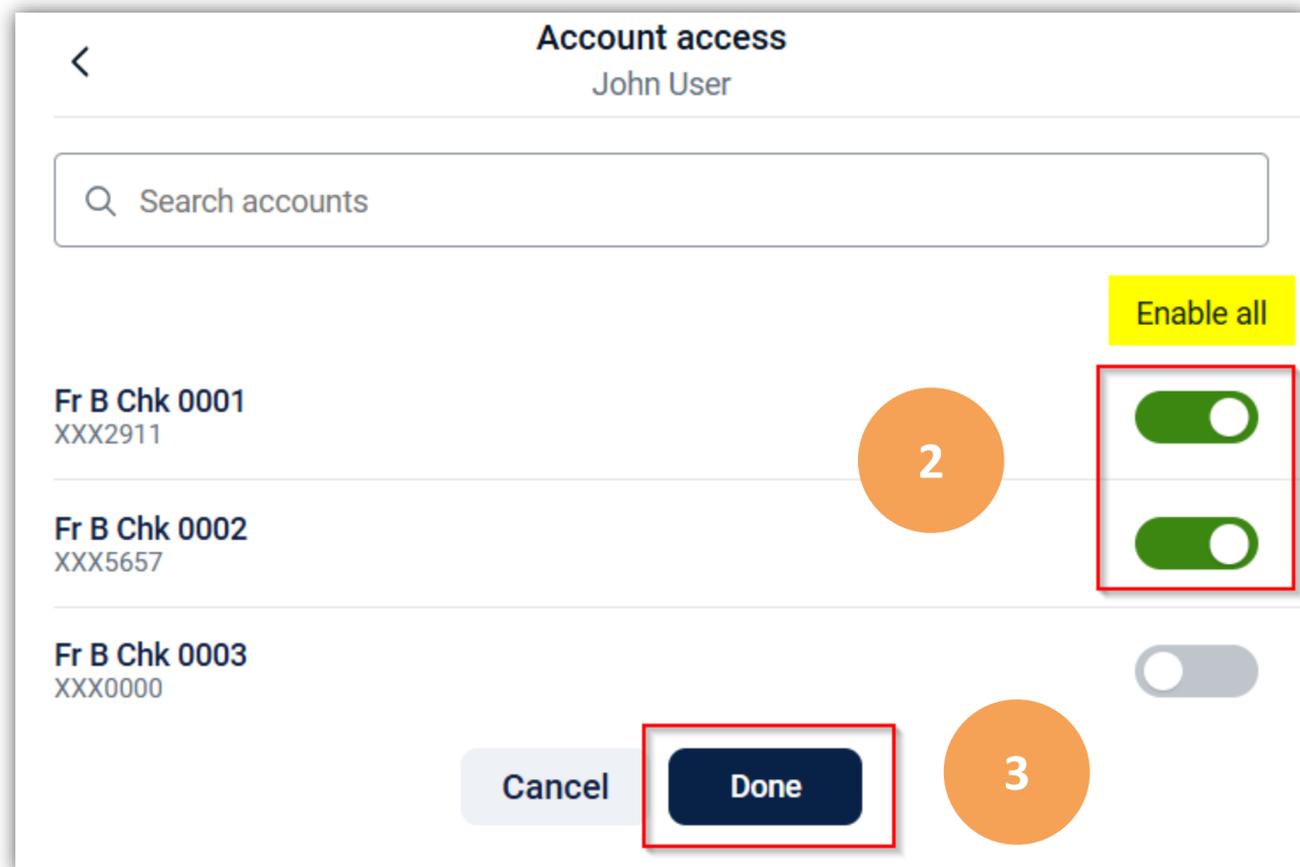
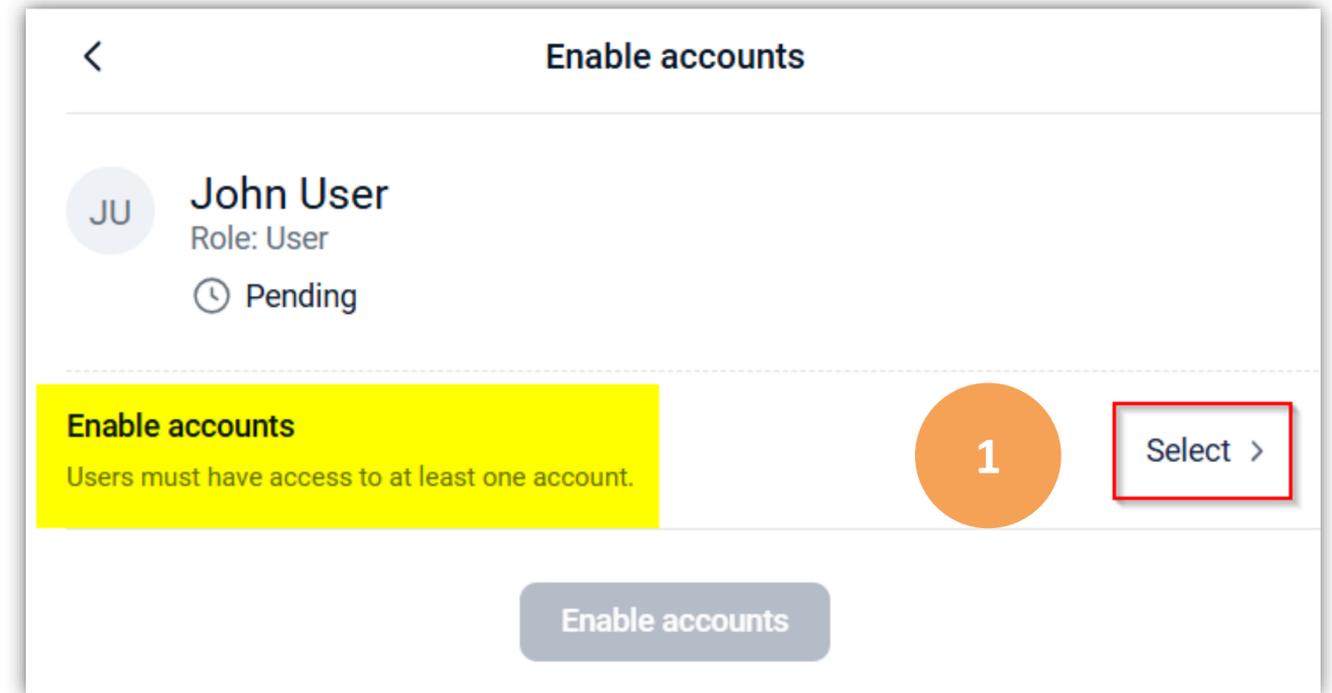
	Admin	Viewer	User
Move funds	Y	Y	Y
View users	Y	Y	
Create users	Y		
Delete users	Y		
Unlock users	Y		
Reset password	Y		
Hold account	Y		
View user profiles	Y	Y	
Edit user profiles	Y		
View user permissions	Y	Y	
Edit user permissions	Y		
View user account permissions	Y	Y	
Edit user account permissions	Y		

# Online and Mobile Banking – New User Configuration

## Enable New User's Account Access

Next, you must determine which account(s) you want the new user to have access to in online banking.

- 1) On the **Enable accounts** screen, click **Select**.
- 2) On the **Account access** screen, select the account(s) that you want the new user to have access to.
  - a) **NOTE:** If you want the new user to have access to *all* accounts, you can click **Enable all**.
- 3) Click **Done**.
- 4) When you return to the **Enable accounts** screen, click **Enable accounts**.



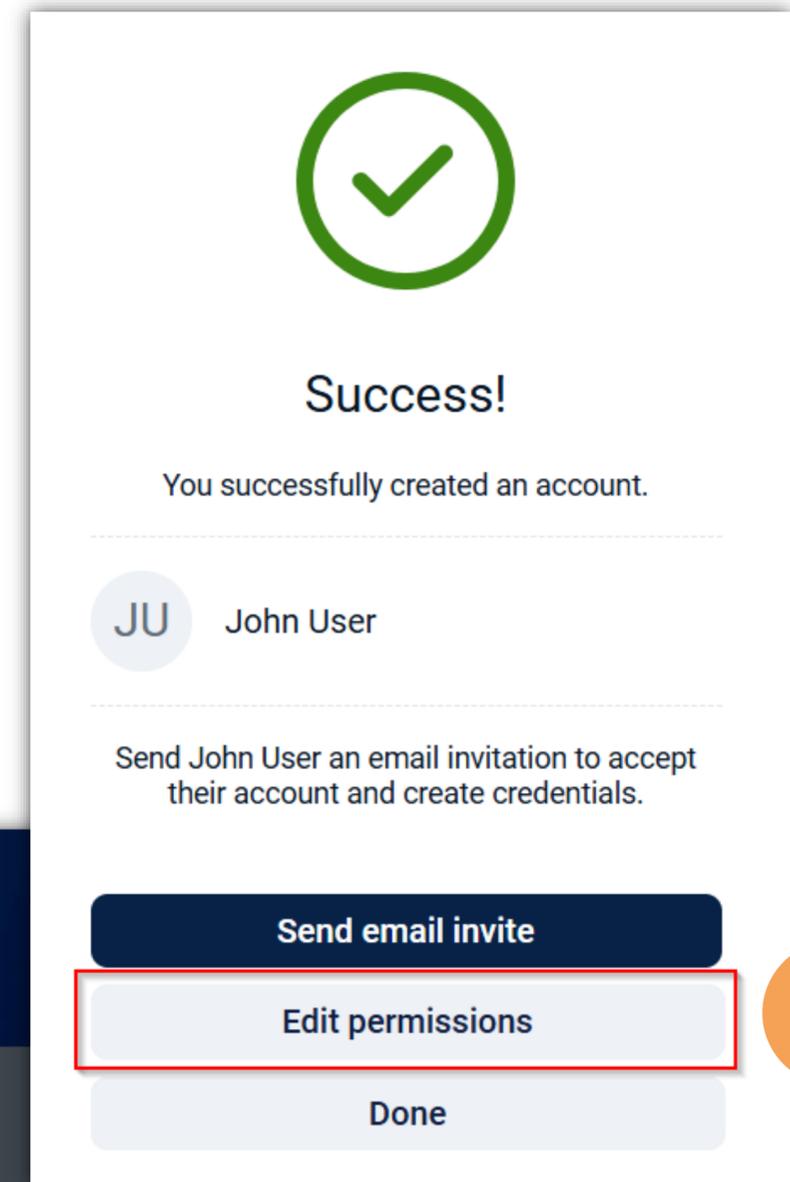
# Online and Mobile Banking – New User Configuration

## Edit New User's Permissions

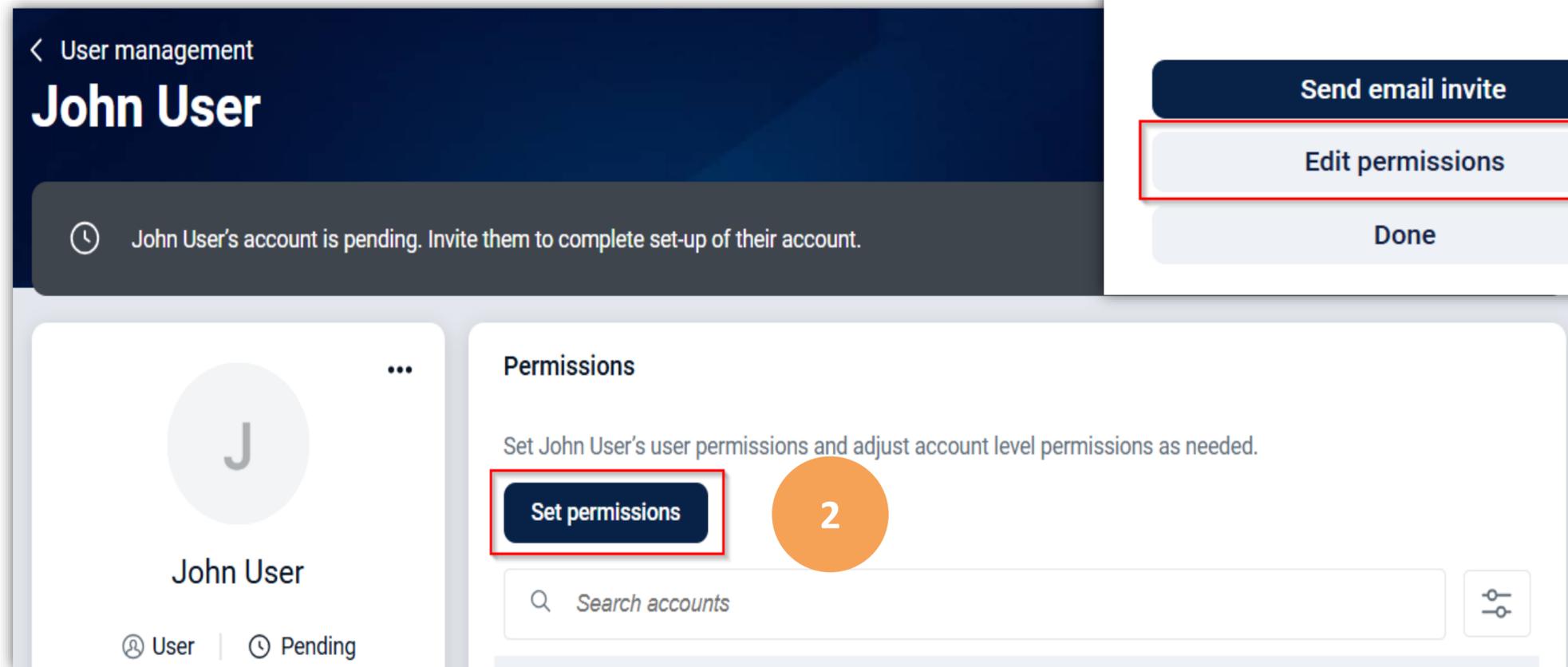
Once you enable the new user's account access, you will see a **Success** screen.

*Before* you send the new user an email invitation, it is recommended to first edit their permissions.

- 1) Click **Edit permissions**.
- 2) On the following **User management** page for the new user, click **Set permissions**.



A success message screen with a green checkmark icon at the top. Below the icon, the text reads "Success!" followed by "You successfully created an account." A horizontal dashed line separates this from the user information section, which shows a circular profile icon with "JU" and the name "John User". Below this, it says "Send John User an email invitation to accept their account and create credentials." At the bottom, there are three buttons: "Send email invite" (dark blue), "Edit permissions" (light blue, highlighted with a red border and an orange circle with the number "1" next to it), and "Done" (light blue).



A user management interface for "John User". The top header is dark blue with a back arrow and "User management" text. Below the header, the name "John User" is displayed in large white font. A dark grey notification bar contains a clock icon and the text "John User's account is pending. Invite them to complete set-up of their account." Below the notification, there is a user profile card on the left with a circular icon containing the letter "J", the name "John User", and status "User | Pending". To the right of the profile card is a "Permissions" section with the heading "Permissions" and the instruction "Set John User's user permissions and adjust account level permissions as needed." A dark blue button labeled "Set permissions" is highlighted with a red border and an orange circle with the number "2" next to it. Below the button is a search bar with the placeholder text "Search accounts" and a settings icon on the right.

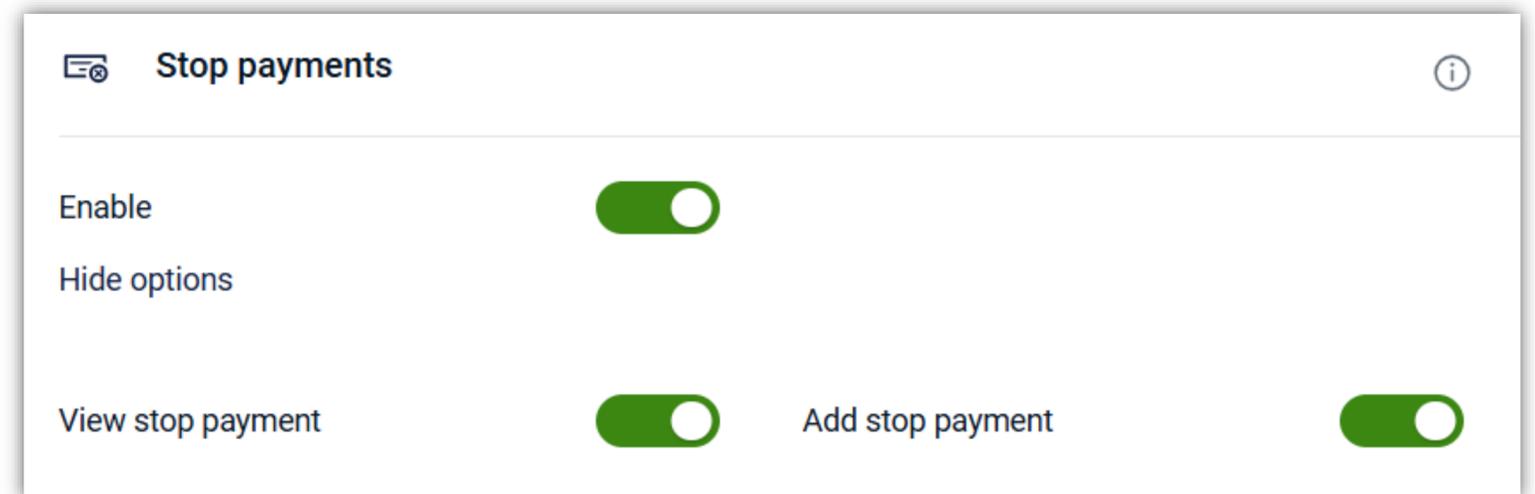
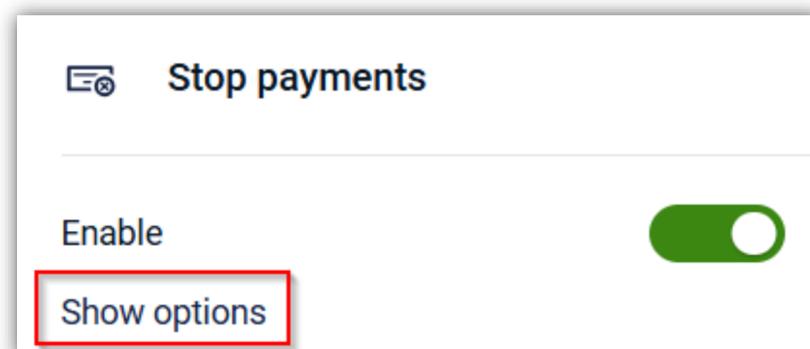
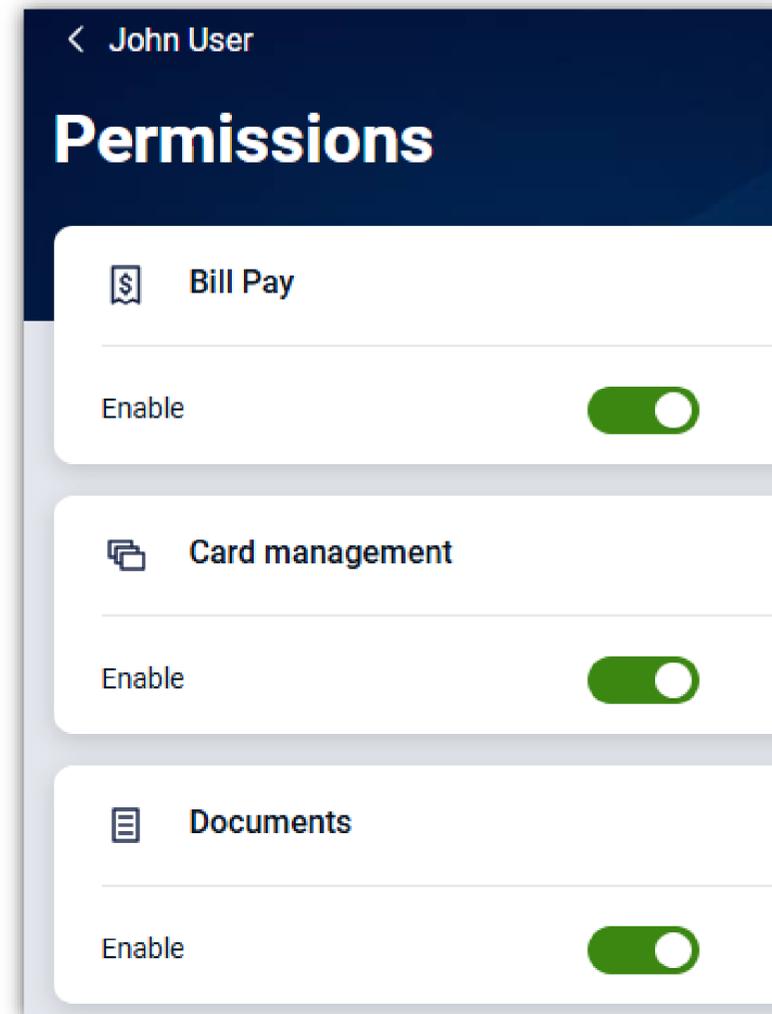


# Online and Mobile Banking – New User Configuration

## Enable New User's Permissions

On the following **Permissions** screen, toggle *on* the **Enable** button for any of the functions that you want the new user to be able to perform.

- **Bill Pay**
- **Card Management**
- **Documents**
- **Stop Payments**
  - Click **Show options**.
  - Specify if you want the new user to be able to **view** and **add** stop payments.

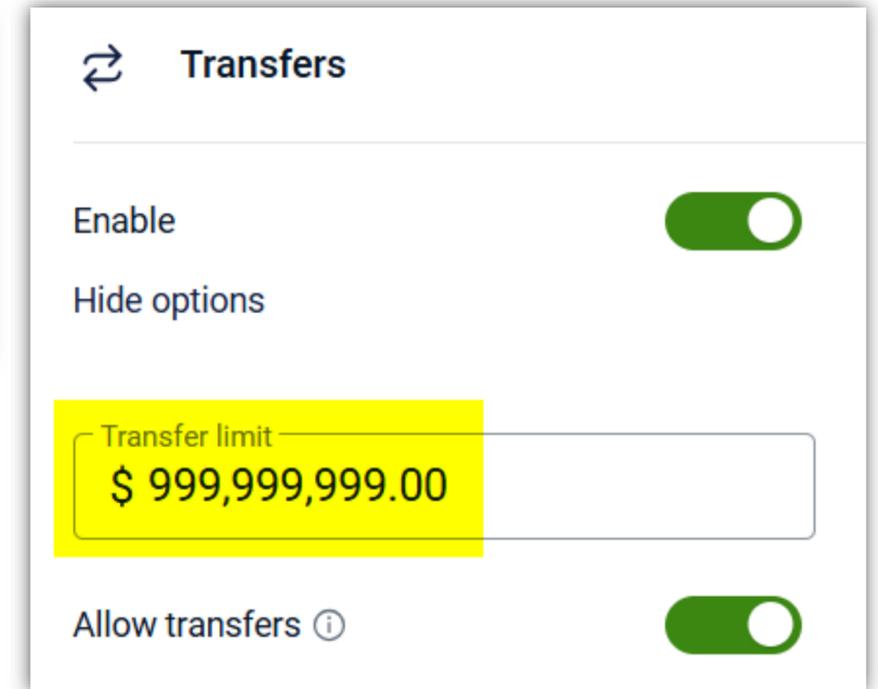
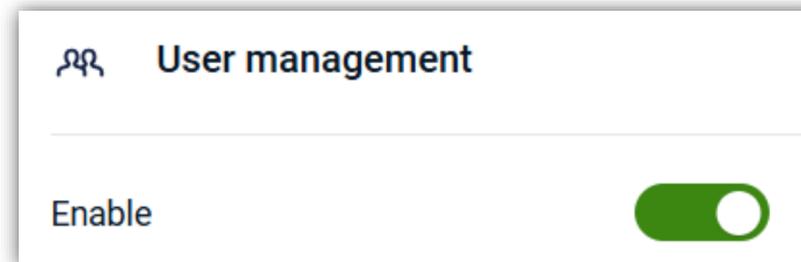
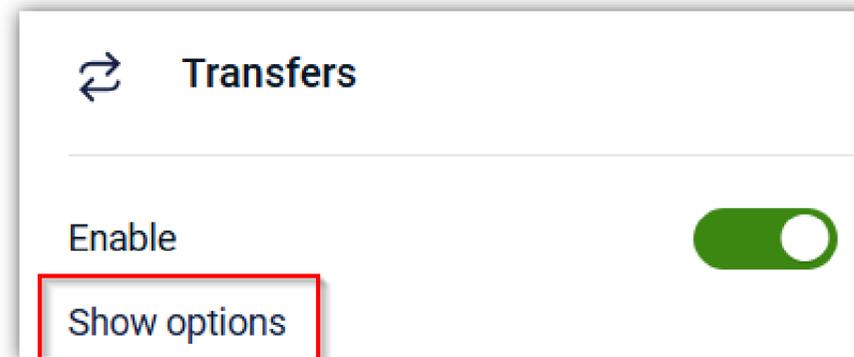


# Online and Mobile Banking – New User Configuration

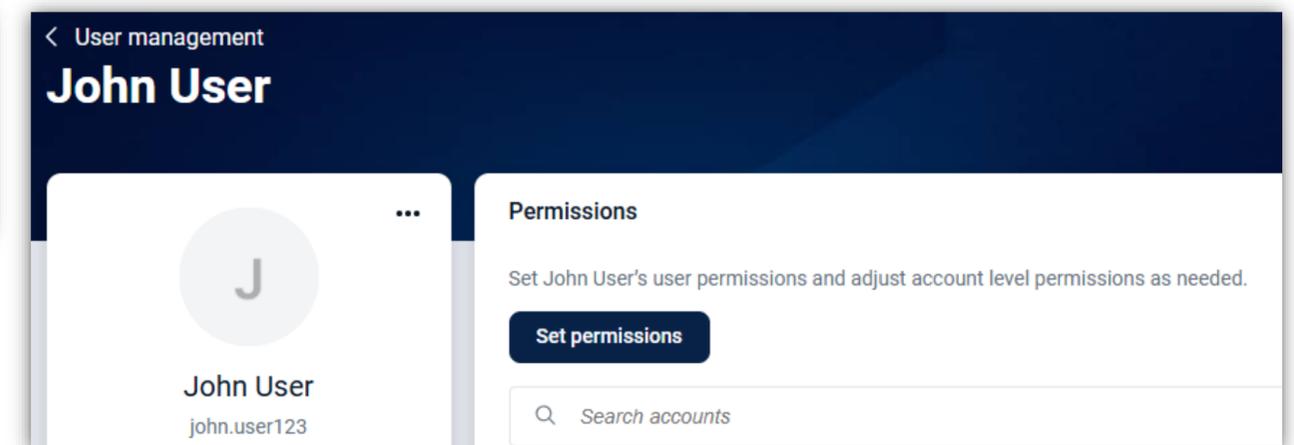
## Enable New User's Permissions (continued)

On the following **Permissions** screen, toggle on the **Enable** button for any of the functions that you want the new user to be able to perform.

- **Transfers**
  - Click **Show options**.
  - **Transfer Limit:** Specify the maximum amount that the new user can send to another person per transfer.
- **User Management**
  - Even if you select **Admin** for a new user's role, you must still enable their **User Management permission** to allow them to make changes to users.



Once you have enabled the applicable permissions for the new user, click the **back arrow** beside the user's name at the top of the page to return to the new user's **User management** page.



# Online and Mobile Banking – New User Configuration

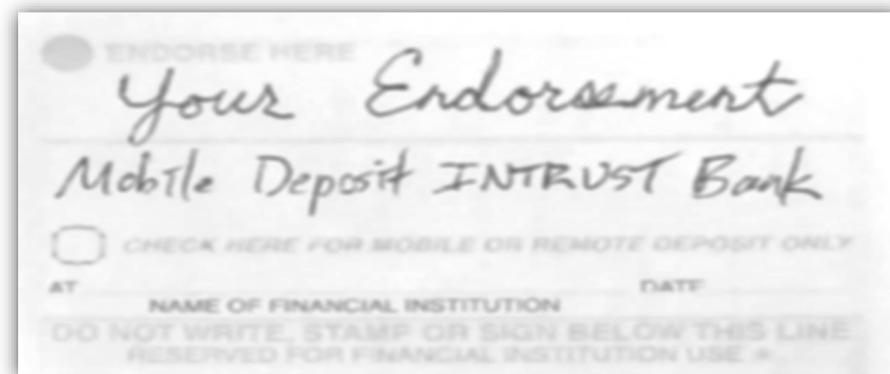
## Enable Additional Services for the New User

From the new user's **User management** page, you can toggle on any **Additional Services** that you want the new user to have access to.

- **Credit Card:** View link to a credit card management site.
- **Documents:** View advanced settings link for Documents
  - **NOTE:** The new user must have an *Admin* role to manage advanced settings.
- **Manage Payments:** View link to advanced Bill Pay settings.
  - **NOTE:** The new user must have the Bill Pay **permission** enabled.

### Mobile Check Deposit Considerations:

- Admins do *not* need to enable a specific permission for users to have access to **Mobile Check Deposit**. All users will have access to this service by default.
- When users want to deposit a check payable to your business via Mobile Check Deposit, they should endorse the check like normal. Then, add the phrase, "**Mobile Deposit INTRUST Bank.**"



# Online and Mobile Banking – New User Configuration

## Send Invite to the New User

Once you have enabled the new user's applicable account access, permissions and additional services, you will return to the new user's **User management** page.

- 1) In the gray banner below the user's name, click **Invite**.
- 2) The new user will receive an **Organization User Invitation** email from *INTRUST@intrustbank.com* that prompts the new user to join your organization's online banking profile.
- 3) The new user will click **Join** in their email. Then, they will create their own unique username and password and set up a Multifactor Authentication (MFA) method to successfully log into your organization's online banking profile for the first time.
- 4) The next time that you view the new user's **User management** page, you can see that their **status** has changed from *Pending* to *Active*.

