New User Configuration

Quick Reference Guide

Create a New User

1) Click **My profile** at the *bottom left* of your Dashboard.

2) Select **Business management**.

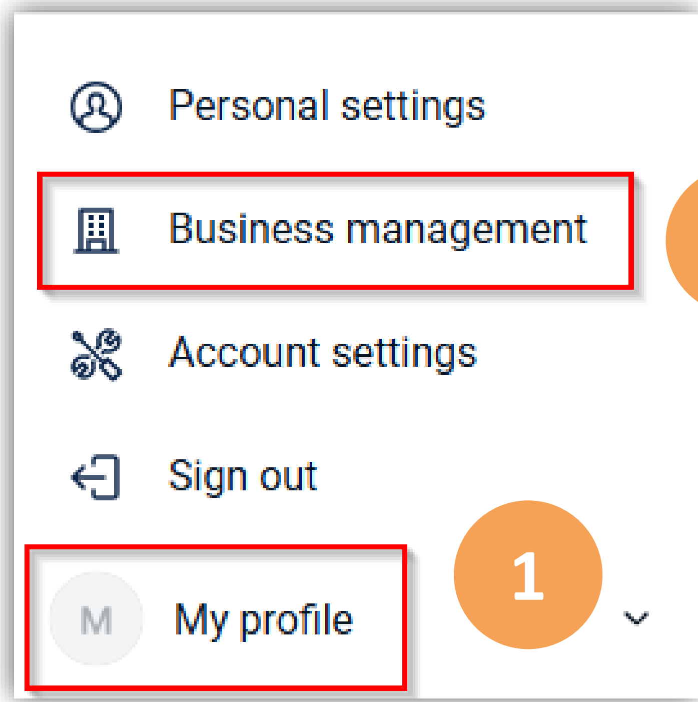
3) Click **+ Create user** at the top right of the User management section.

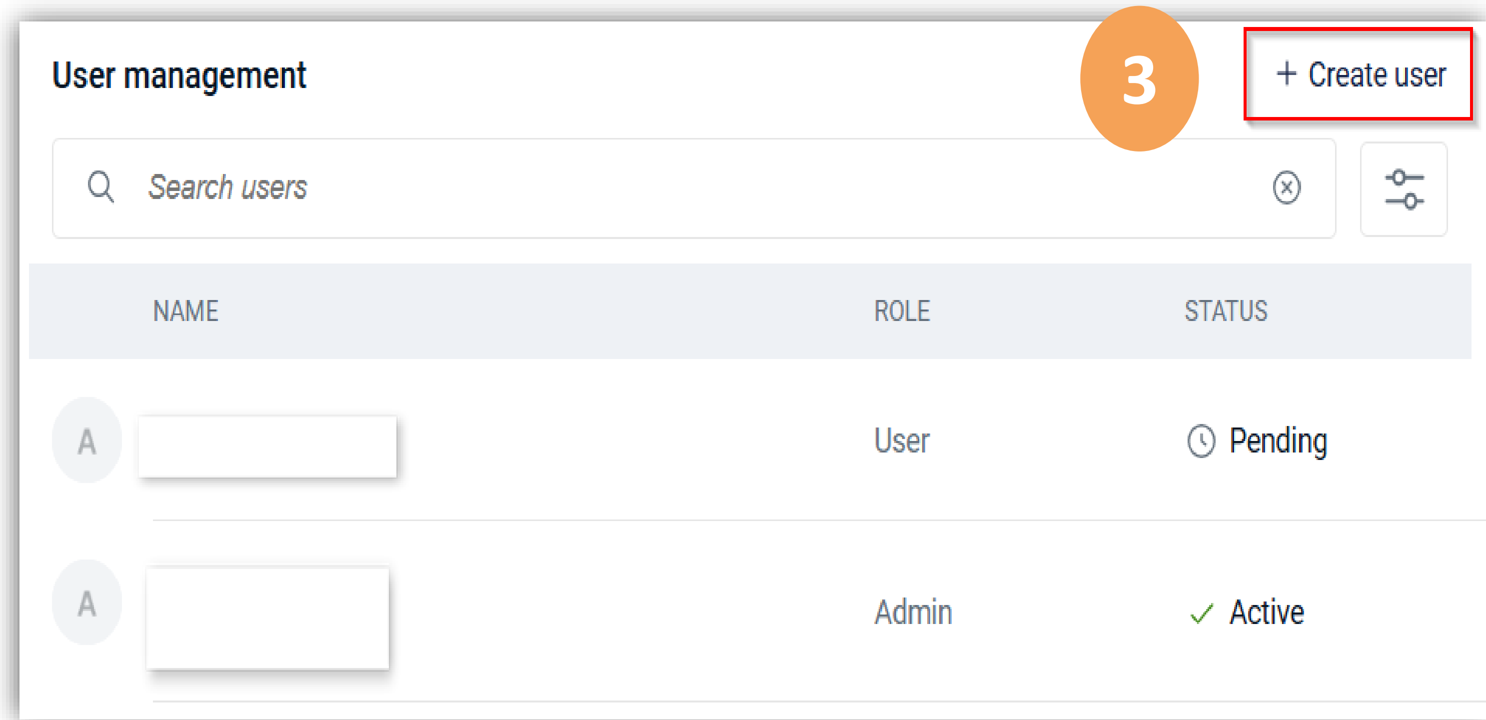
4) Enter new user's **First and Last Name** and **Email Address.**

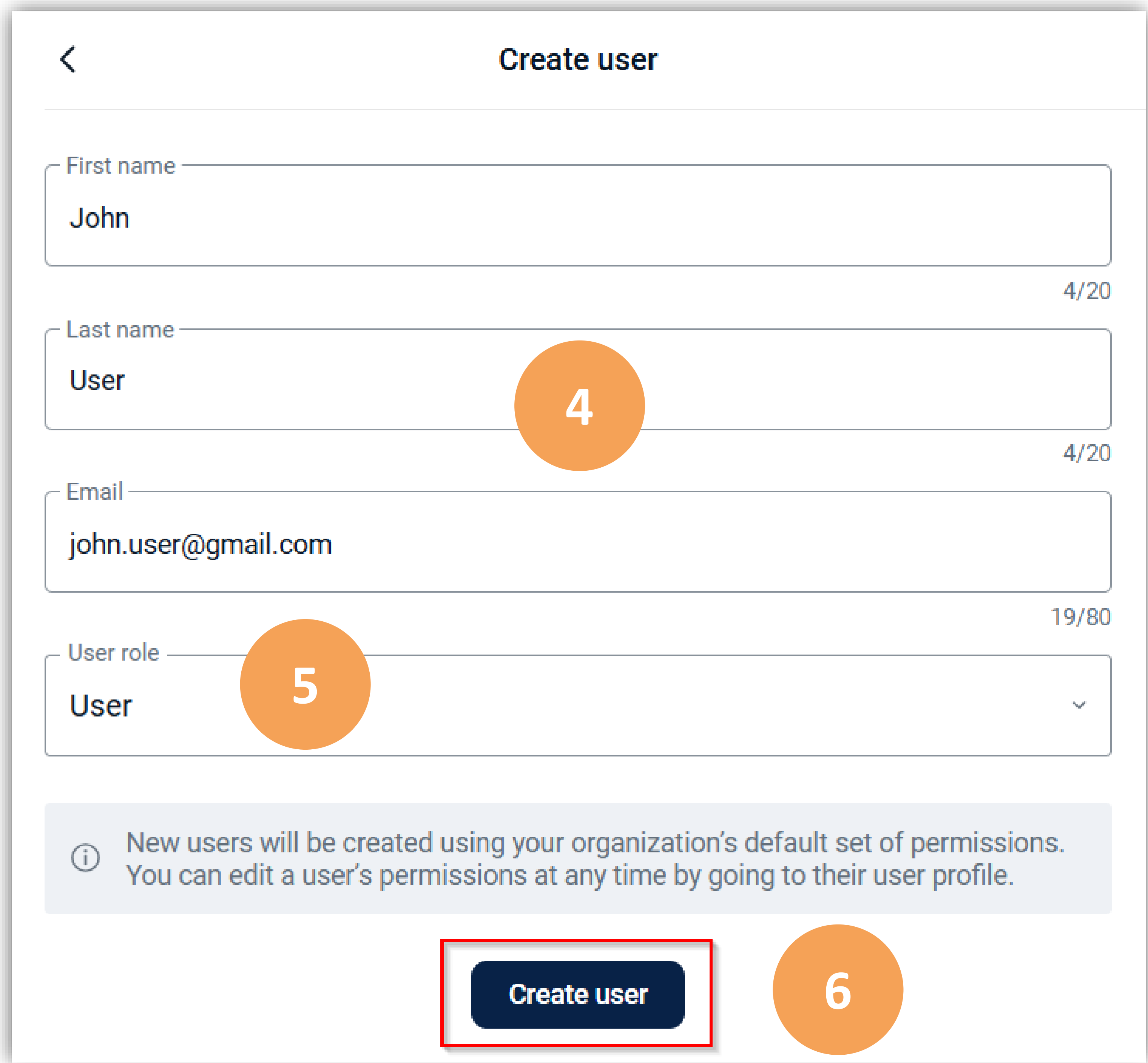
5) Select desired **role** for the new user (*comparison available on next page*).
   - **a) User:** Can move money based on their entitlements and permissions, but they can't use or view the **User management** screen. The role is good for employees who perform day-to-day banking activities.
   - **b) 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.







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		

Enable New User's Account Access

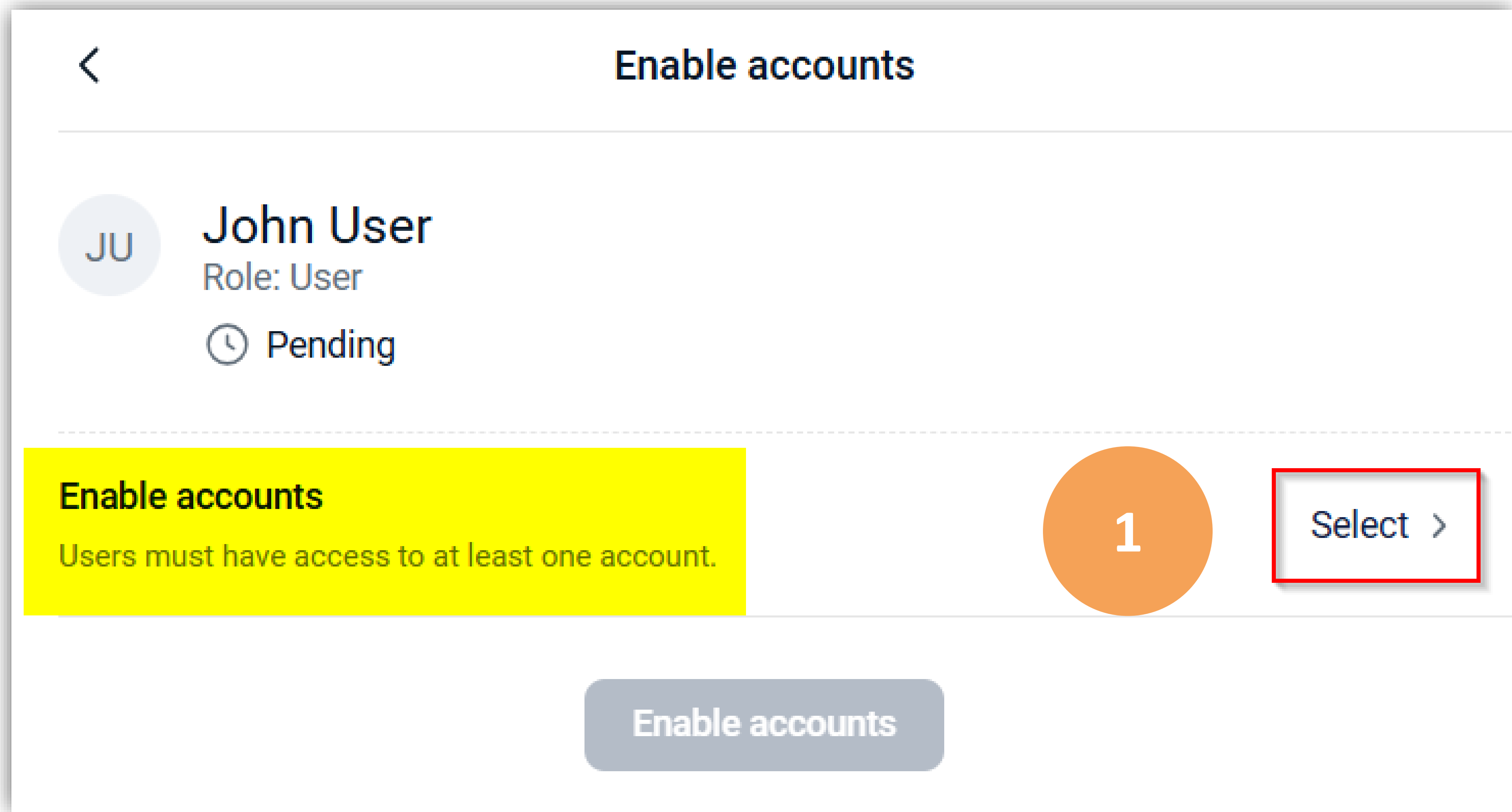
Next, you must determine which account(s) you want the new user to have access to in online banking.

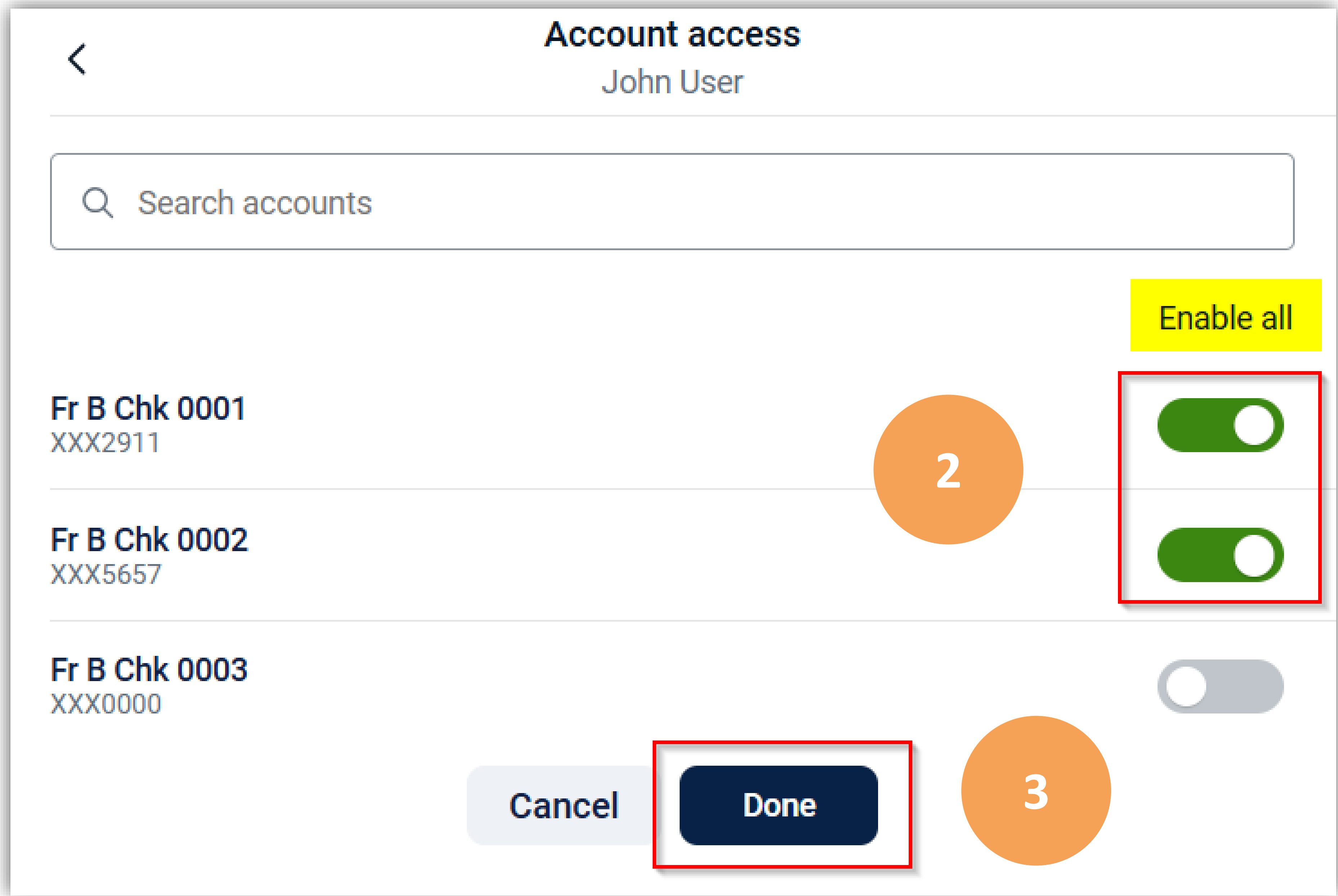
1) On the **Enable accounts** screen, click **Select**.

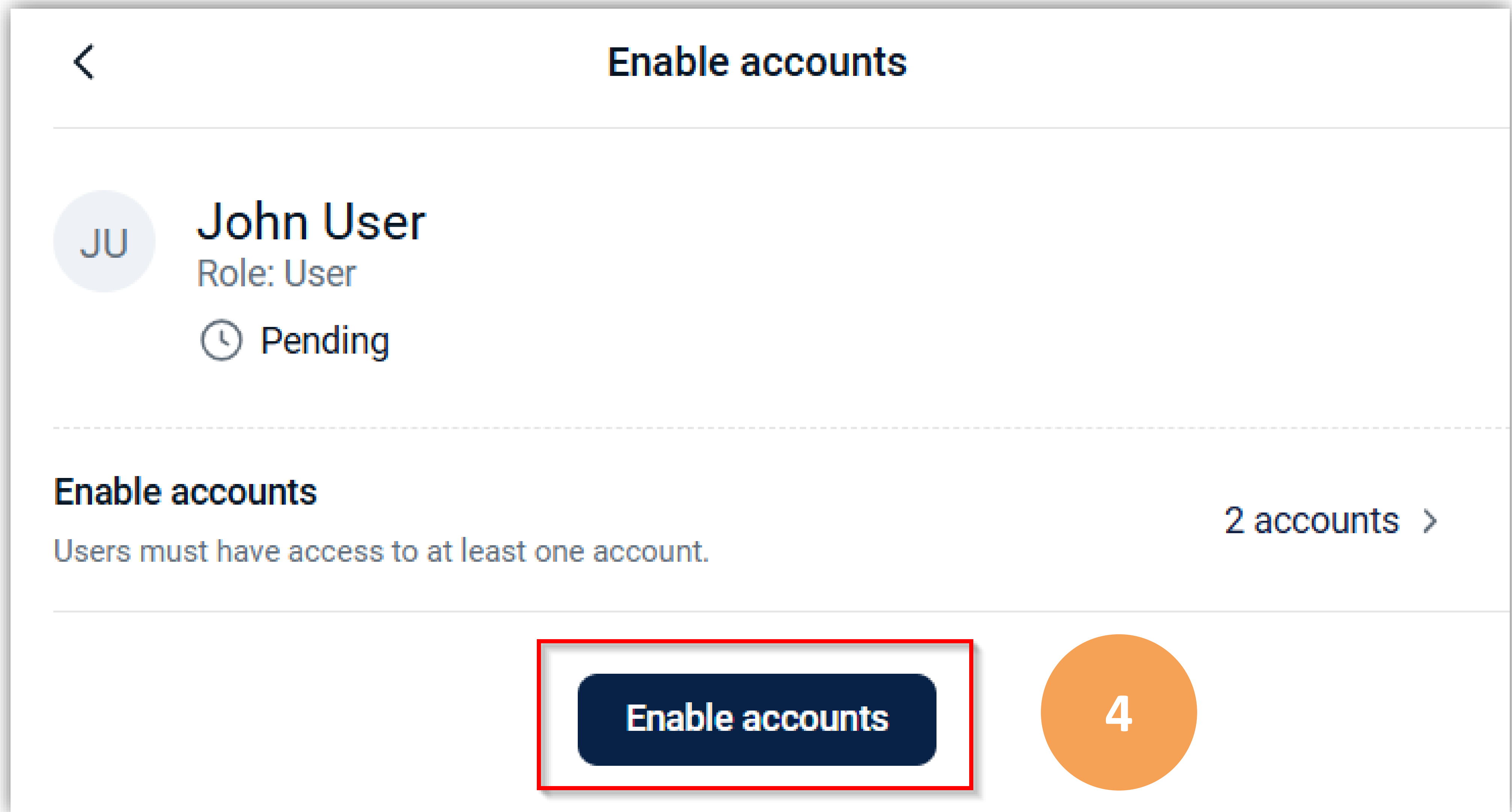
2) On the **Account access** screen, select the account(s) that you want the new user to have access to.
   a) **NOTE:** If you want the new user to have access to *all* accounts, you can click **Enable all**.

3) Click **Done**.

4) When you return to the **Enable accounts** screen, click **Enable accounts**.







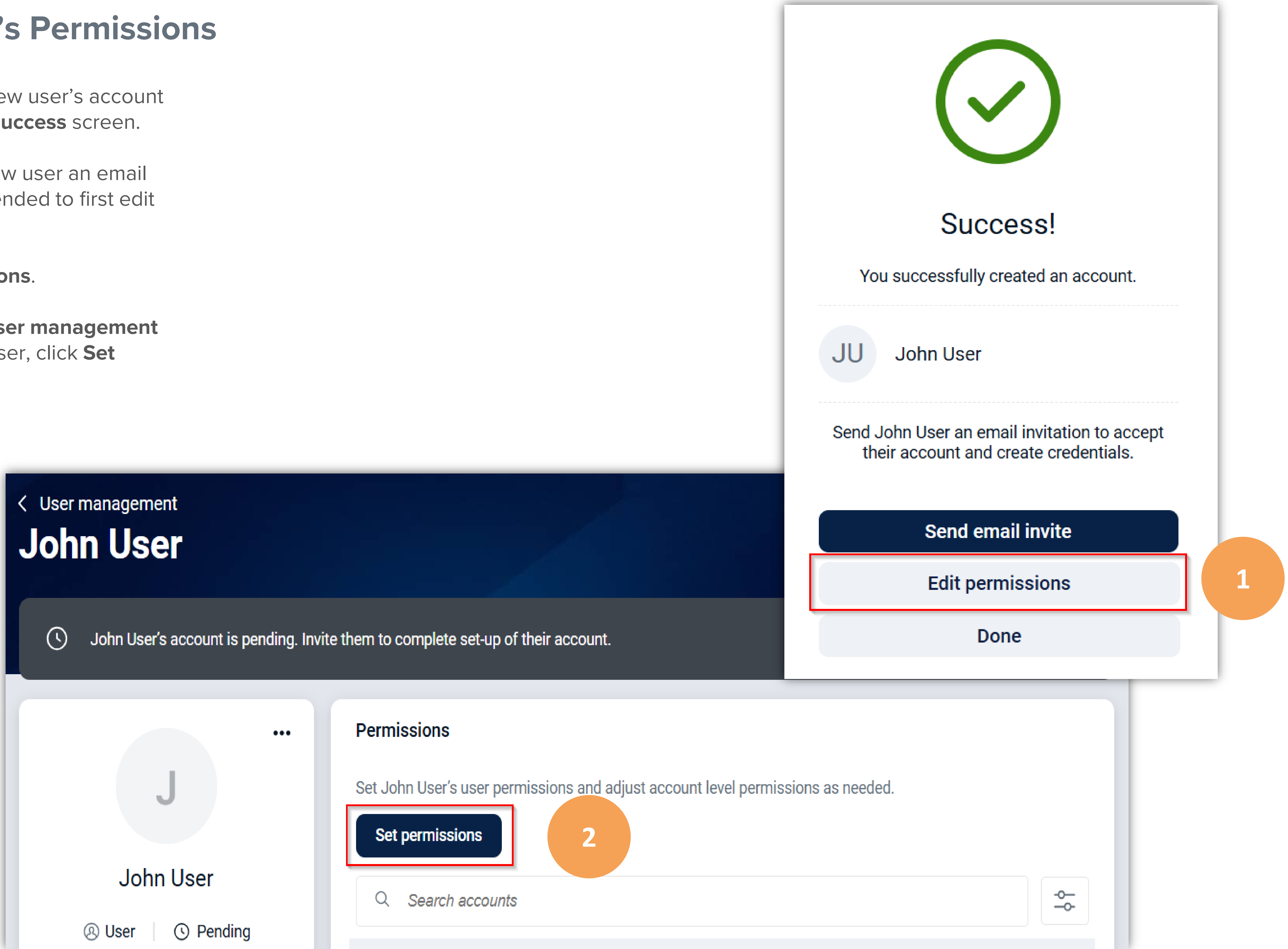
Edit New User’s Permissions

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**.

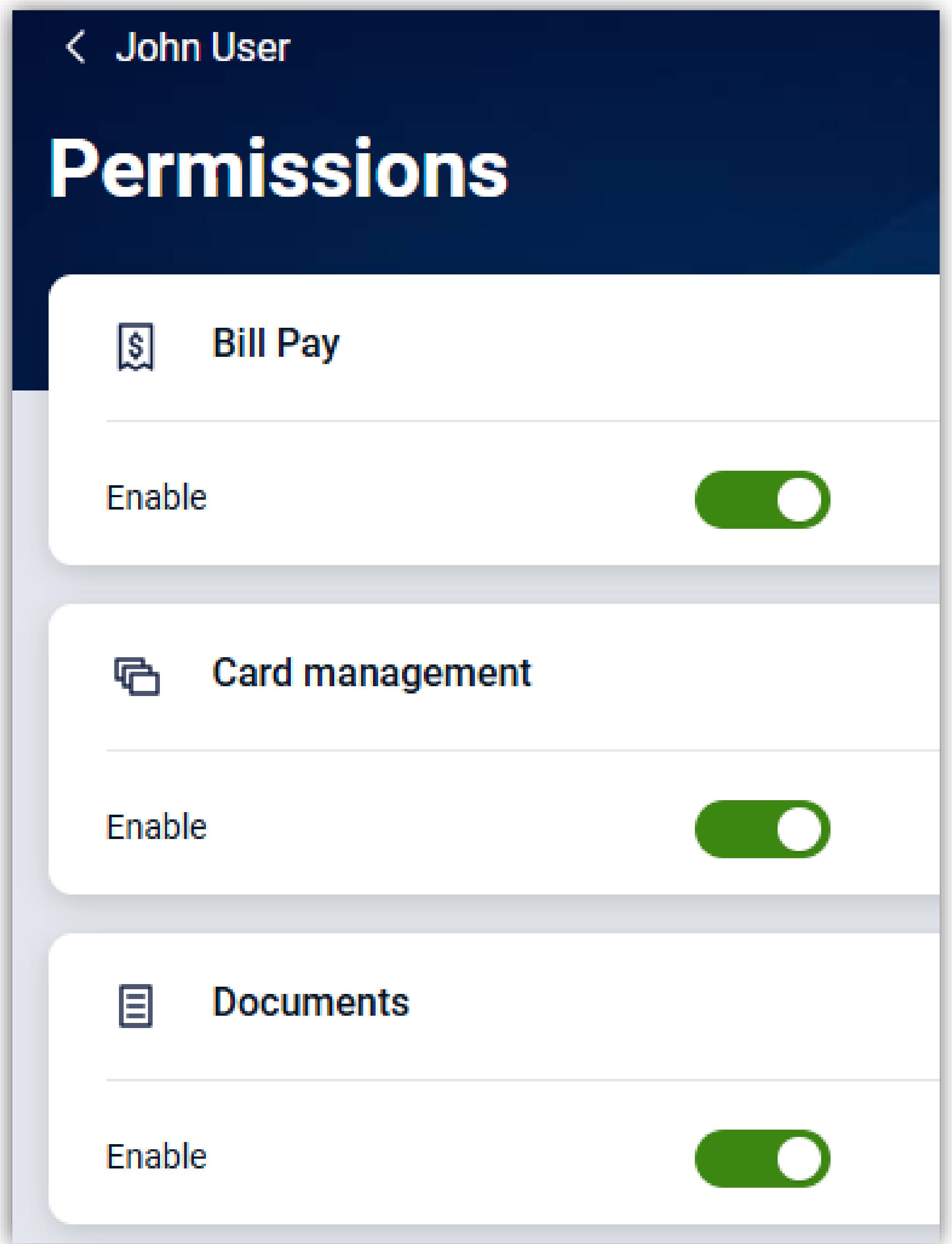
2) On the following **User management** page for the new user, click **Set permissions**.

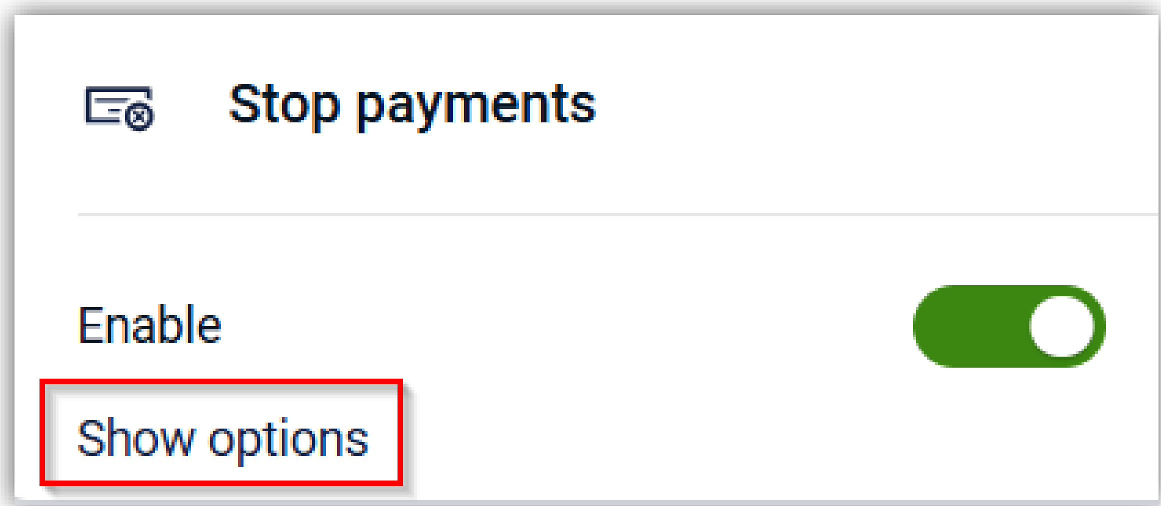


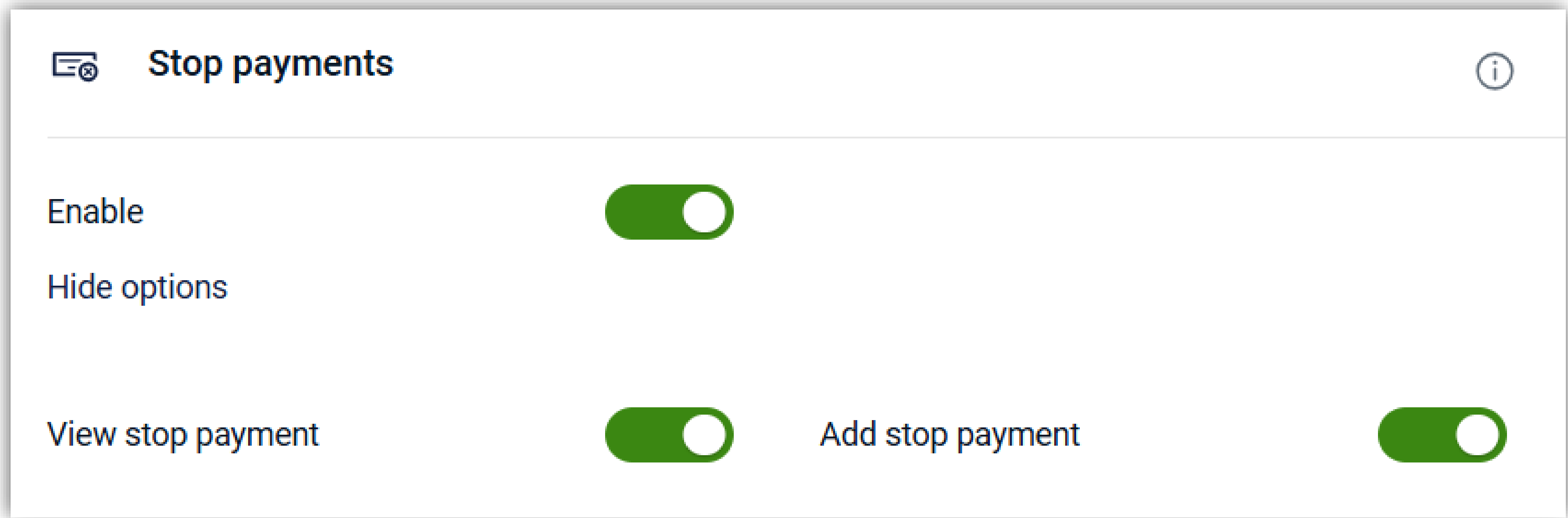
Enable New User's Permissions

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.



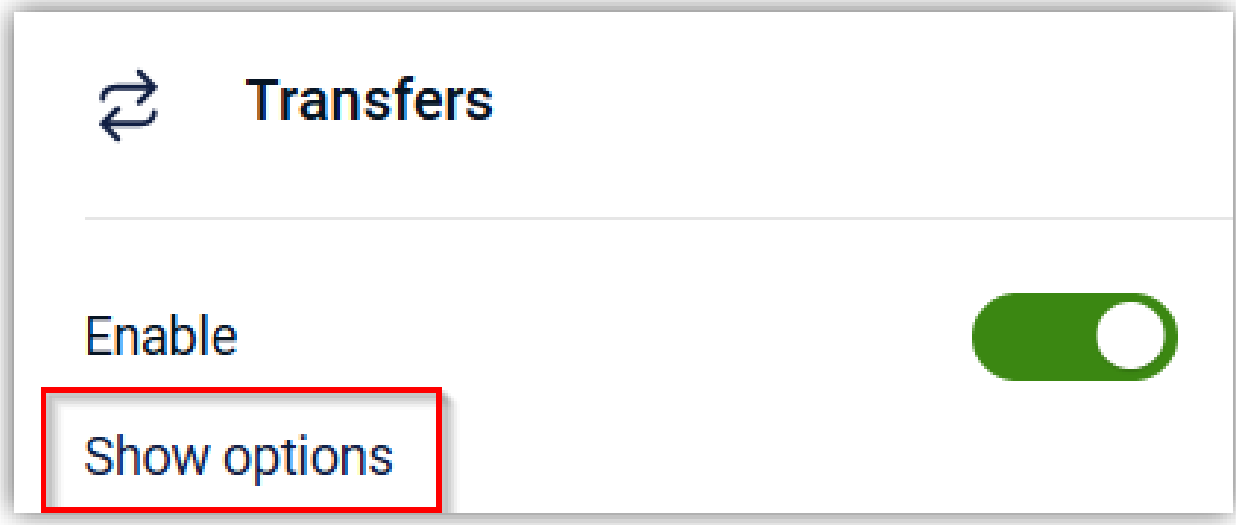


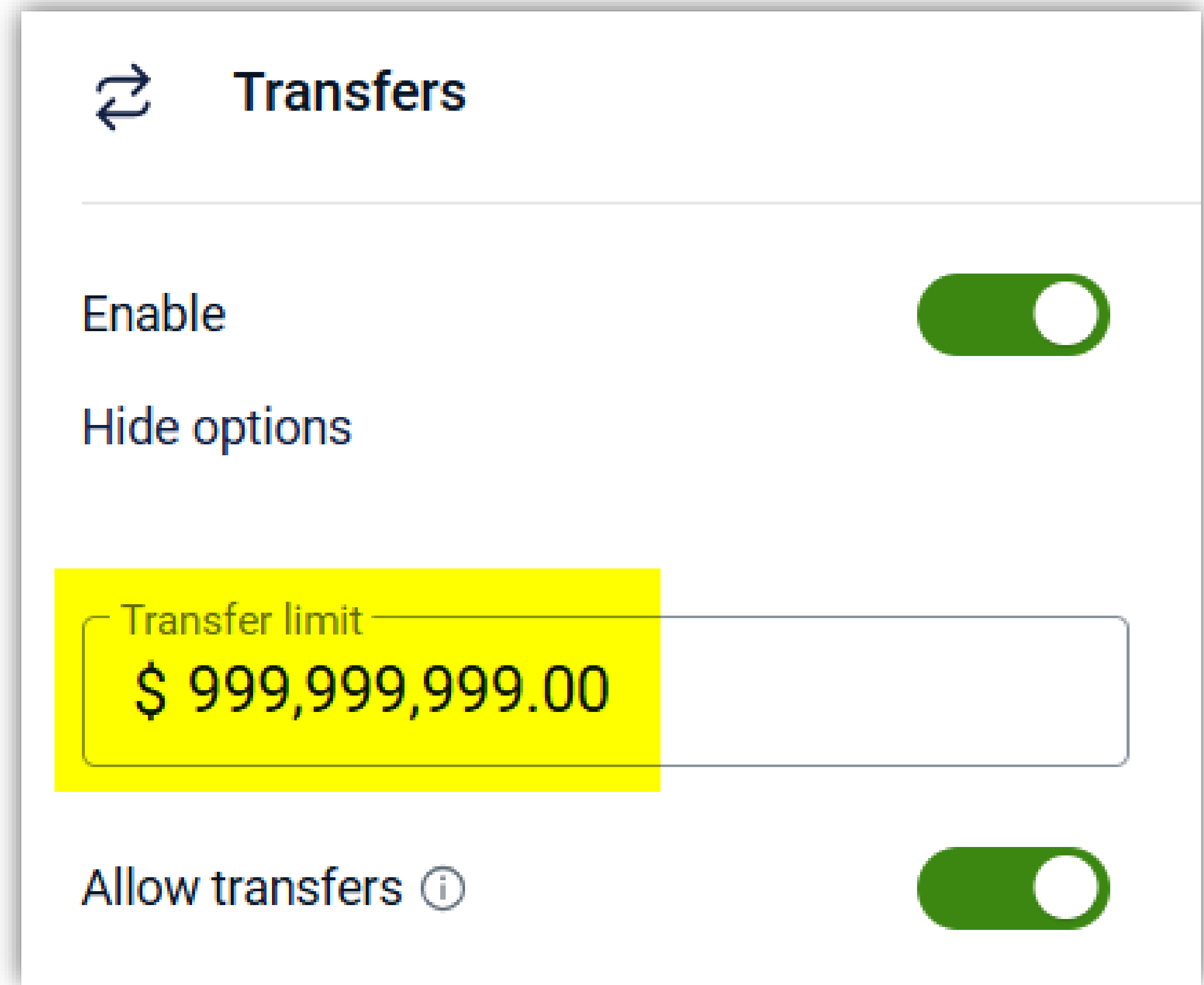


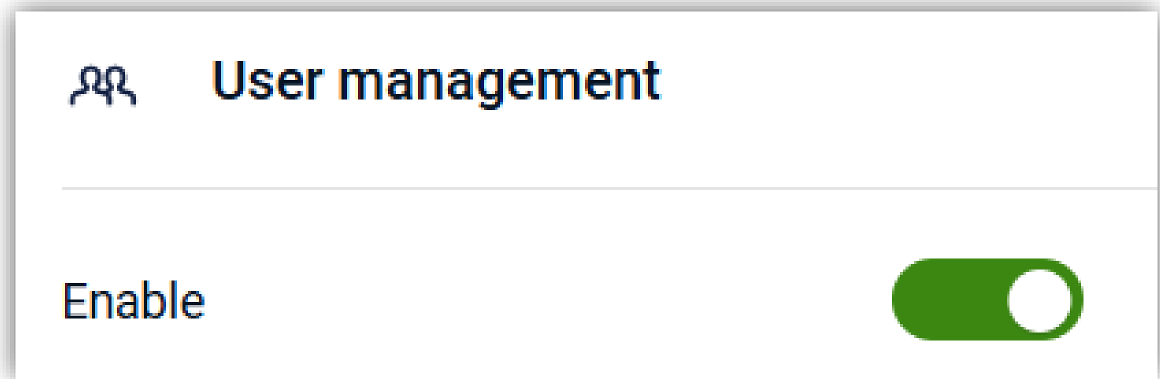
Enable New User's Permissions (*continued*)

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.

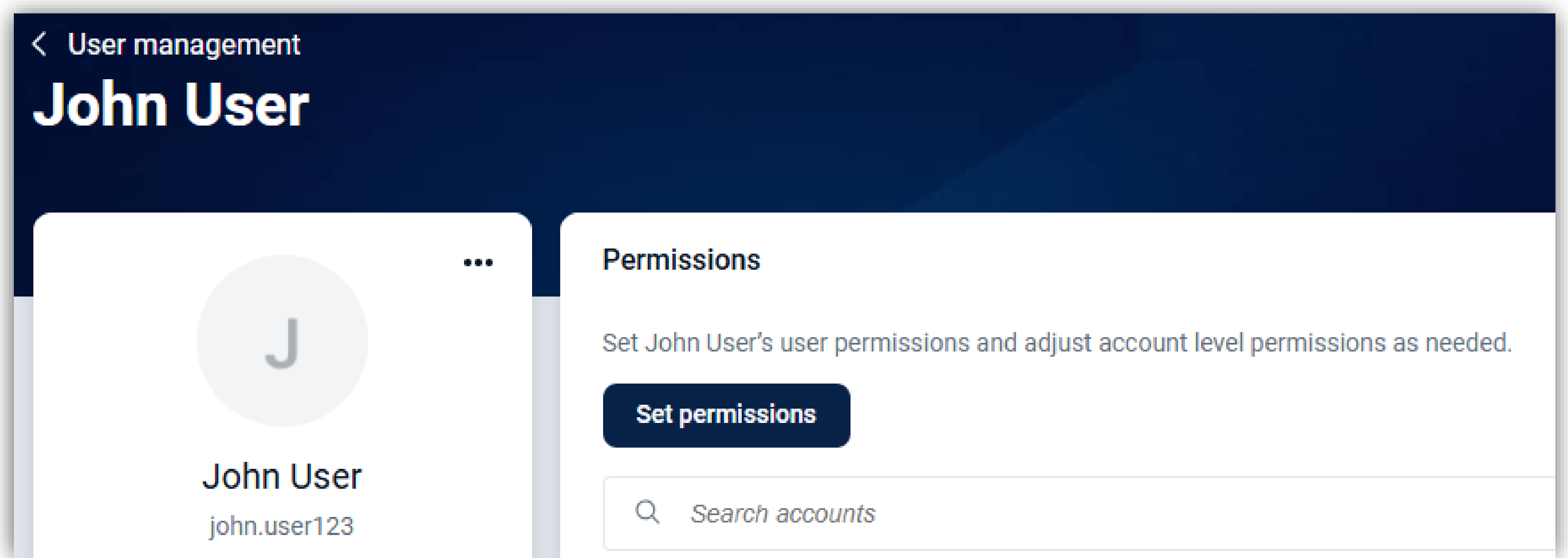
- **Transfers**
  - Click **Show options**.
  - **Transfer Limit:** Specify the maximum amount that the new user can send to another person per transfer.
- **User Management**
  - Even if you select **Admin** for a new user's *role*, you must still enable their **User Management** *permission* to allow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







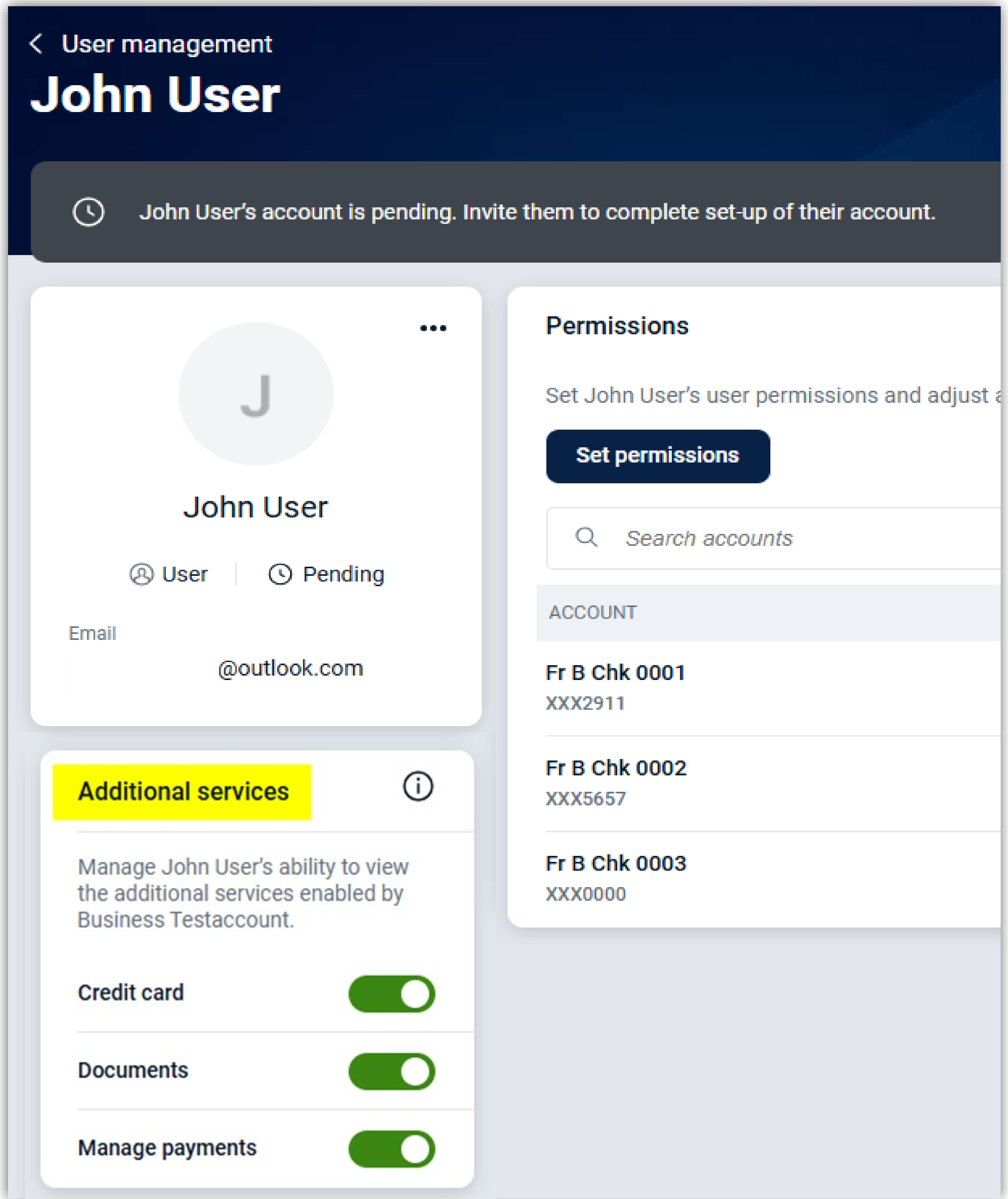
Once you have enabled the applicable permissions for the new user, click the **back arrow** beside the user's name at the top of the page to return to the new user's **User management** page.



Enable Additional Services for the New User

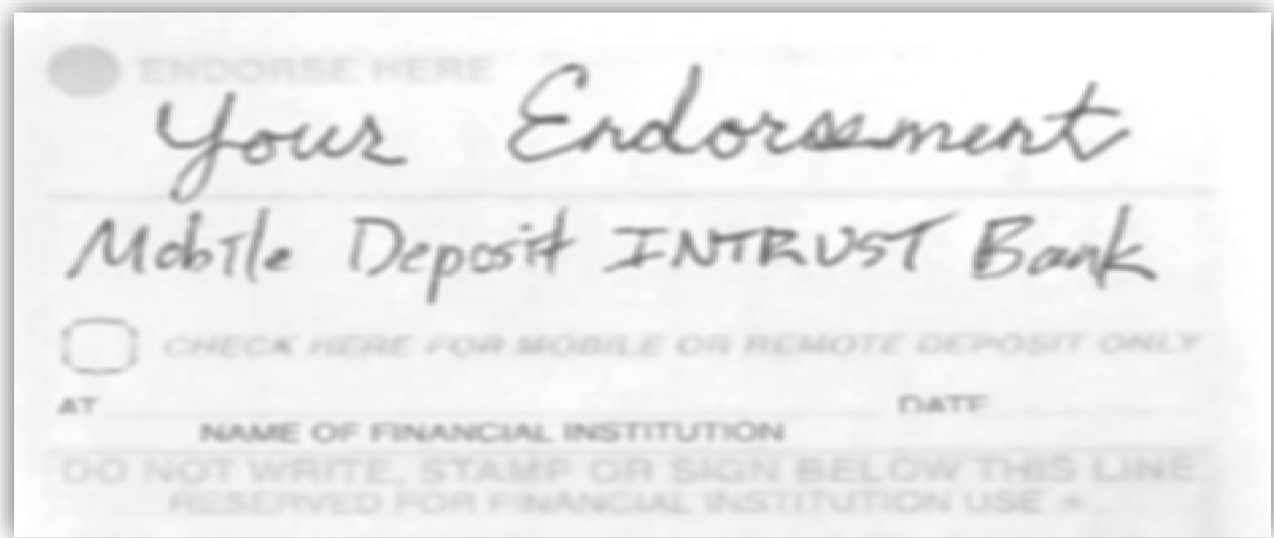
From the new user's **User management** page, you can toggle on any **Additional Services** that you want the new user to have access to.

- **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**."



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*.