

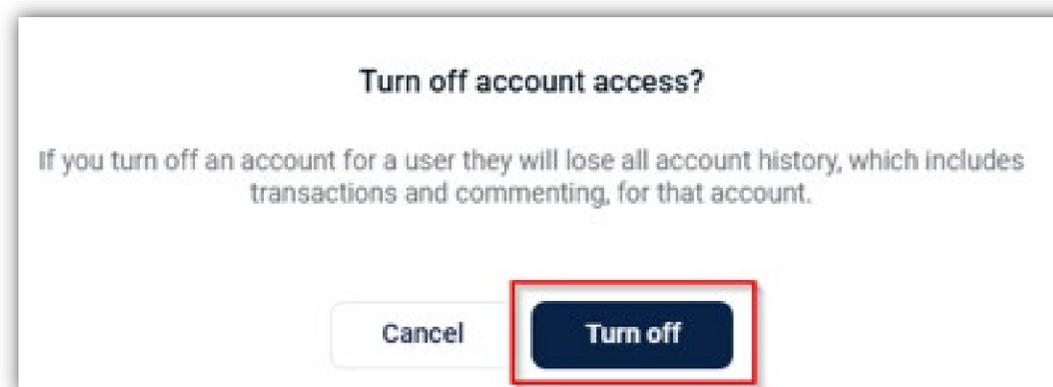
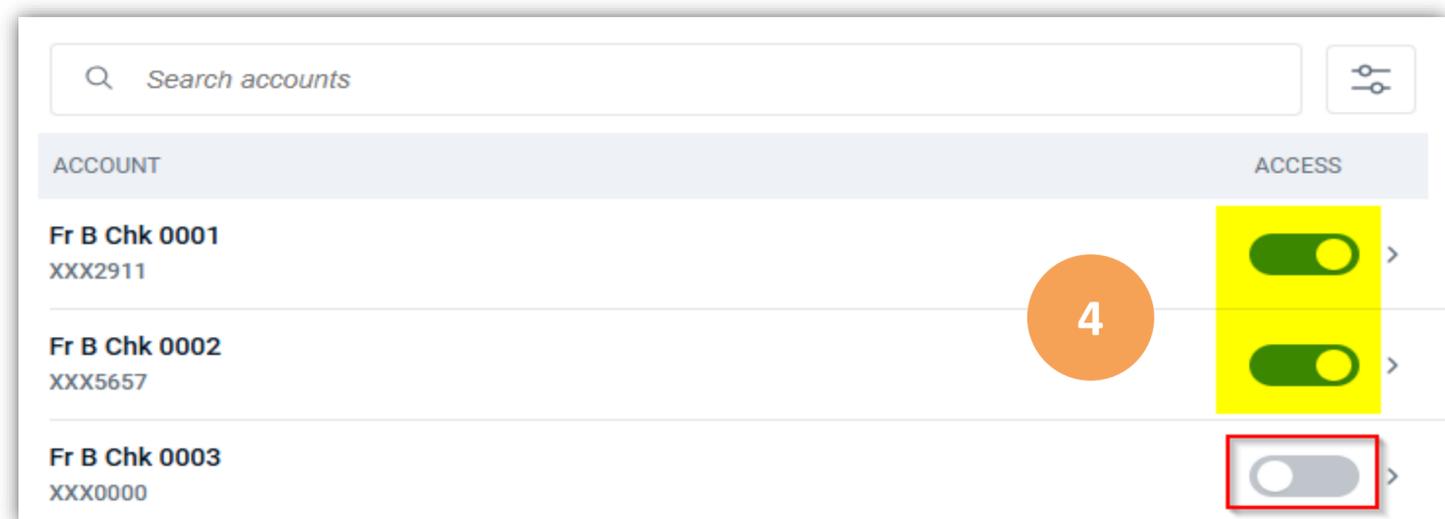
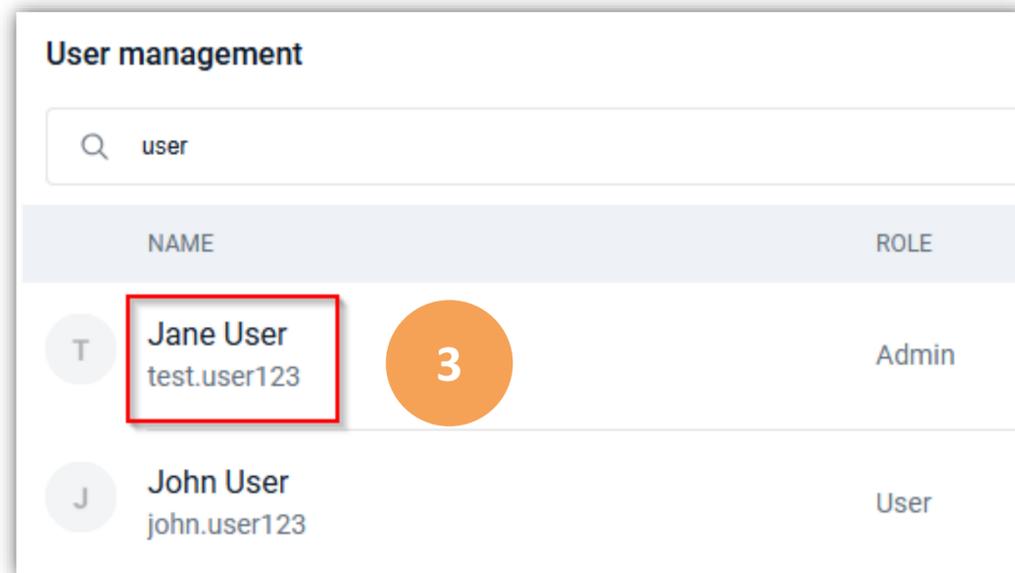
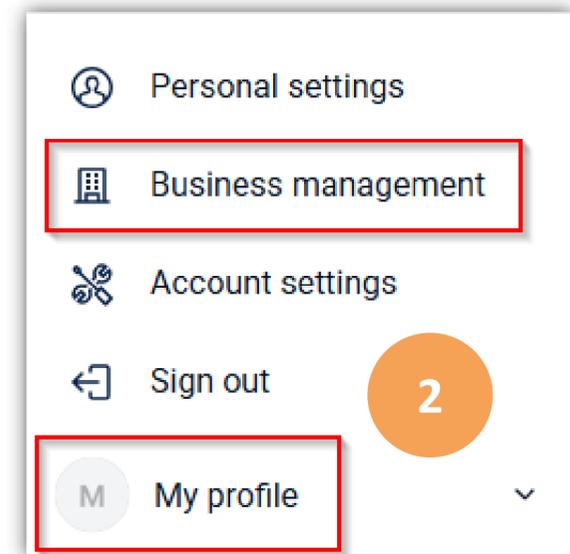
# User Administration

## Quick Reference Guide

# Online and Mobile Banking – User Administration

## Edit a User's Access to Specific Accounts

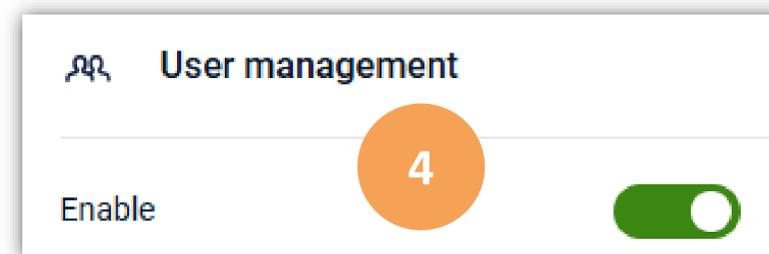
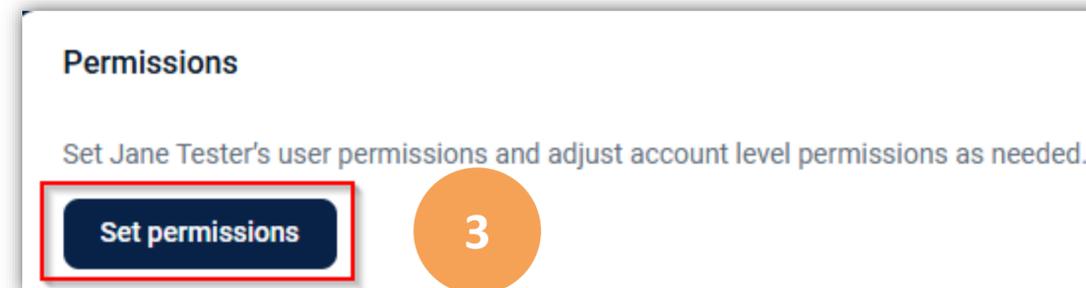
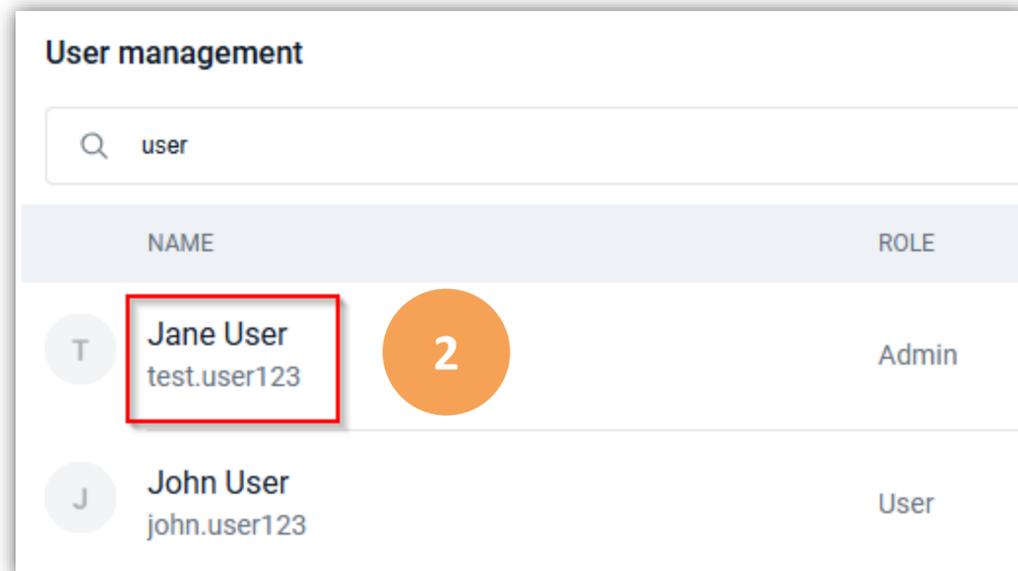
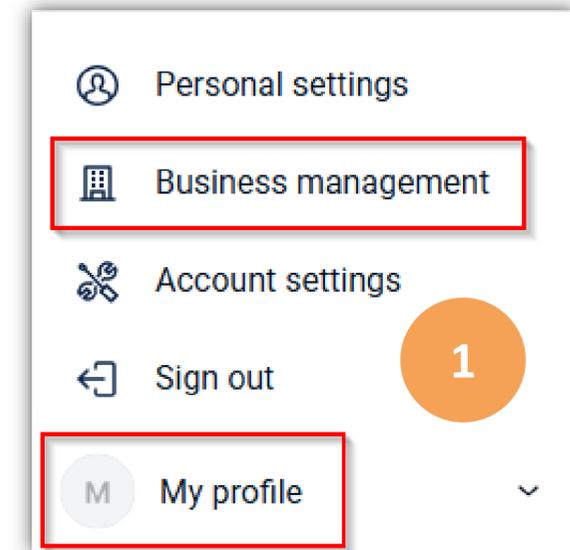
- 1) Navigate to [my.intrustbank.com](https://my.intrustbank.com) and log into your organization's online banking profile.
- 2) Click the **My profile** tab at the bottom left of your **Dashboard** and select **Business management**.
- 3) In the **User management** section, select the user that you want to edit.
- 4) In the **Account** section of the user's **User management** page, toggle **ON** the specific account numbers that you want the user to have access to and toggle **OFF** the specific accounts that you *do not* want the user to have access to.
  - a) **NOTE:** If you turn **OFF** access to an account number that the user previously had access to, you will see an additional window that asks you to confirm that you really want to turn off access. Click **Turn off**.



# Online and Mobile Banking – User Administration

## Update a User’s Account-Level Permissions

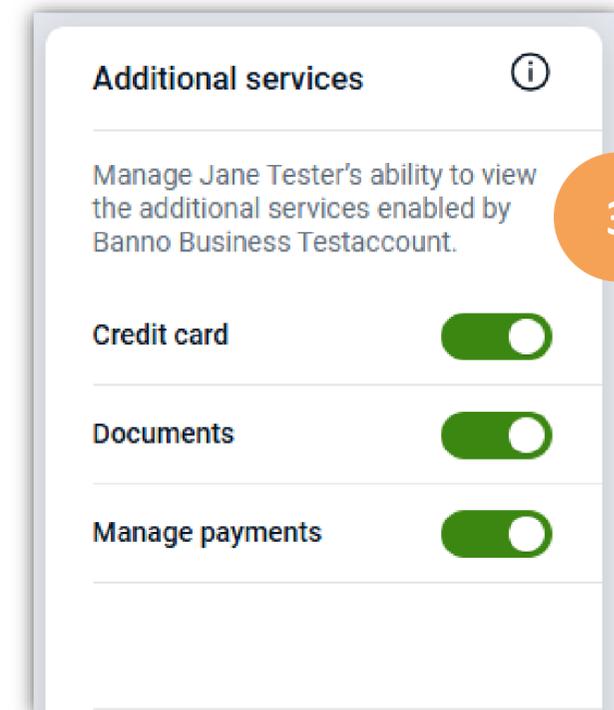
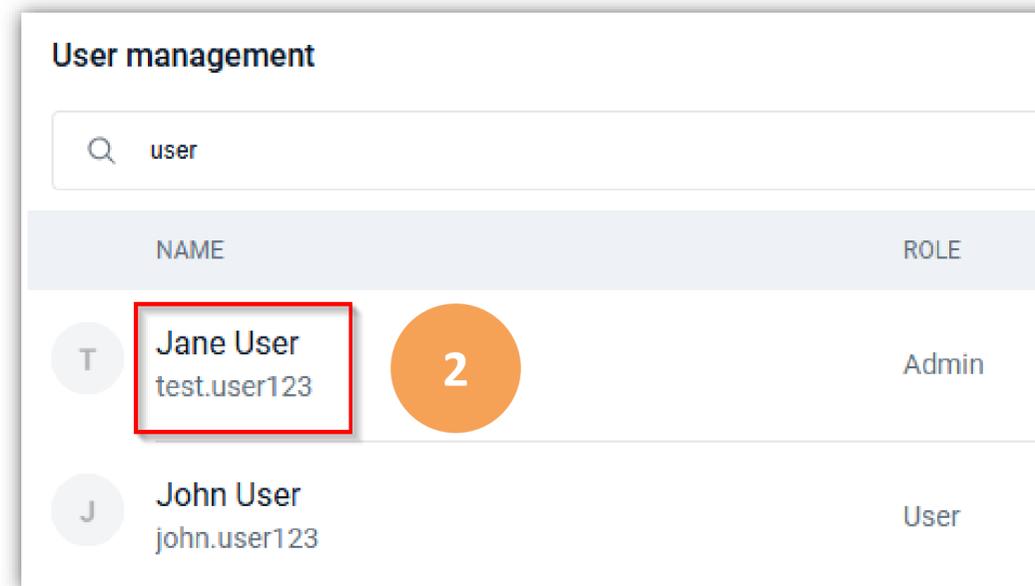
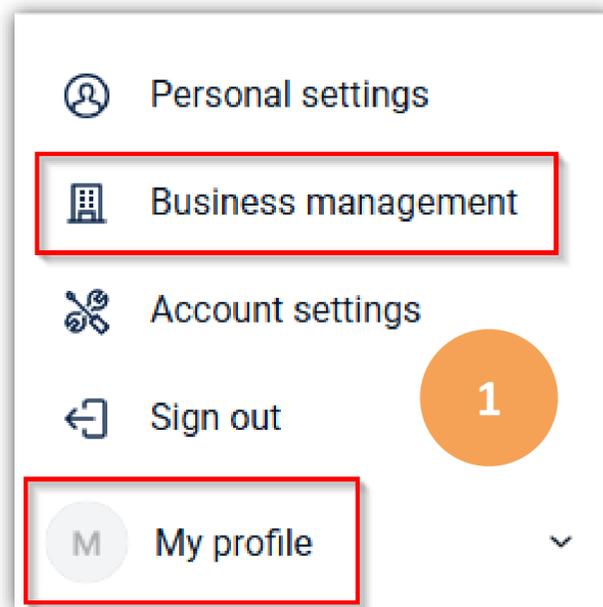
- 1) Click the **My profile** tab at the bottom left of your Dashboard and select **Business management**.
- 2) In the **User management** section, select the user that you want to edit.
- 3) In the **Permissions** section of the user’s **User management** page, click **Set permissions**.
- 4) **Enable** or **Disable** the applicable permissions on the page (**Bill Pay, Card Management, Stop payments, Transfers, and User management**).
  - a) **NOTE:** Even if a user has an **Admin role**, they must also have the **User management permission** enabled to be able to make changes to users.
- 5) Click the **back arrow** beside the user’s name at the top left of the page to return to the user’s **User management** page.



# Online and Mobile Banking – User Administration

## Update a User’s Additional Services Access

- 1) Click the **My profile** tab at the bottom left of your Dashboard and select **Business management**.
- 2) In the **User management** section, select the user that you want to edit.
- 3) In the **Additional services** section of the user’s **User management** page, toggle **ON** or **OFF** the specific additional services that you want the user to have access to.
  - a) **Credit Card:** View link to a credit card management site.
  - b) **Documents:** View advanced settings link for Documents.
    - **NOTE:** The user must have an *Admin* role to manage advanced settings.
  - c) **Manage Payments:** View link to advanced Bill Pay settings.
    - **NOTE:** The 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.**”

ENDORSE HERE

Your Endorsement

Mobile Deposit INTRUST Bank

CHECK HERE FOR MOBILE OR REMOTE DEPOSIT ONLY

AT \_\_\_\_\_ DATE \_\_\_\_\_

NAME OF FINANCIAL INSTITUTION

DO NOT WRITE, STAMP OR SIGN BELOW THIS LINE  
RESERVED FOR FINANCIAL INSTITUTION USE \*

Where available, security features exceed industry guidelines.

Chemically Sensitive Paper and \* Silver no-ink® may appear in black ink.  
Chemical Wash Detection Area \* Attempts at tampering are traceable.

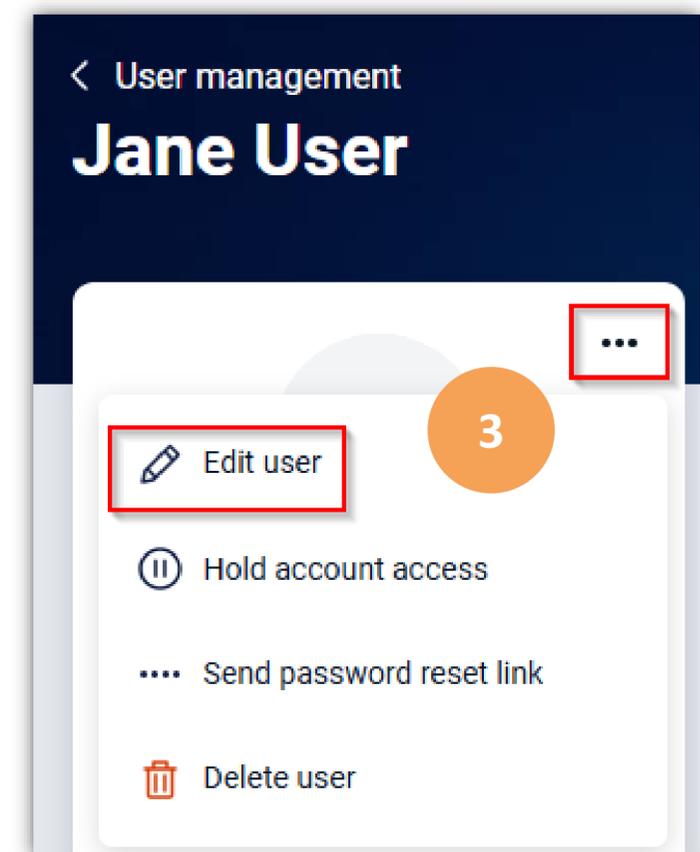
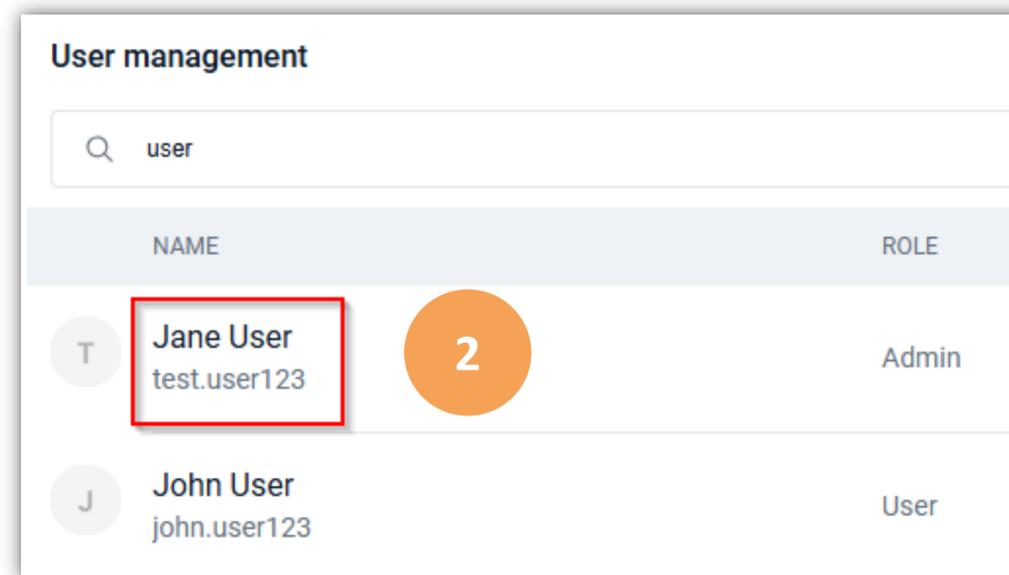
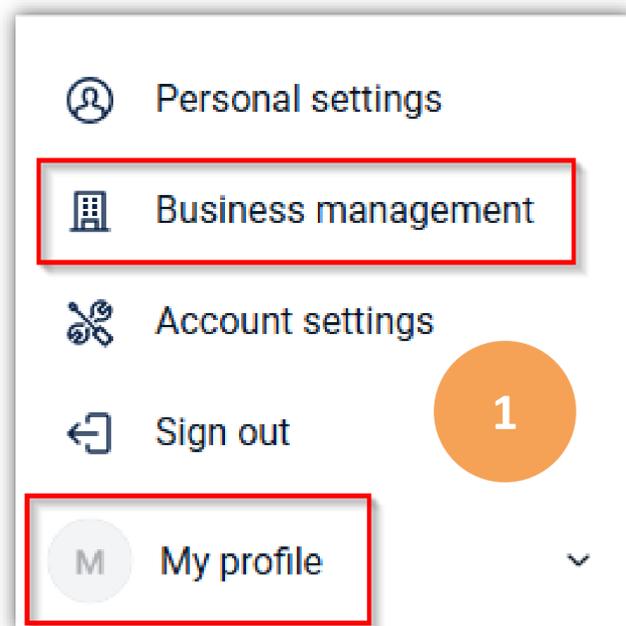
Serial Adhesion Properties \* Chemically sensitive paper and silver no-ink® may appear in black ink.  
will help. Damage to the surface will be visible.

RD-100

# Online and Mobile Banking – User Administration

## Edit a User's Name, Role, or Email Address

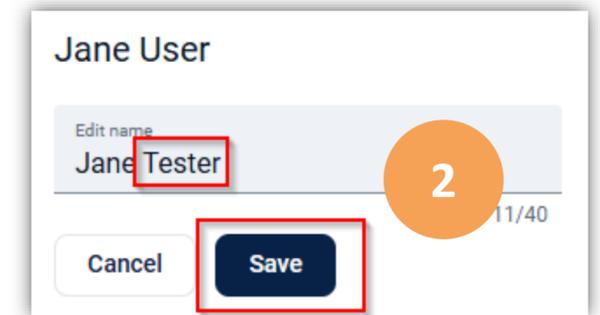
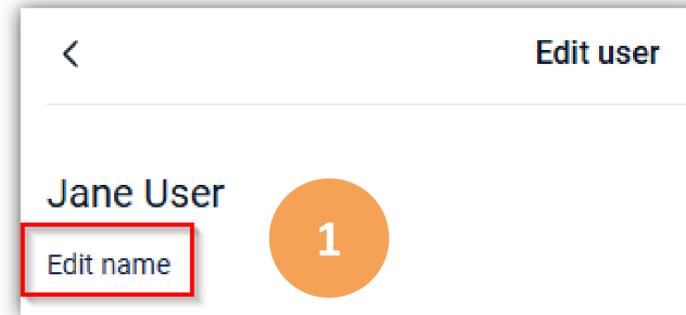
- 1) Click the **My profile** tab at the bottom left of your Dashboard and select **Business management**.
- 2) In the **User management** section, select the user that you want to edit.
- 3) On the user's **User management** page, click the 3 dots at the top right of their name card and select **Edit user**.



# Online and Mobile Banking – User Administration

## Edit a User's Name

- 1) Click the **Edit name** link underneath the user's name.
- 2) Update the user's name. Then, click **Save**.



## Edit a User's Role

- 1) Click the **User role** drop-down menu.
- 2) Select the user's new role.

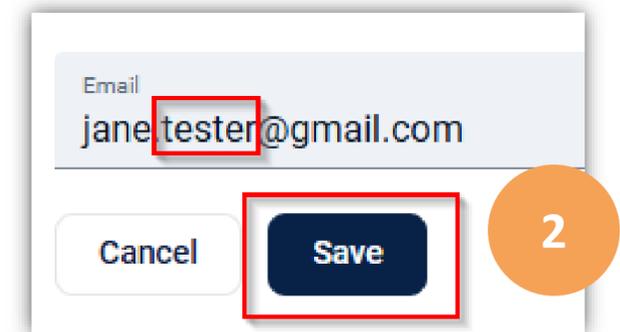
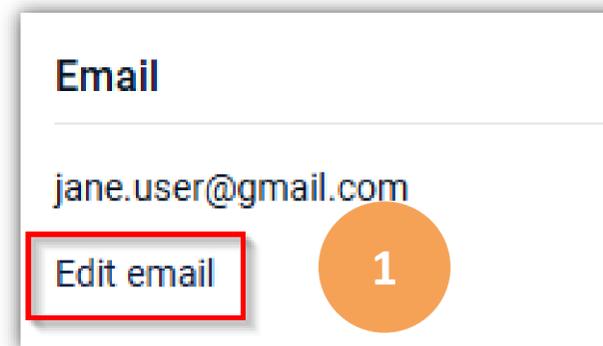
**NOTE:** A comparison of the different user roles is available on the next page of this guide.



## Edit a User's Email Address

- 1) Click the **Edit email** link underneath the user's current email address.
- 2) Update the user's email address. Then, click **Save**.

**NOTE:** Users with a **non-Admin** role *cannot* update their own email address. Users with an Admin role can update the email address for other users *and* themselves.



# Online and Mobile Banking – User Administration

## User Roles Comparison

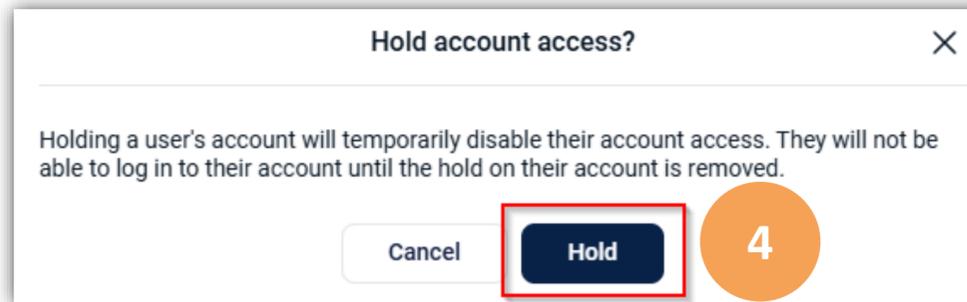
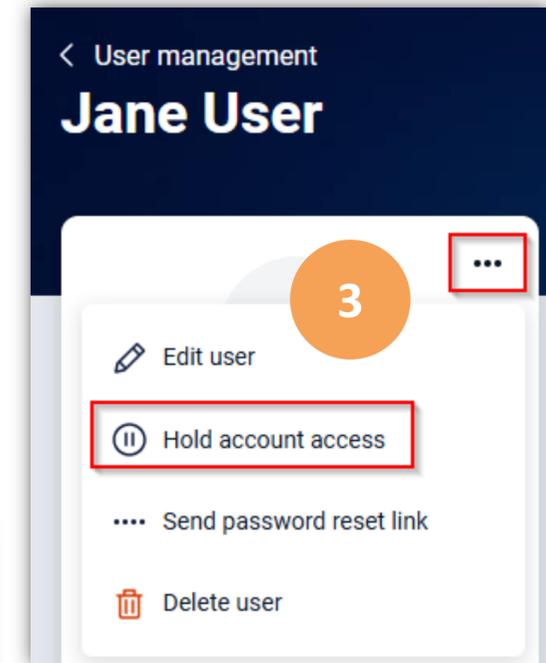
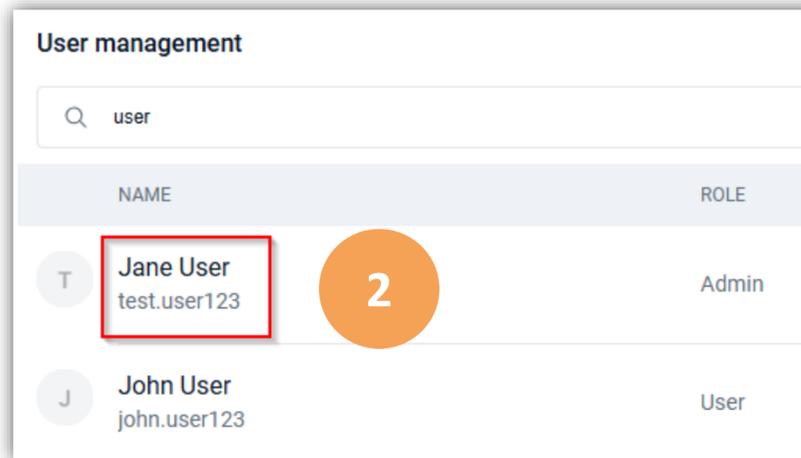
|                               | Admin | Viewer | User |
|-------------------------------|-------|--------|------|
| Move funds                    | Y     | Y      | Y    |
| View users                    | Y     | Y      |      |
| Create users                  | Y     |        |      |
| Delete users                  | 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 – User Administration

## Hold a User's Account Access

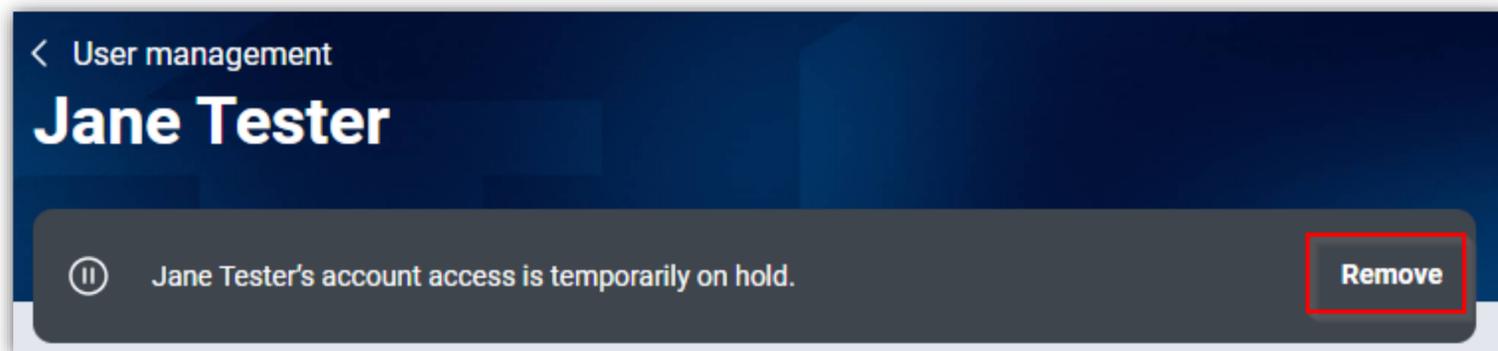
If you want to temporarily disable a user's ability to access your organization's online banking profile, follow the steps below.

- **NOTE:** The user will not be able to log into their account until the hold on their account access is removed.
- 1) Click the **My profile** tab at the bottom left of your Dashboard and select **Business management**.
  - 2) In the **User management** section, select the user whose account access you want to disable.
  - 3) On the user's **User management** page, click the 3 dots at the top right of their name card and select **Hold account access**.
  - 4) Click **Hold** again.



## Remove Account Access Hold

- 1) Select the applicable user from the **User management** section.
- 2) Click **Remove** at the far right of the gray banner across the top of the user's **User management** page.

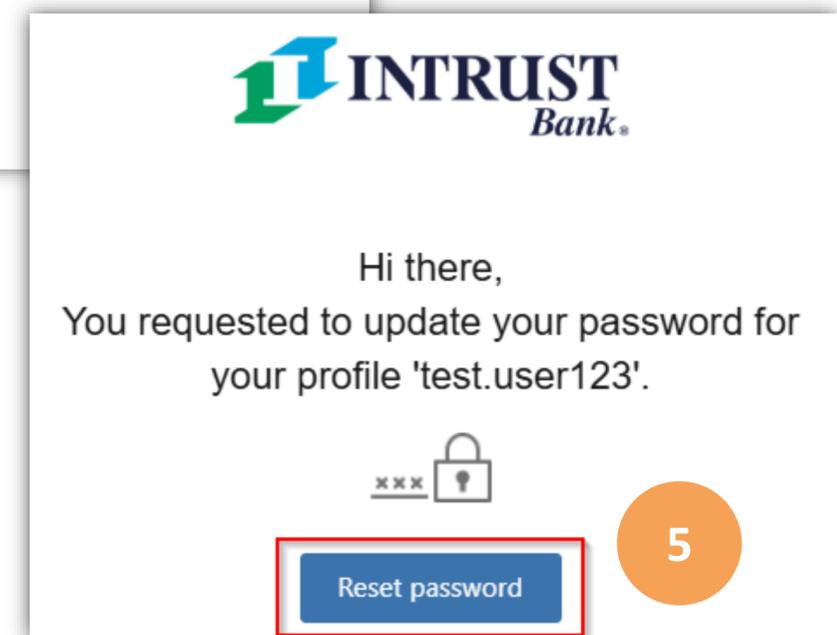
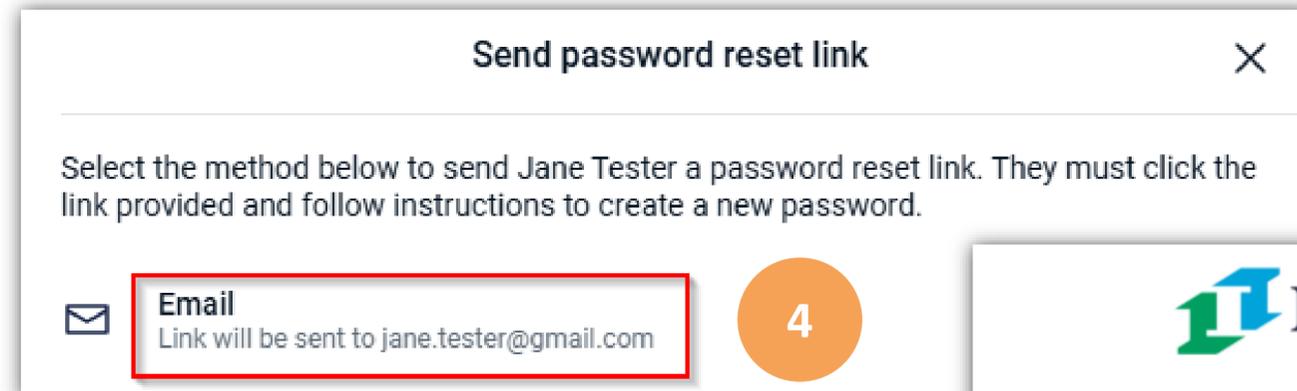
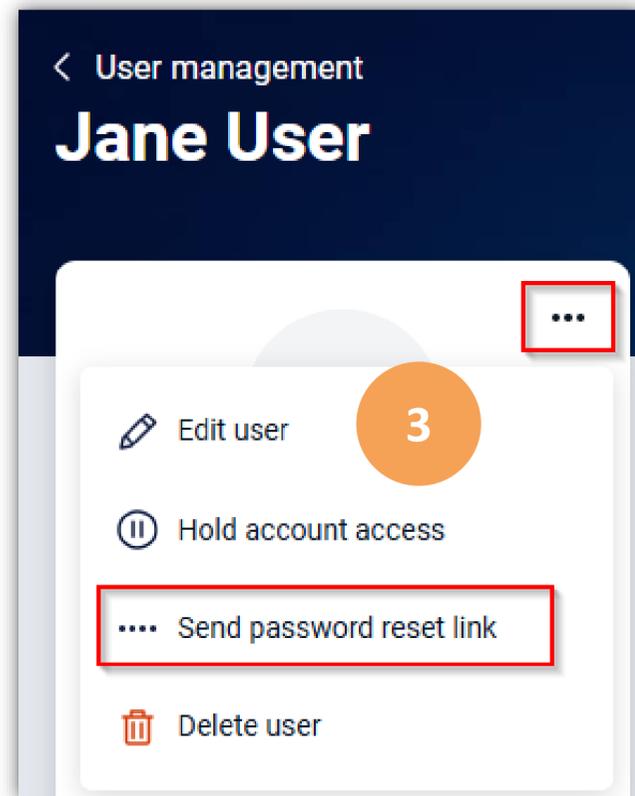


# Online and Mobile Banking – User Administration

## Send a User a Password Reset Link

- 1) Click the **My profile** tab at the bottom left of your Dashboard and select **Business management**.
- 2) In the **User management** section, select the user who needs to reset their password.
- 3) On the user's **User management** page, click the 3 dots at the top right of their name card and select **Send password reset link**.
- 4) In the following window, click the **Email** method.
- 5) The user will receive a **Password reset instructions** email from *INTRUST@intrustbank.com* with a link that they will click on to reset their password.

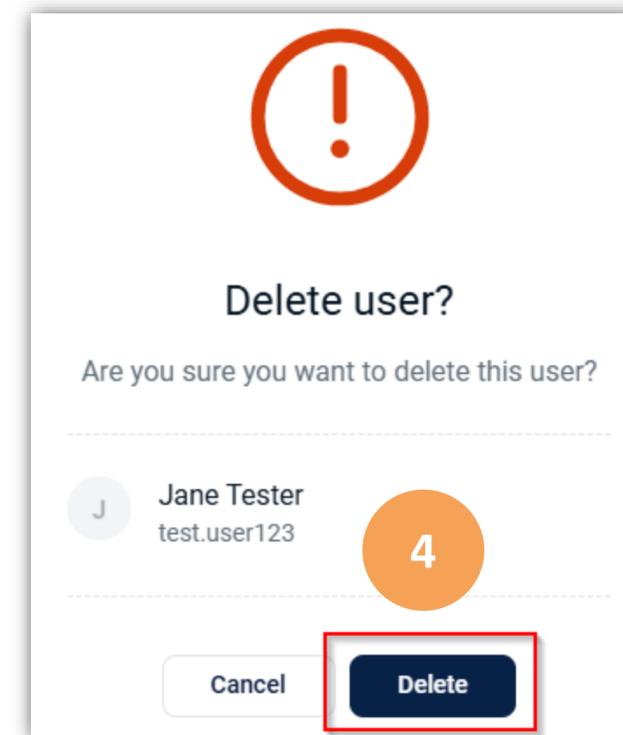
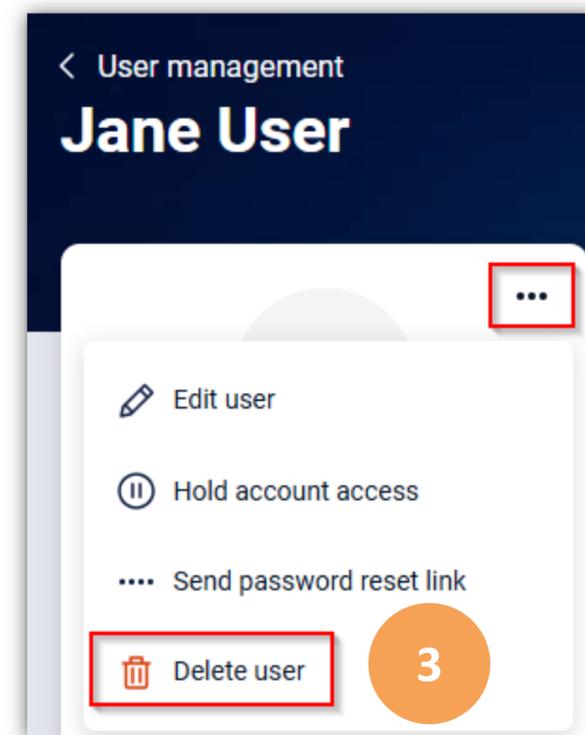
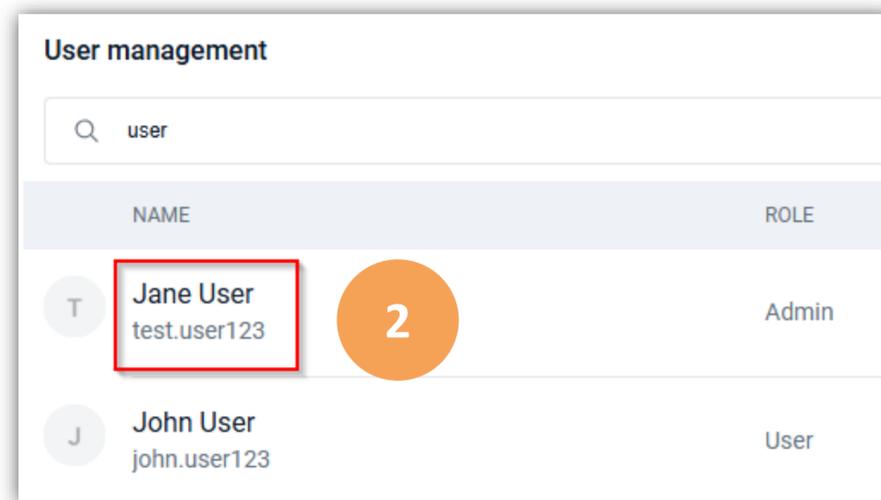
| User management             |       |
|-----------------------------|-------|
| Q                           | user  |
| NAME                        | ROLE  |
| T Jane User<br>test.user123 | Admin |
| J John User<br>john.user123 | User  |



# Online and Mobile Banking – User Administration

## Delete a User

- 1) Click the **My profile** tab at the bottom left of your Dashboard and select **Business management**.
- 2) In the **User management** section, select the user that you want to delete.
- 3) On the user's **User management** page, click the 3 dots at the top right of their name card and select **Delete user**.
- 4) You will see an additional window asking you to confirm that you are sure you want to delete the user. Click **Delete**.

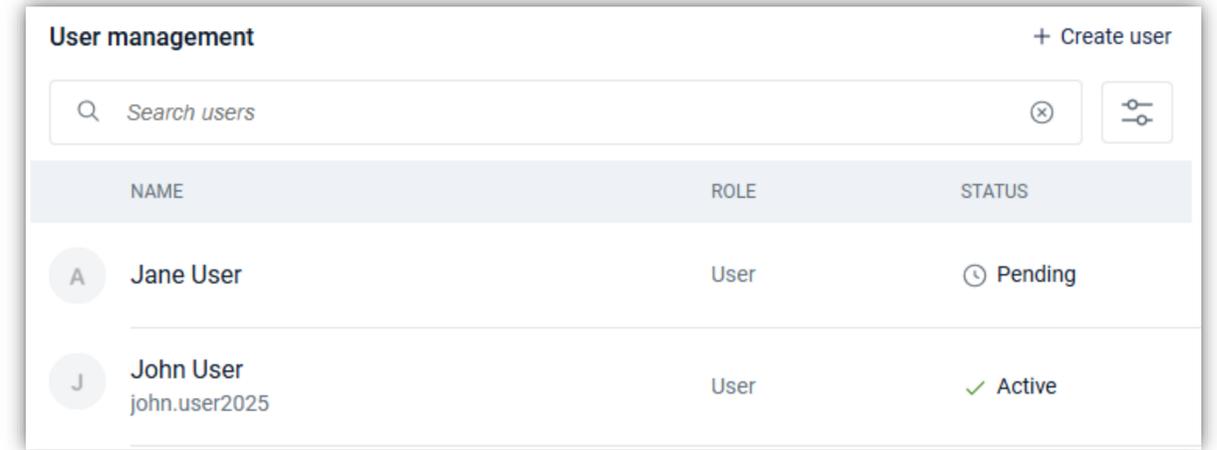
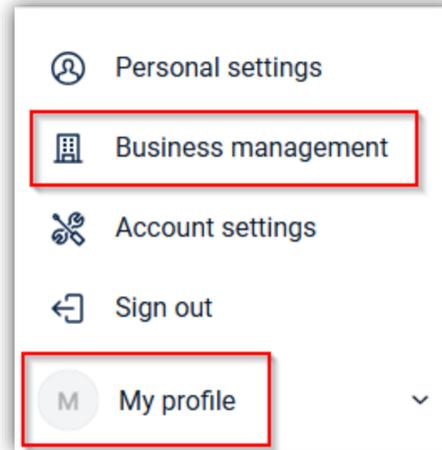


# Online and Mobile Banking – User Administration

## Filter User Management Page

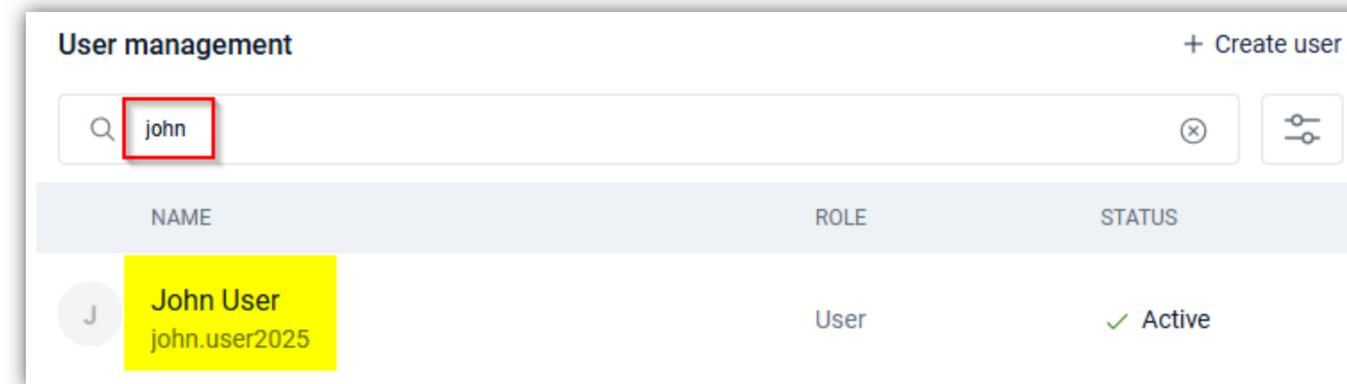
As more users are added to your organization’s online banking profile, it may be beneficial to **filter** the users on the **User management** screen by their **name**, **role**, or **status**.

- Click the **My profile** tab at the bottom left of your Dashboard and select **Business management**.



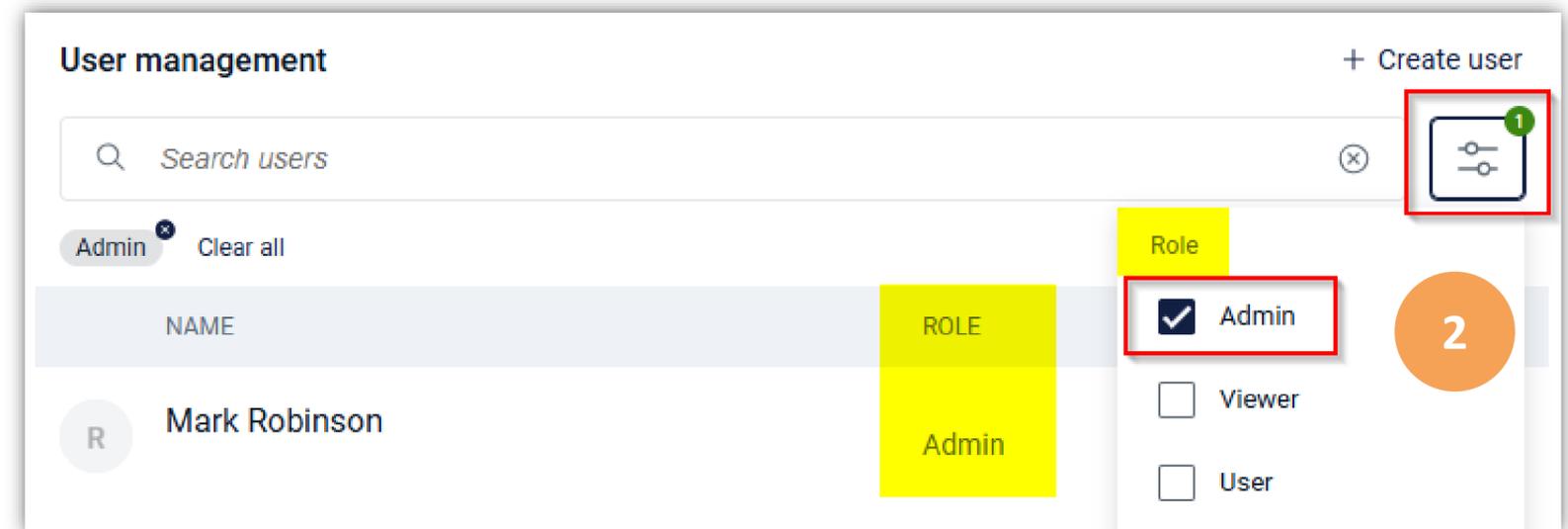
## Filter by User’s Name

In the **Search users** field, type a portion of a user’s name.



## Filter by User’s Role

- 1) Click the **Filter** icon at the top right of the **User management** section (*directly beneath + Create user*).
- 2) Select the applicable **role(s)** that you want to see.
- 3) Click **Done**.



1

2

# Online and Mobile Banking – User Administration

## Filter by User's Status

- 1) Click the **Filter** icon at the top right of the **User management** section (directly beneath + **Create user**).
- 2) Select the applicable **status(es)** that you want to see.
- 3) Click **Done**.

The screenshot shows the 'User management' interface. At the top right, there is a '+ Create user' button and a filter icon (a square with a gear and a vertical line) circled in red with a '1' in an orange circle. Below the search bar, there is a 'Pending' filter button and a 'Clear all' link. The main table has columns for 'NAME' and 'ROLE'. Two users are listed: 'Jane User' (Role: User) and 'Kristen Robinson' (Role: User). A filter menu is open on the right, showing 'Role' options (Admin, Viewer, User) and 'Status' options (Active, Disabled, Dormant, Invited, Locked, Password expired, Pending, Reset). The 'Pending' status option is checked and circled in red with a '2' in an orange circle. At the bottom of the filter menu, there is a 'Clear all' link and a 'Done' button circled in red with a '3' in an orange circle.

## Clear Filters

Click the **Clear all** link at the top left of the **User management** section.

The screenshot shows the 'User management' interface. At the top left, there is a search bar and a 'Clear all' link circled in red.

## Change Account Nickname(s)

In your organization's online banking profile, you will see *default account nicknames* for your accounts (ex: **Fr B Chk 0001**, **Fr B Chk 0002**, etc.). If you want to change these account nicknames, follow the steps below.

- 1) Select the **Messages** tab in the left panel of your Dashboard.
- 2) Click **Send us a message**.
- 3) In the **Type your message** field, enter the details of your request (ex: "Please change the account nickname of Fr B Chk 0001 to *Payroll Account* and Fr B Chk 0002 to *Expense Account*").
- 4) Click **Send**.

