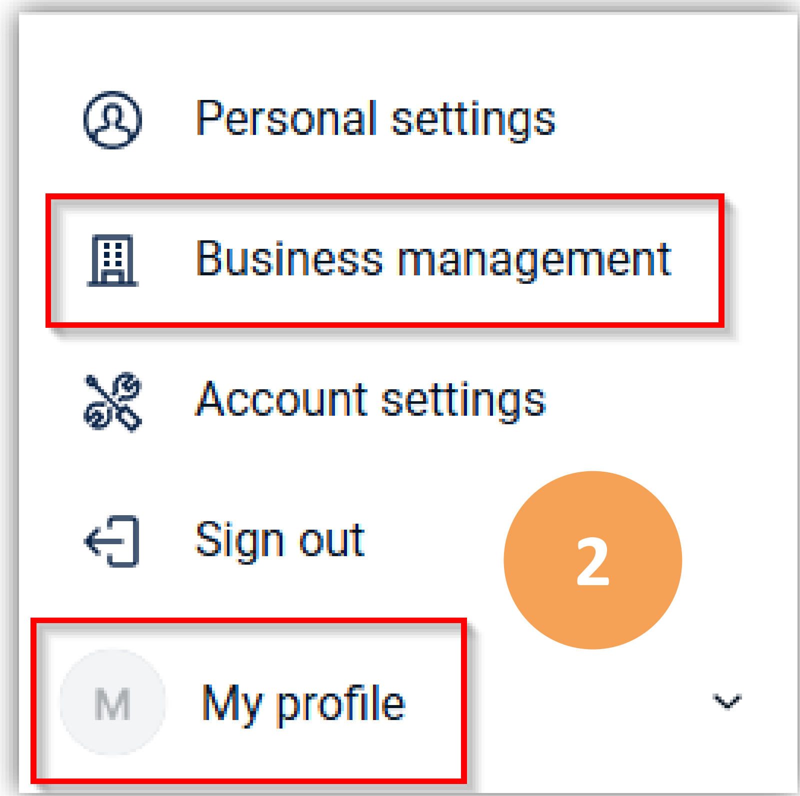
User Administration

Quick Reference Guide

Edit a User’s Access to Specific Accounts

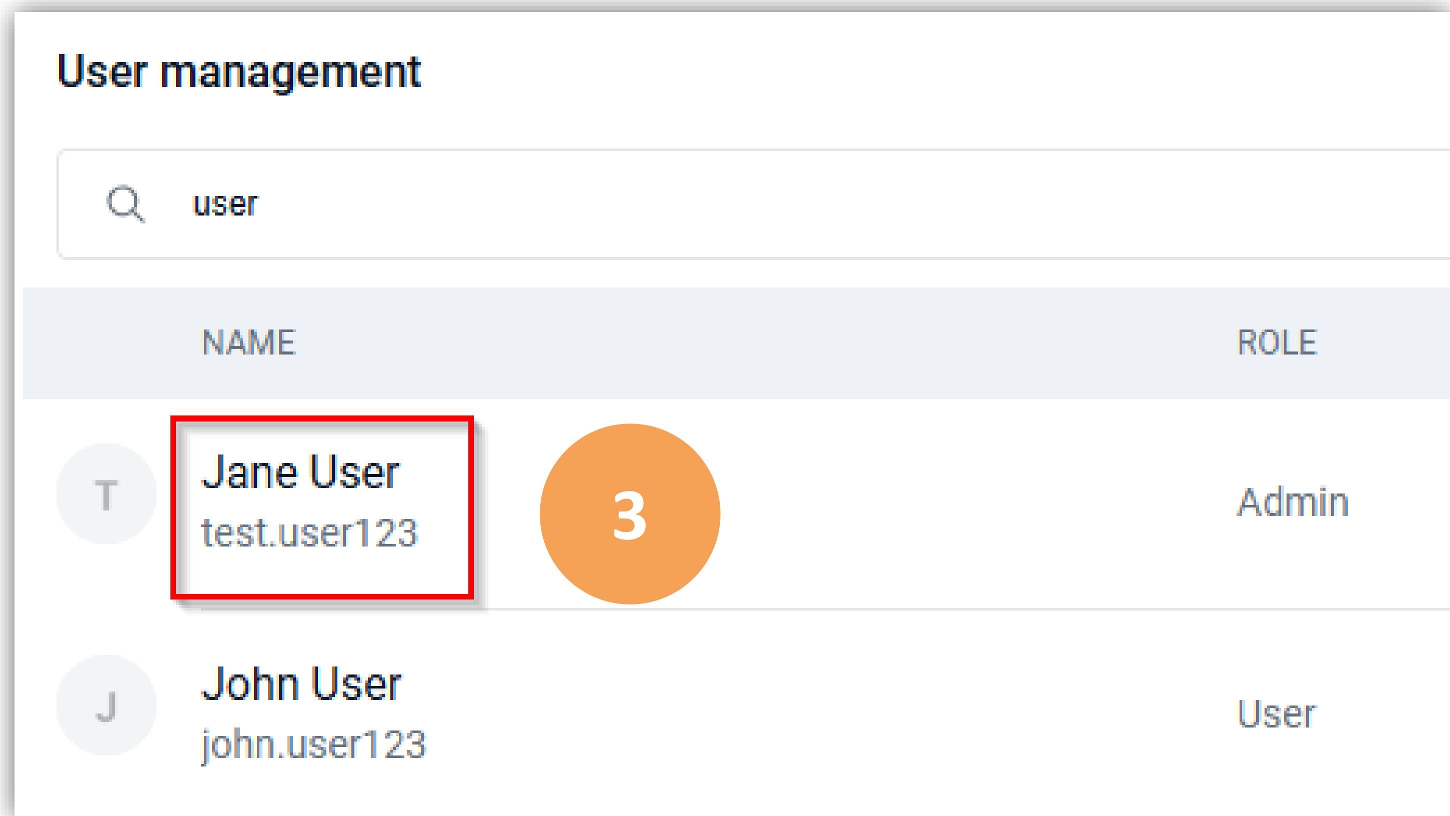


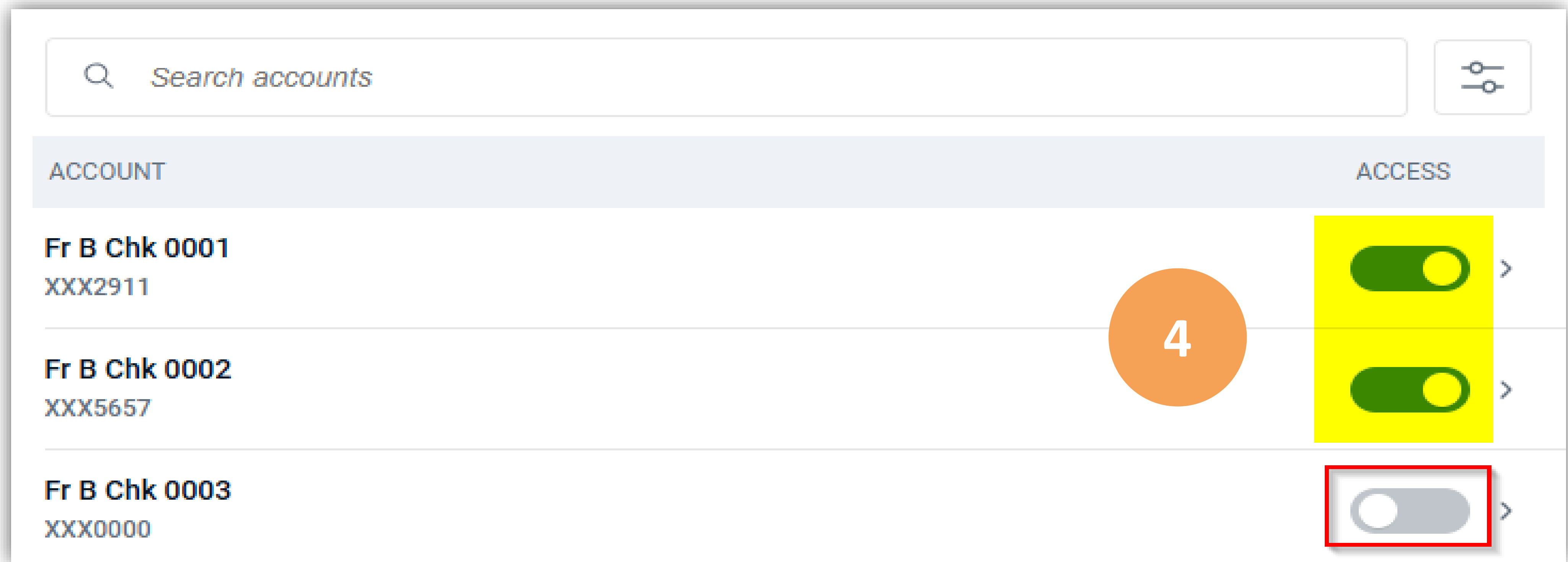
1) Navigate to my.intrustbank.com and log into your organization’s online banking profile.

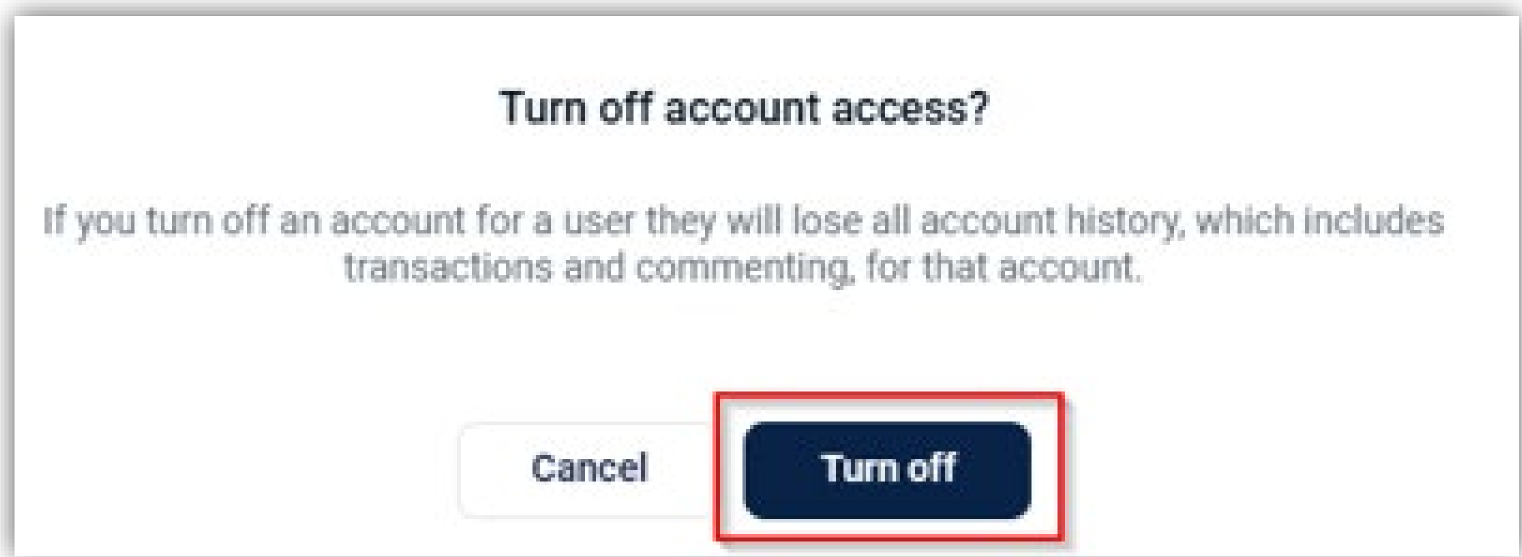
2) Click the **My profile** tab at the bottom left of your **Dashboard** and select **Business management**.

3) In the **User management** section, select the user that you want to edit.

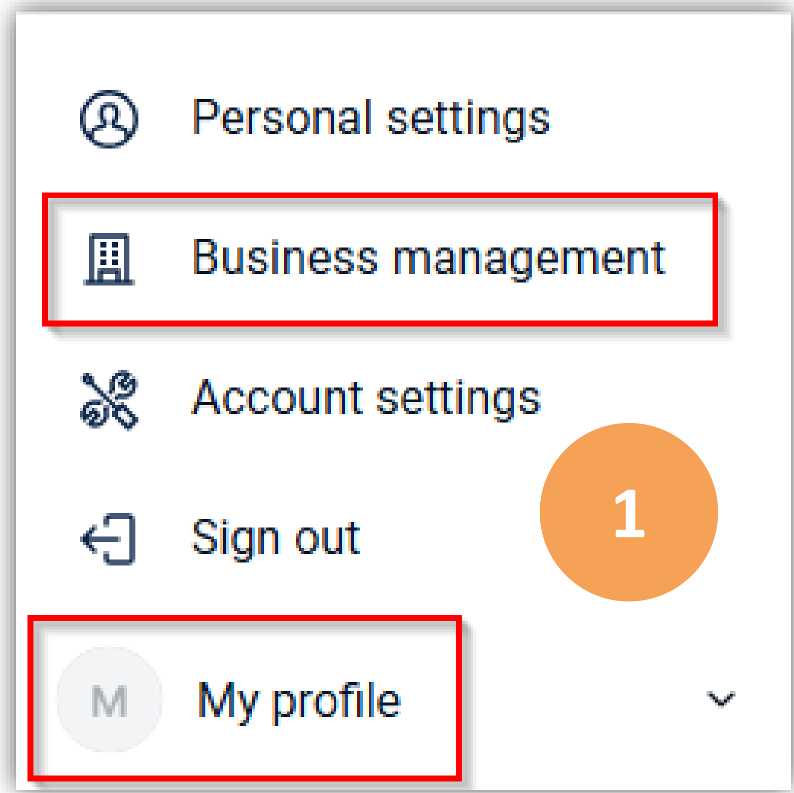
4) In the **Account** section of the user’s **User management** page, toggle ***ON*** the specific account numbers that you want the user to have access to and toggle ***OFF*** the specific accounts that you *do not* want the user to have access to.
   a) **NOTE:** If you turn ***OFF*** access to an 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**.







Update a User's Account-Level Permissions



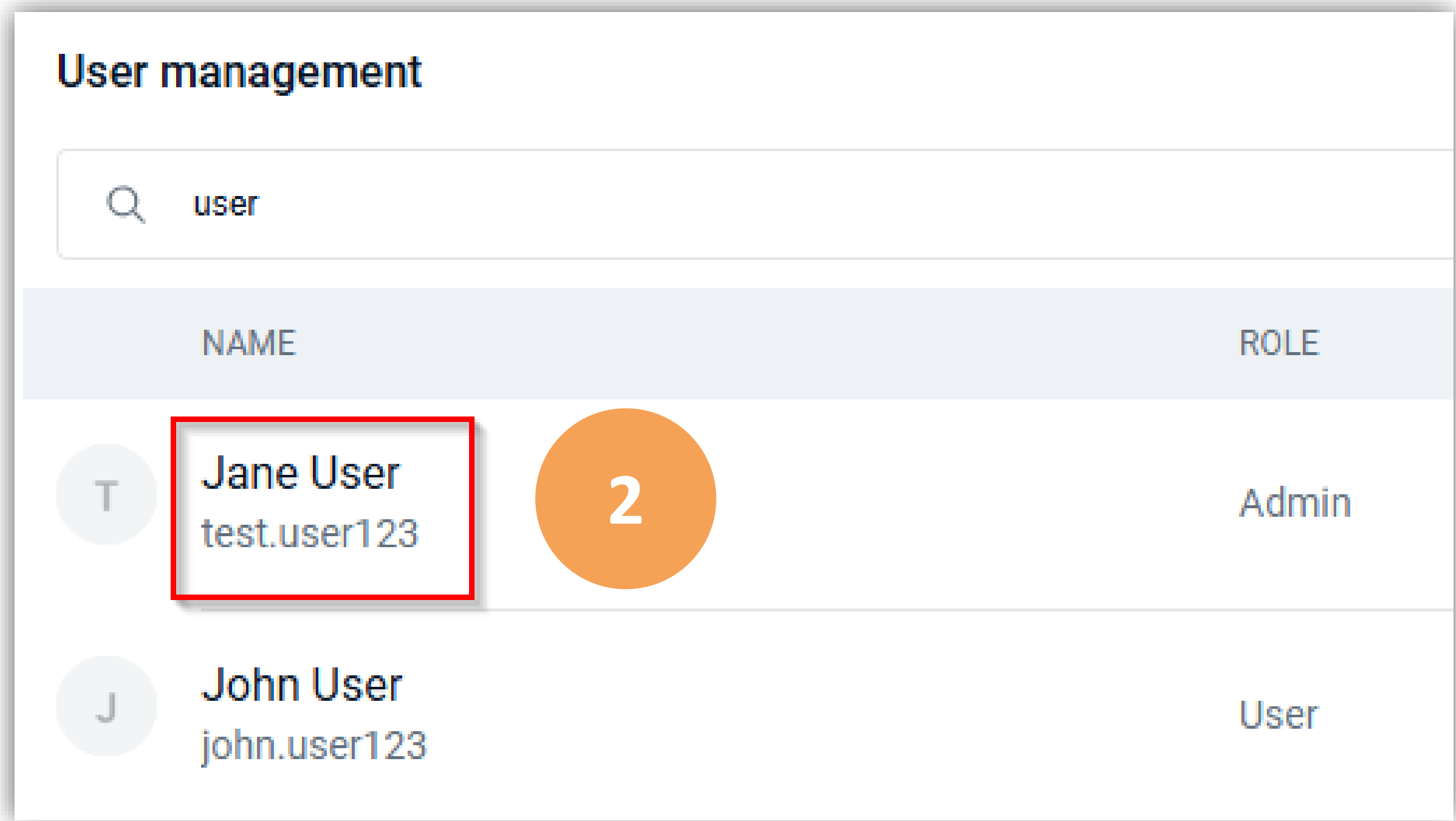
1) Click the **My profile** tab at the bottom left of your Dashboard and select **Business management**.

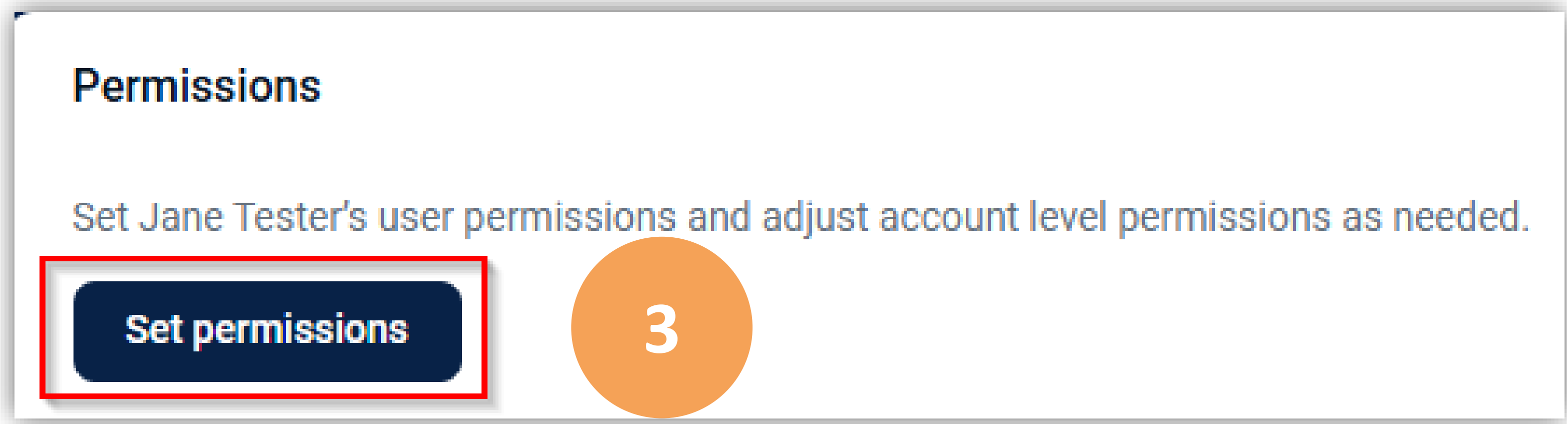
2) In the **User management** section, select the user that you want to edit.

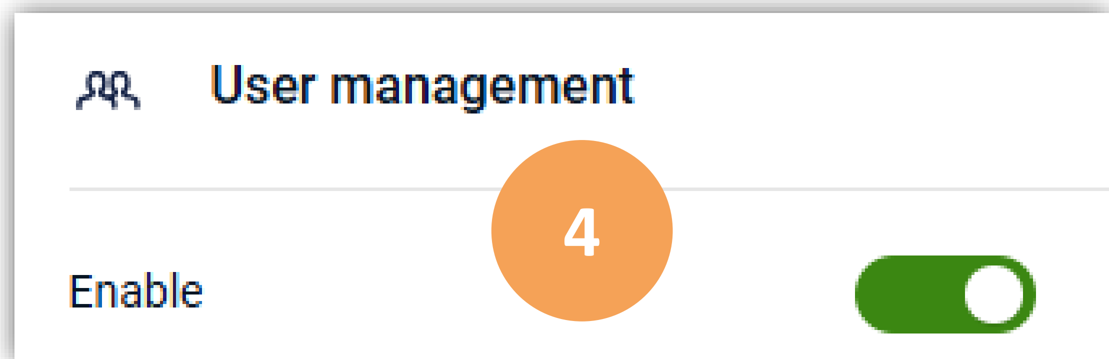
3) In the **Permissions** section of the user's **User management** page, click **Set permissions**.

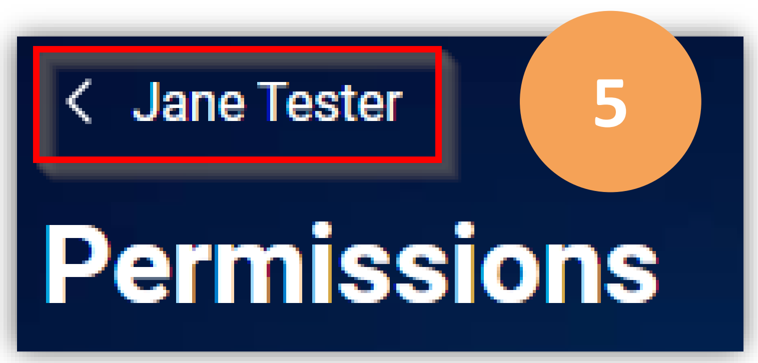
4) **Enable** or **Disable** the applicable permissions on the page **(Bill Pay**, **Card Management**, **Stop payments**, **Transfers**, and **User management)**.
   a) **NOTE:** Even if a user has an **Admin** *role,* they must also have the **User management** *permission* enabled to be able to make 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.









Update a User's Additional Services Access

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

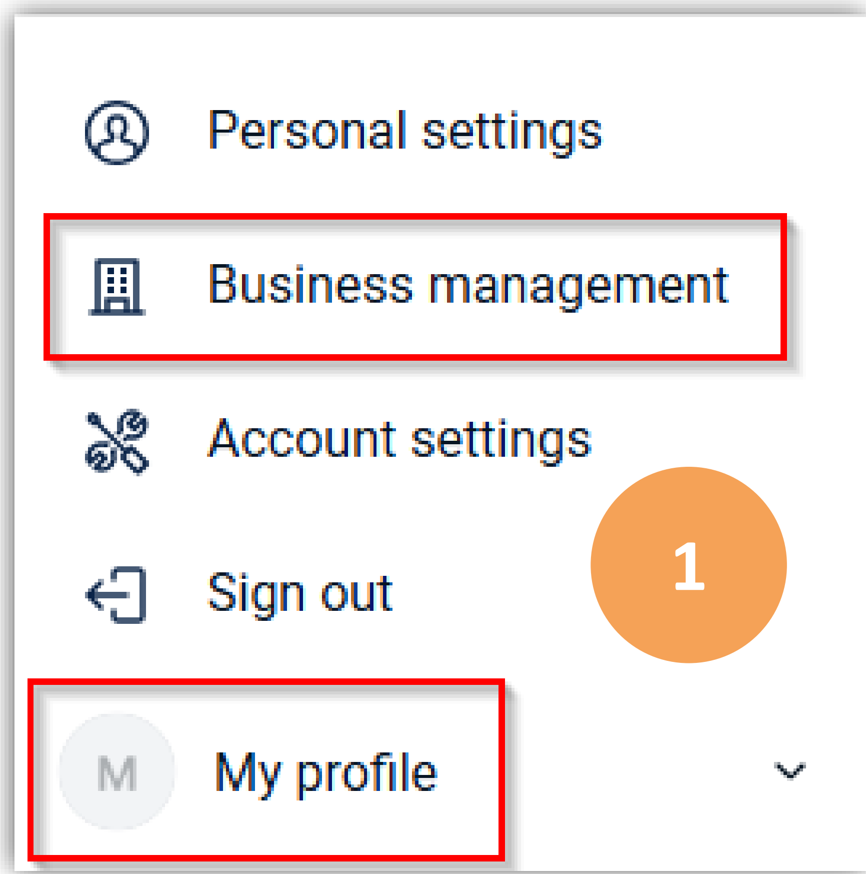
2) In the **User management** section, select the user that you want to edit.

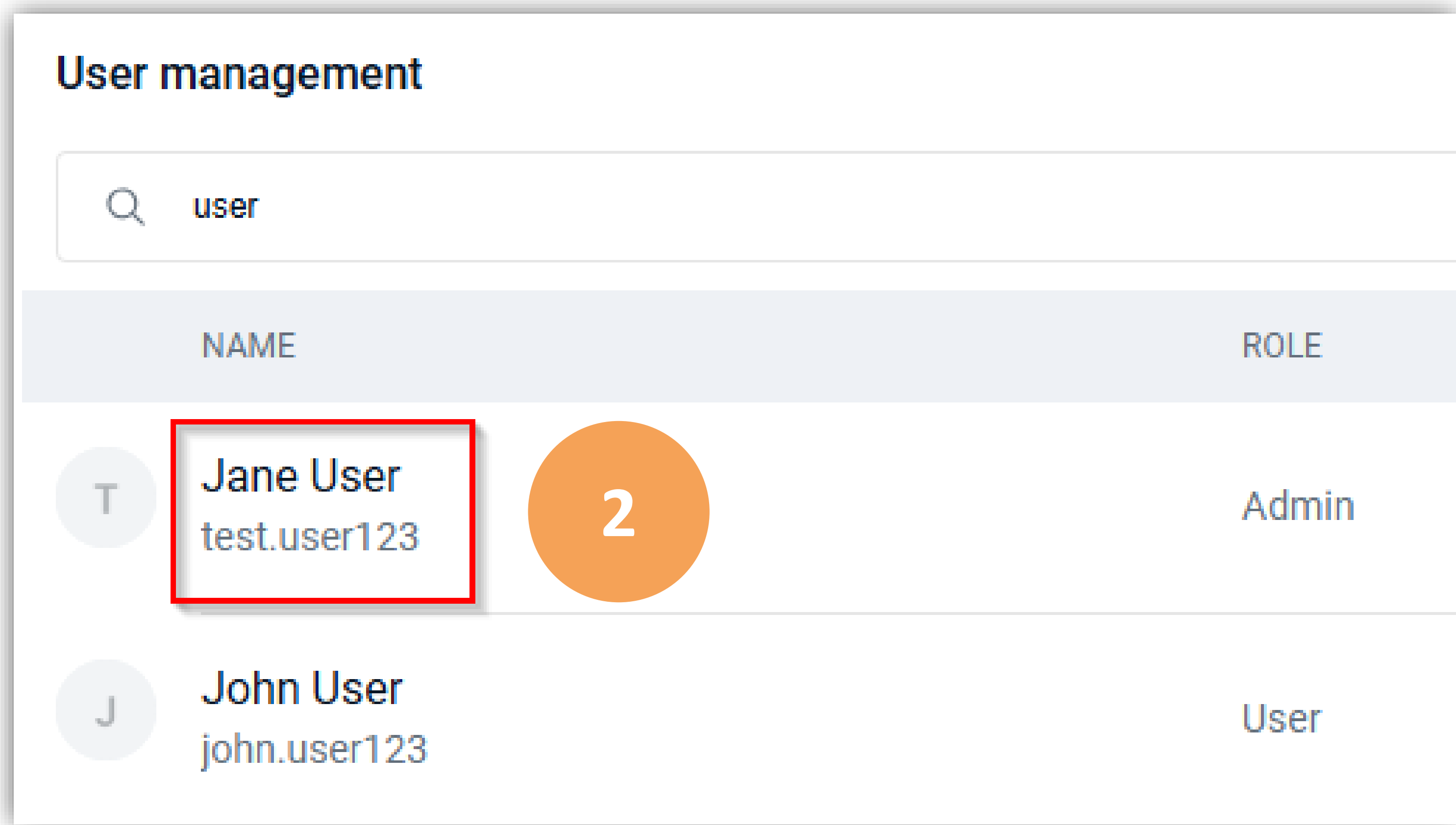
3) In the **Additional services** section of the user's **User management** page, toggle ***ON*** or ***OFF*** the specific additional services that you want the user to have access to.

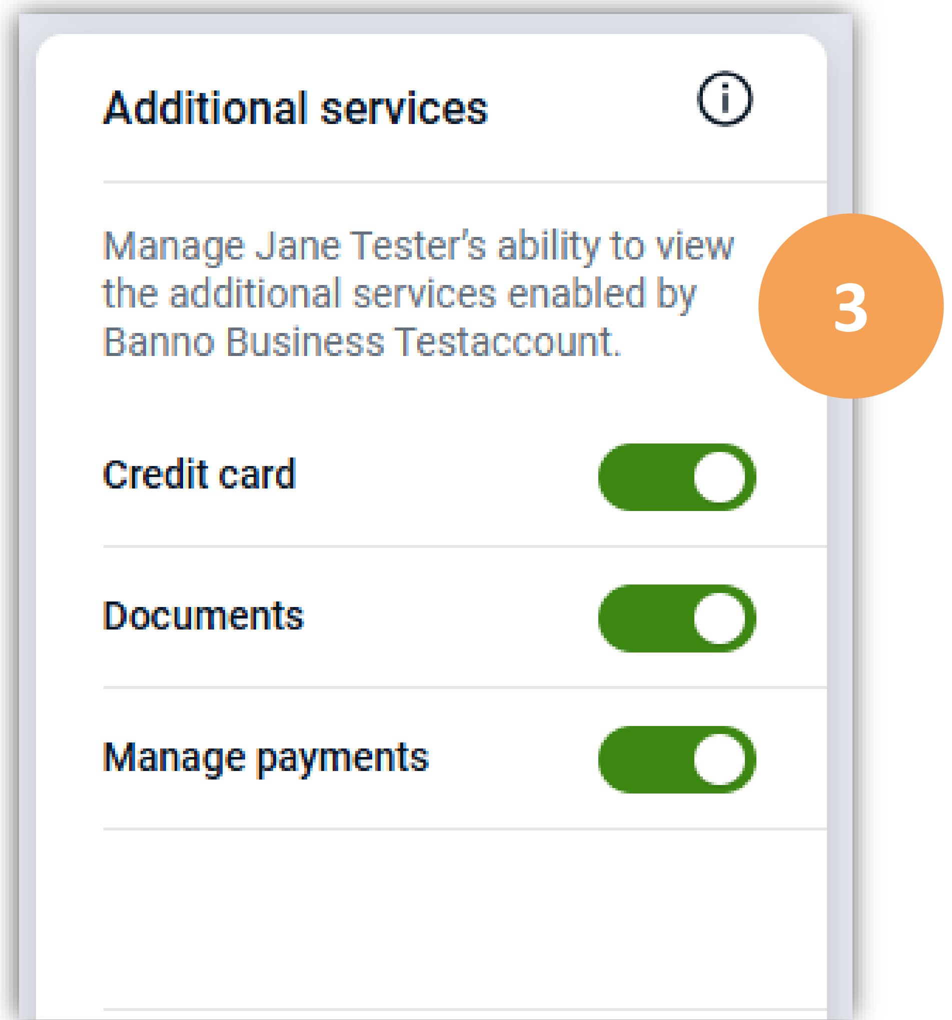
   a) Credit Card: View link to a credit card management site.

   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.

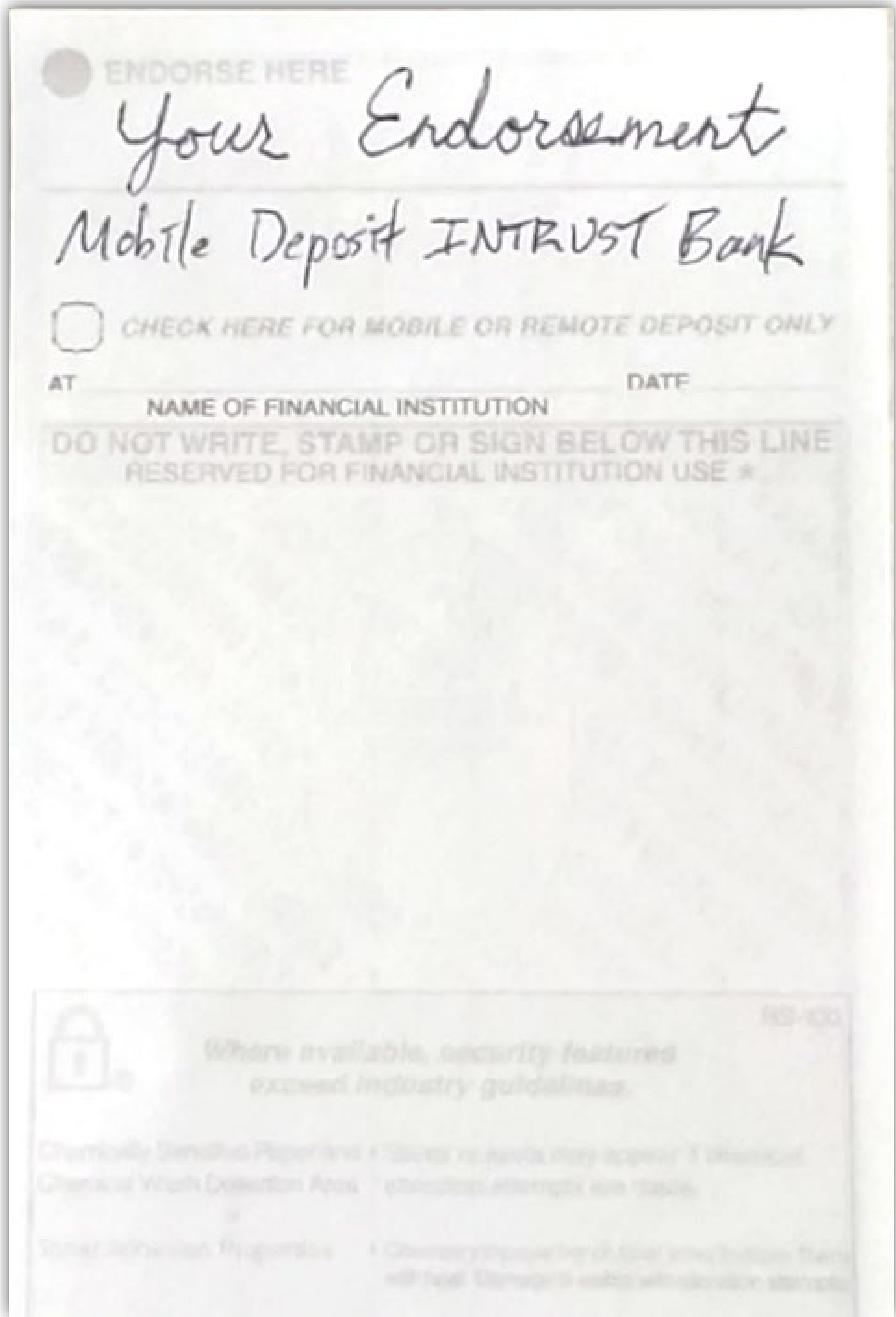






Mobile Check Deposit Considerations

- 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**.”

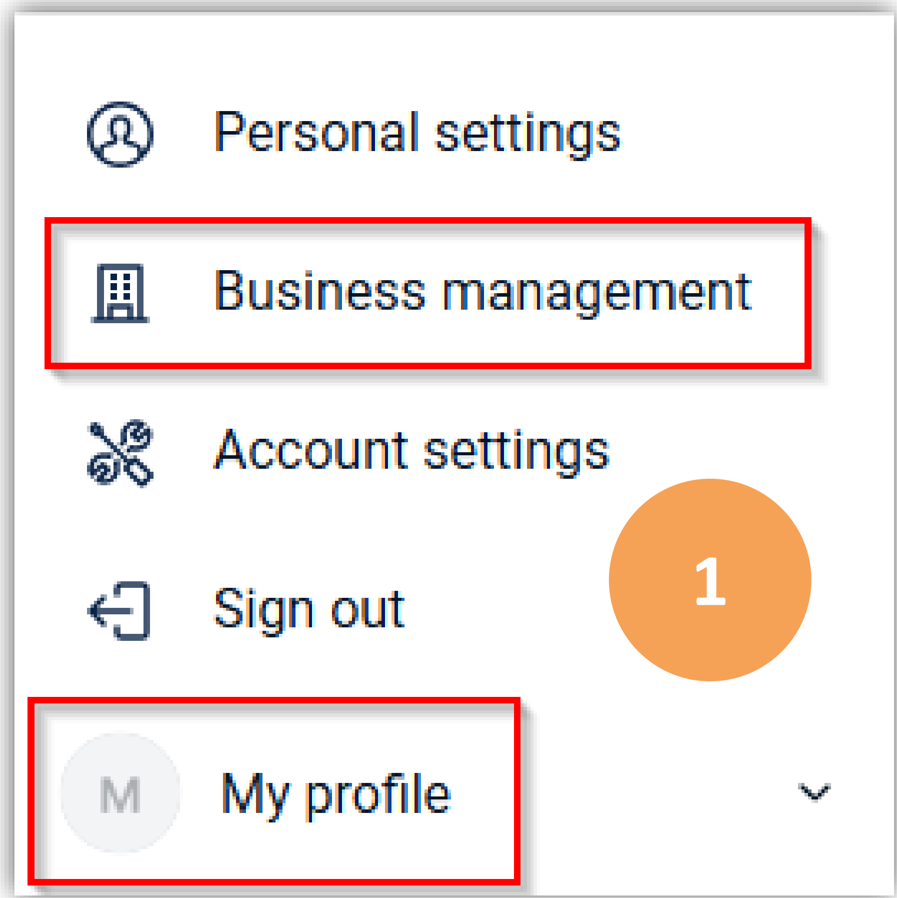


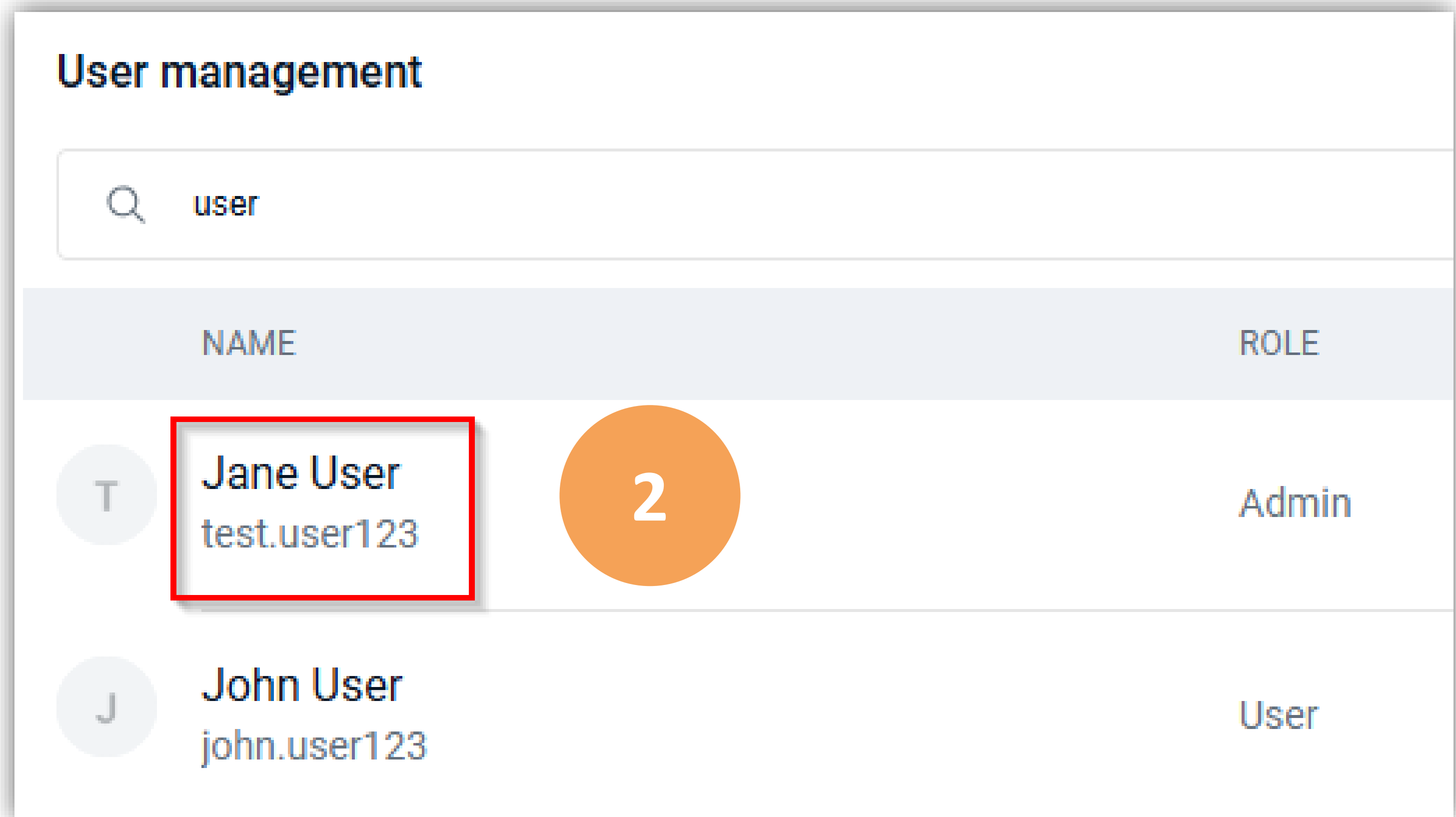
Edit a User’s Name, Role, or Email Address

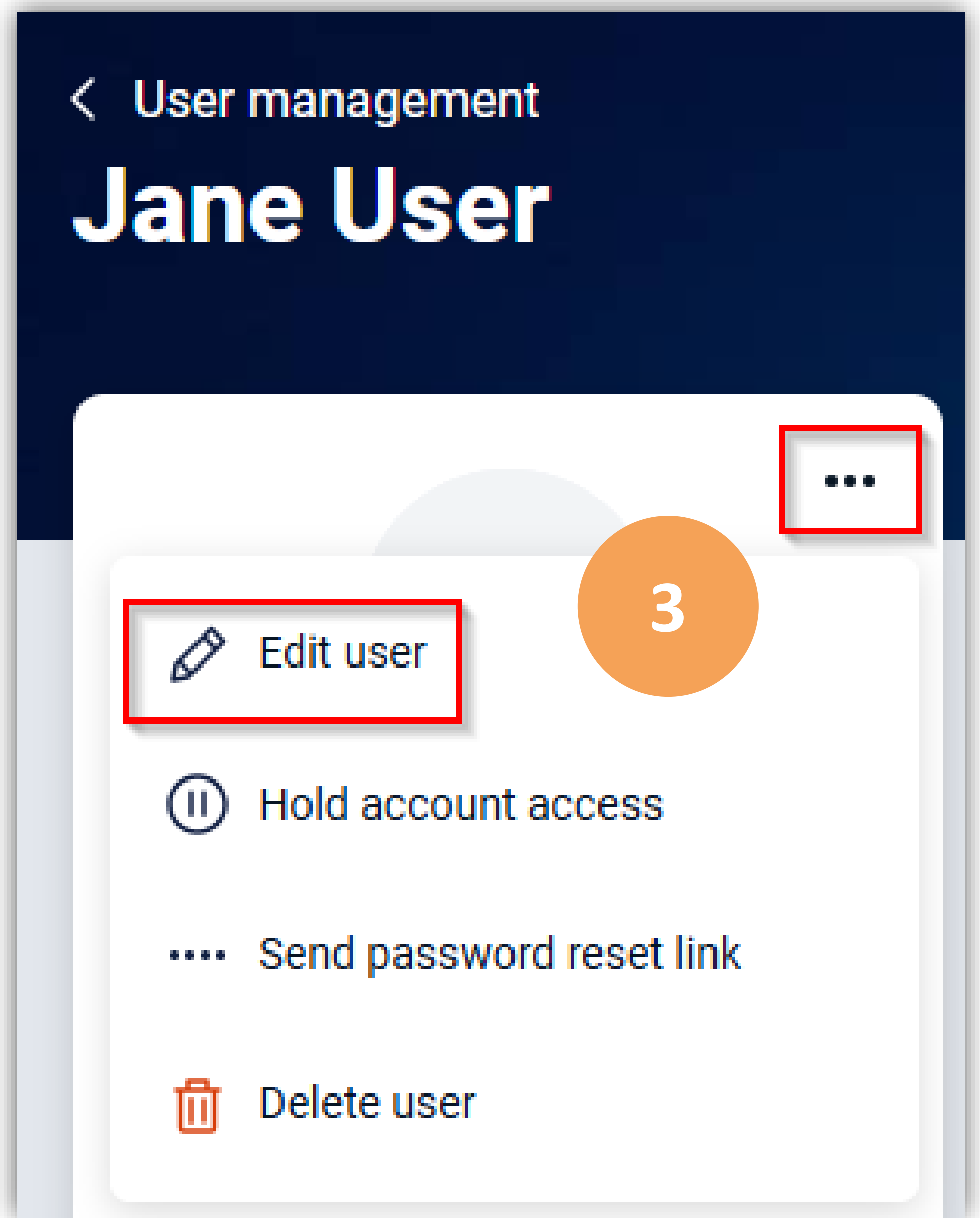
1) Click the **My profile** tab at the bottom left of your Dashboard and select **Business management**.

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**.



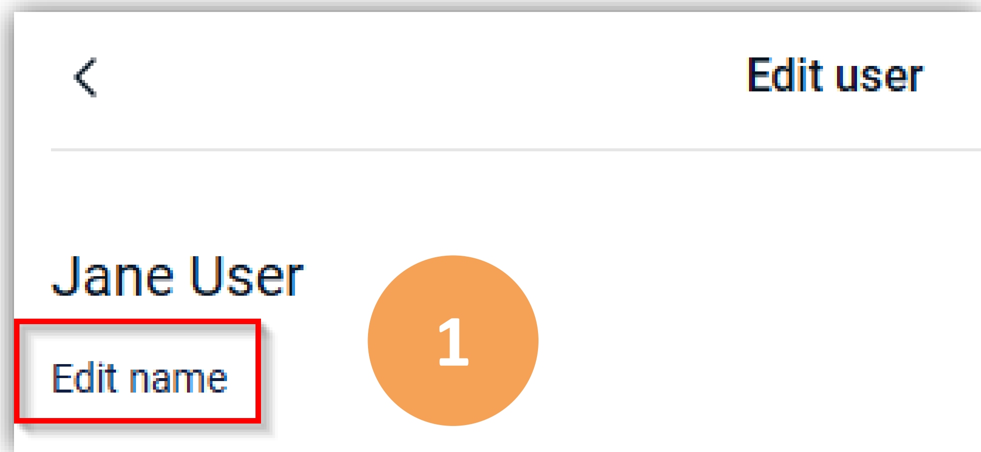


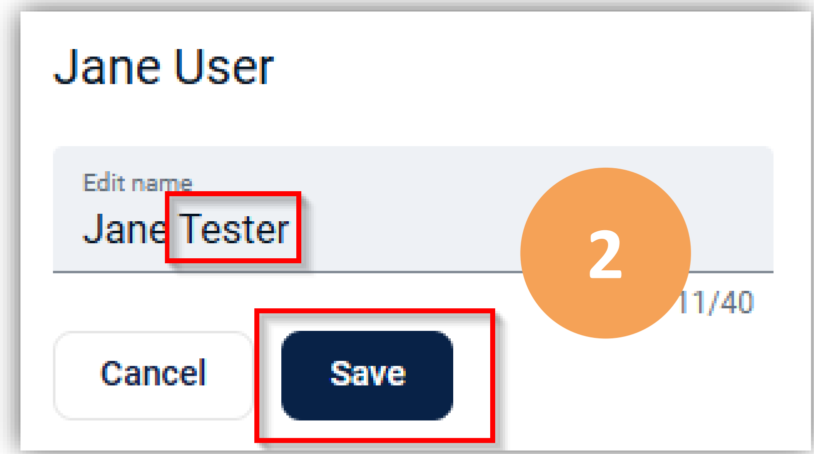


Edit a User's Name

1) Click the **Edit name** link underneath the user's name.

2) Update the user's name. Then, click **Save**.



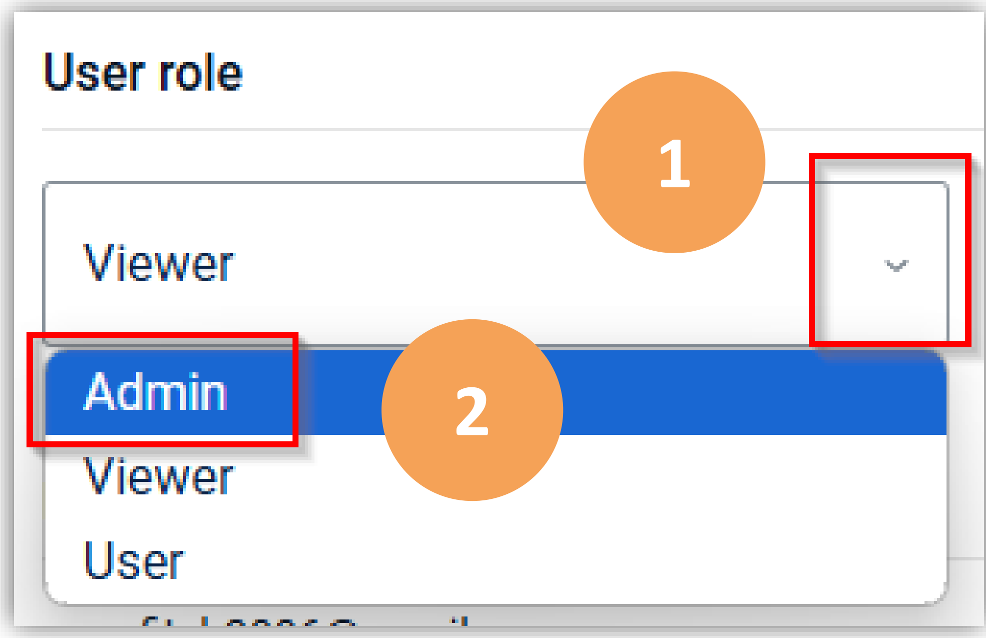


Edit a User's Role

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.

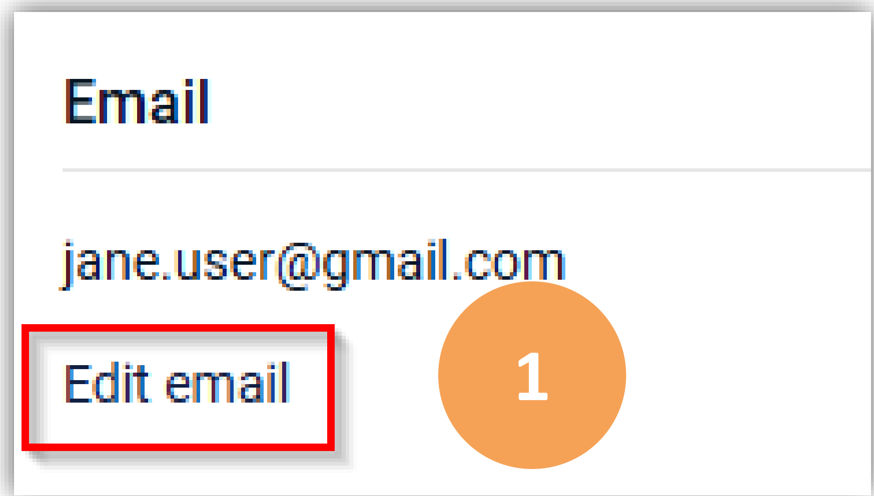


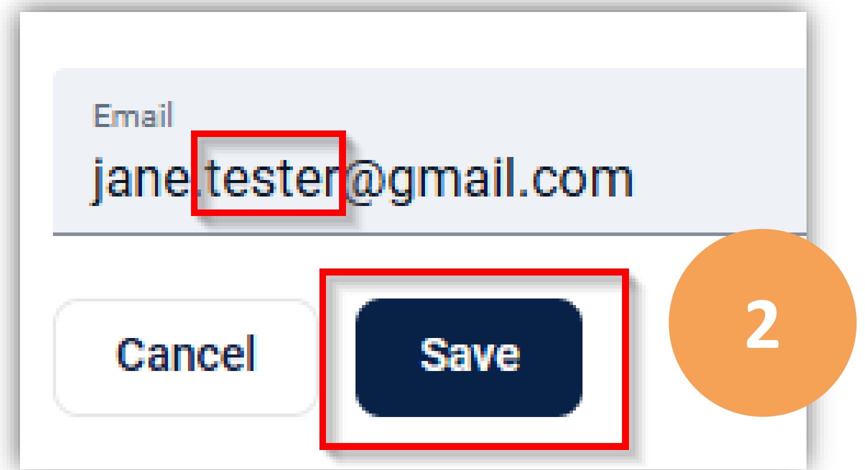
Edit a User's Email Address

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.





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		

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.

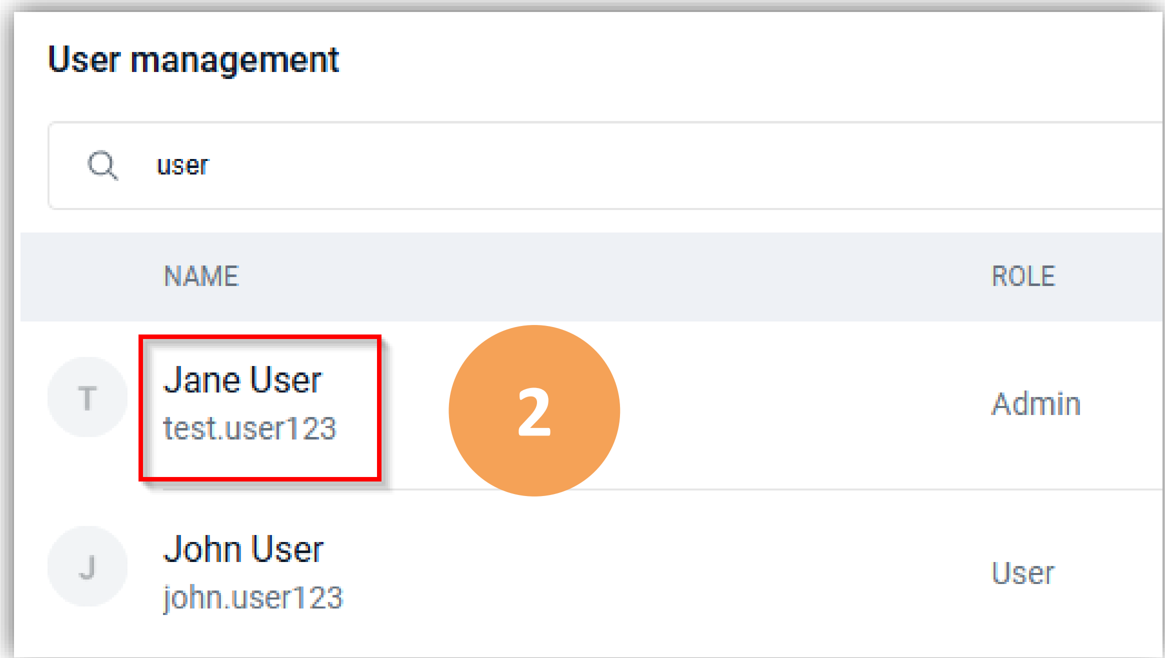
- **NOTE:** The user will *not* be able to log into their account until the hold on their account access is removed.

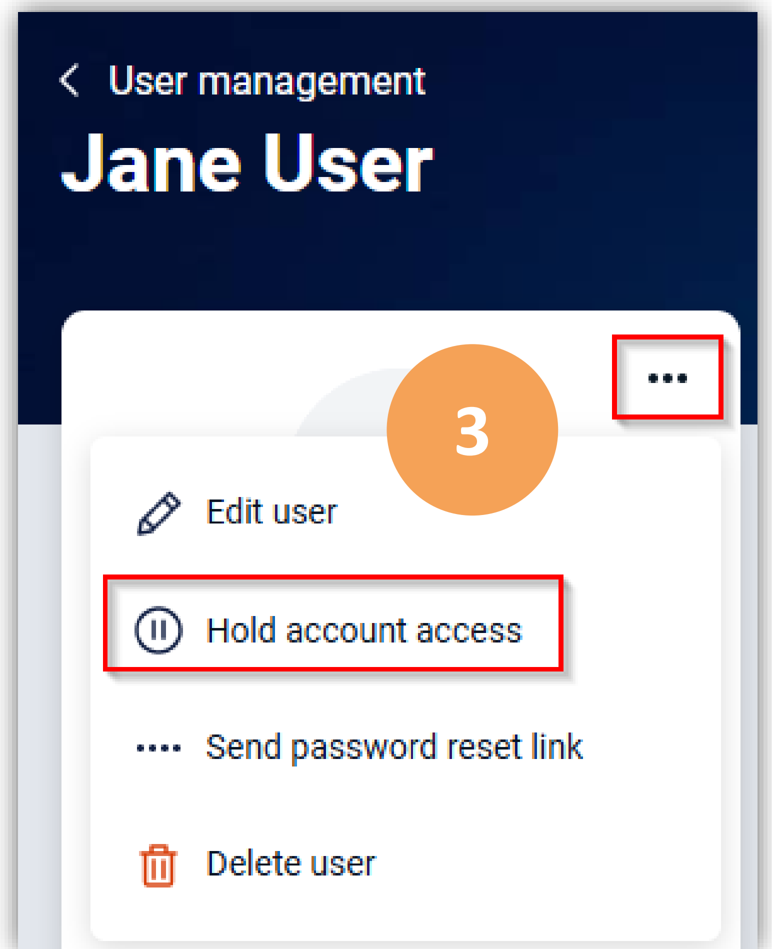
1) Click the **My profile** tab at the bottom left of your Dashboard and select **Business management**.

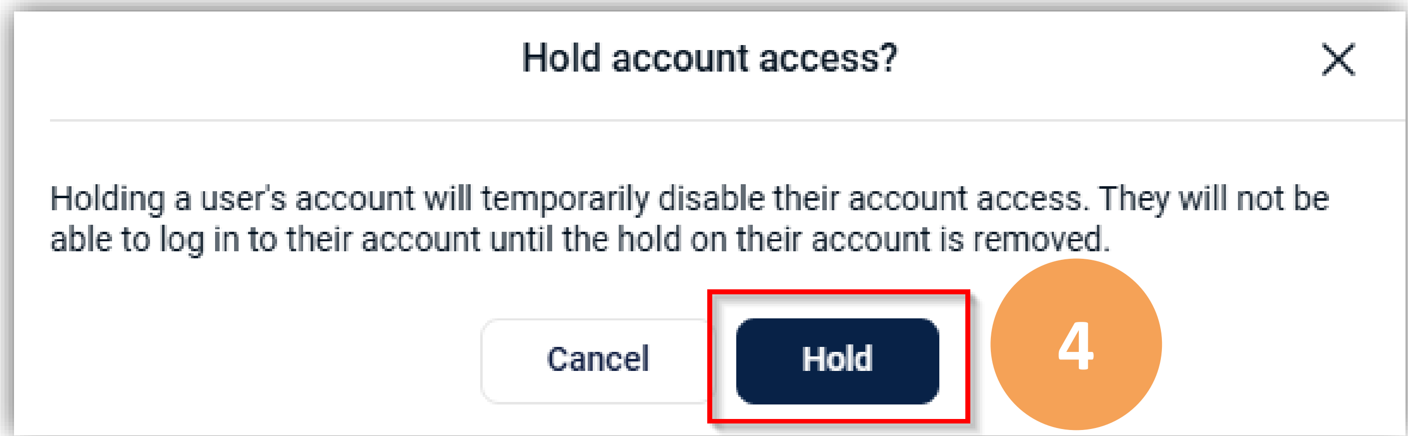
2) In the **User management** section, select the user whose account access you want to disable.

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.



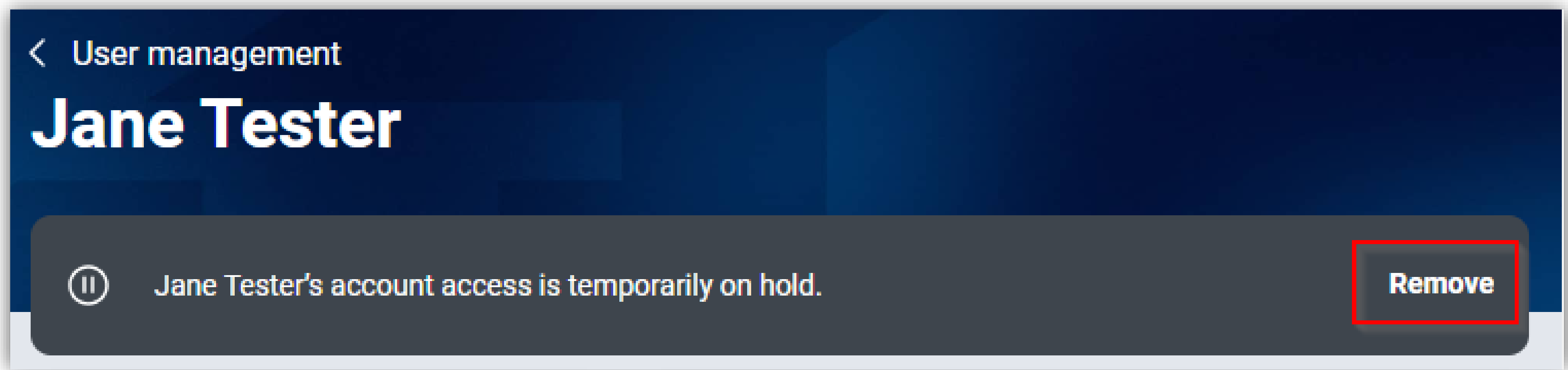




Remove Account Access Hold

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.



Send a User a Password Reset Link

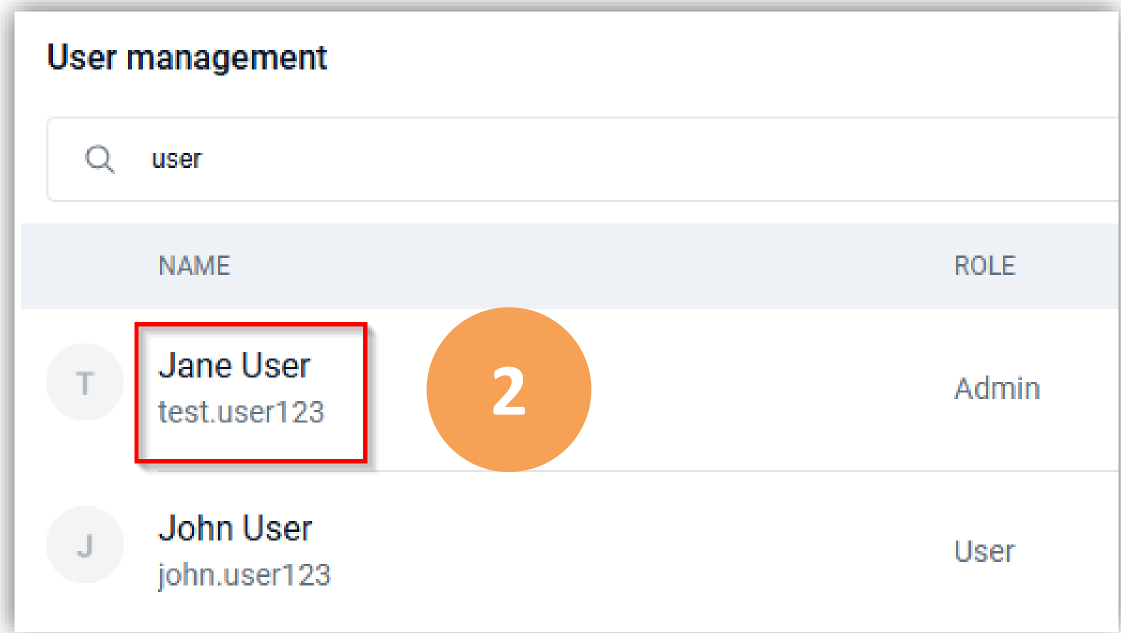
1) Click the **My profile** tab at the bottom left of your Dashboard and select **Business management**.

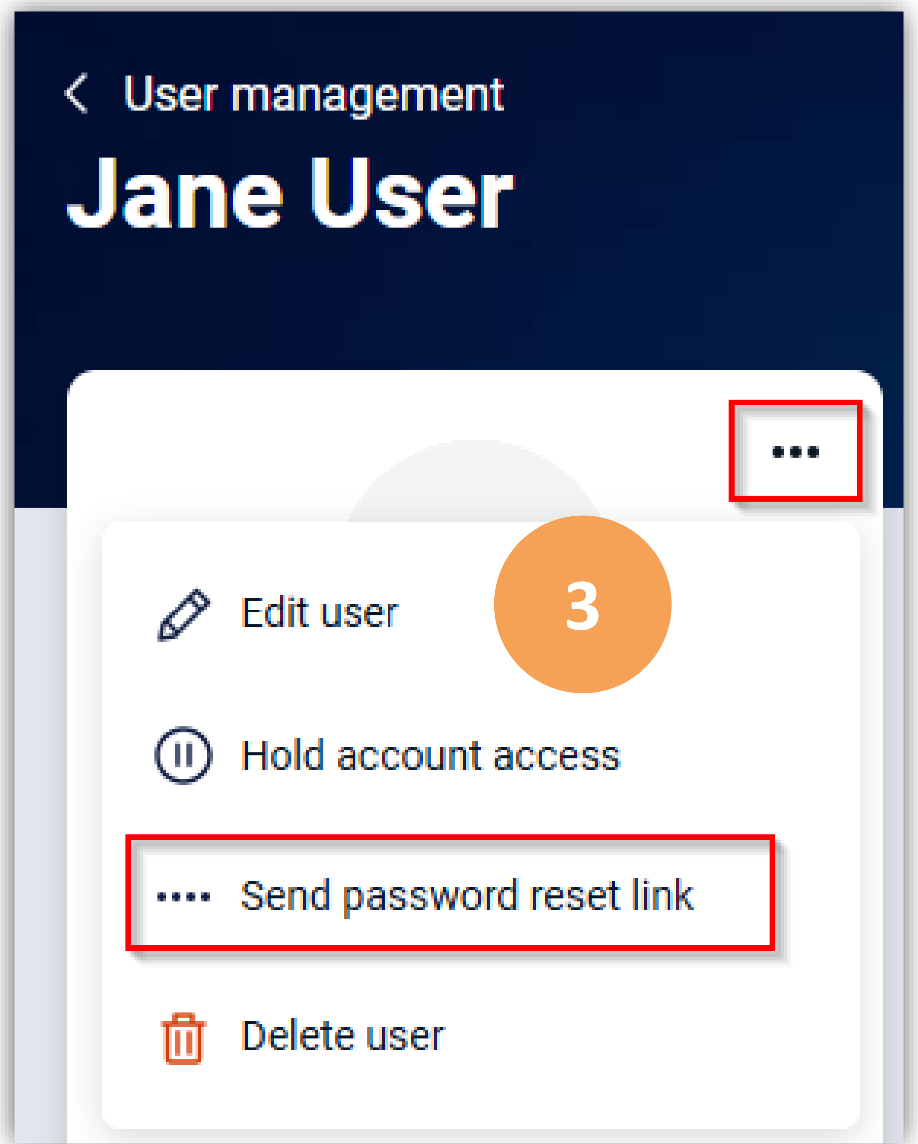
2) In the **User management** section, select the user who needs to reset their password.

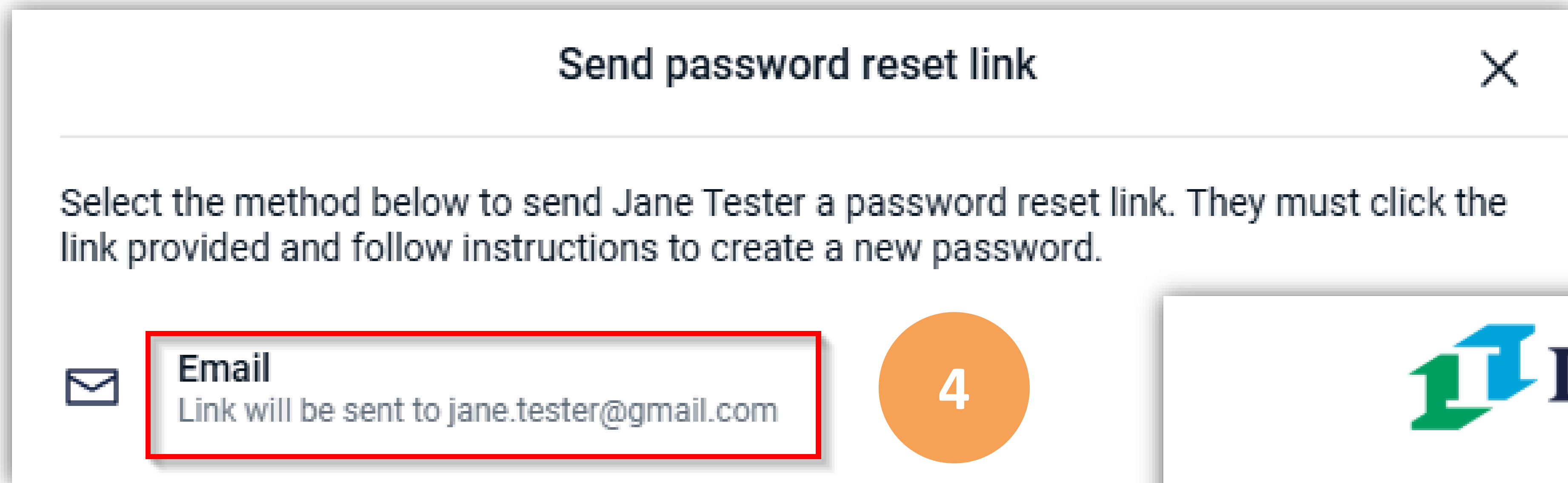
3) On the user's **User management** page, click the 3 dots at the top right of their name card and select **Send password reset link**.

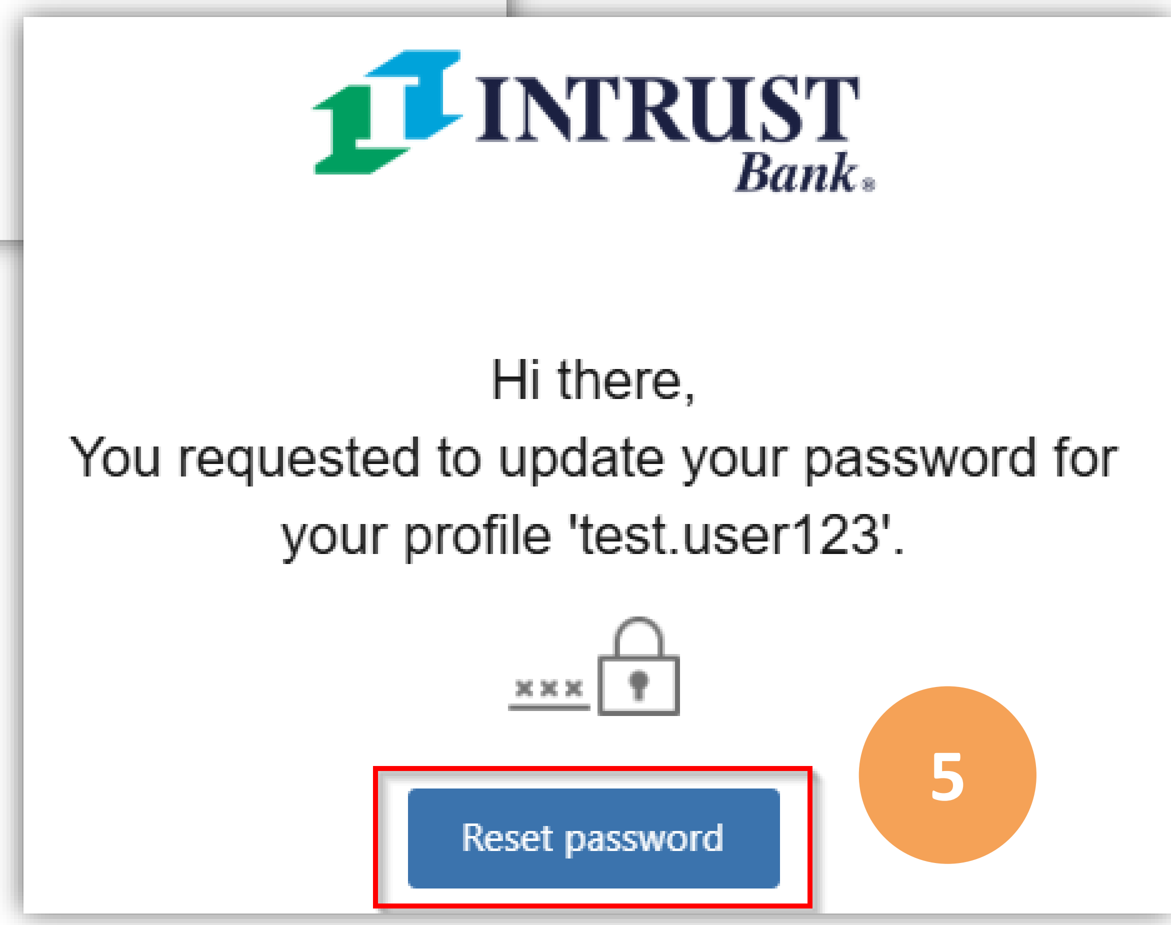
4) In the following window, click the **Email** method.

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.









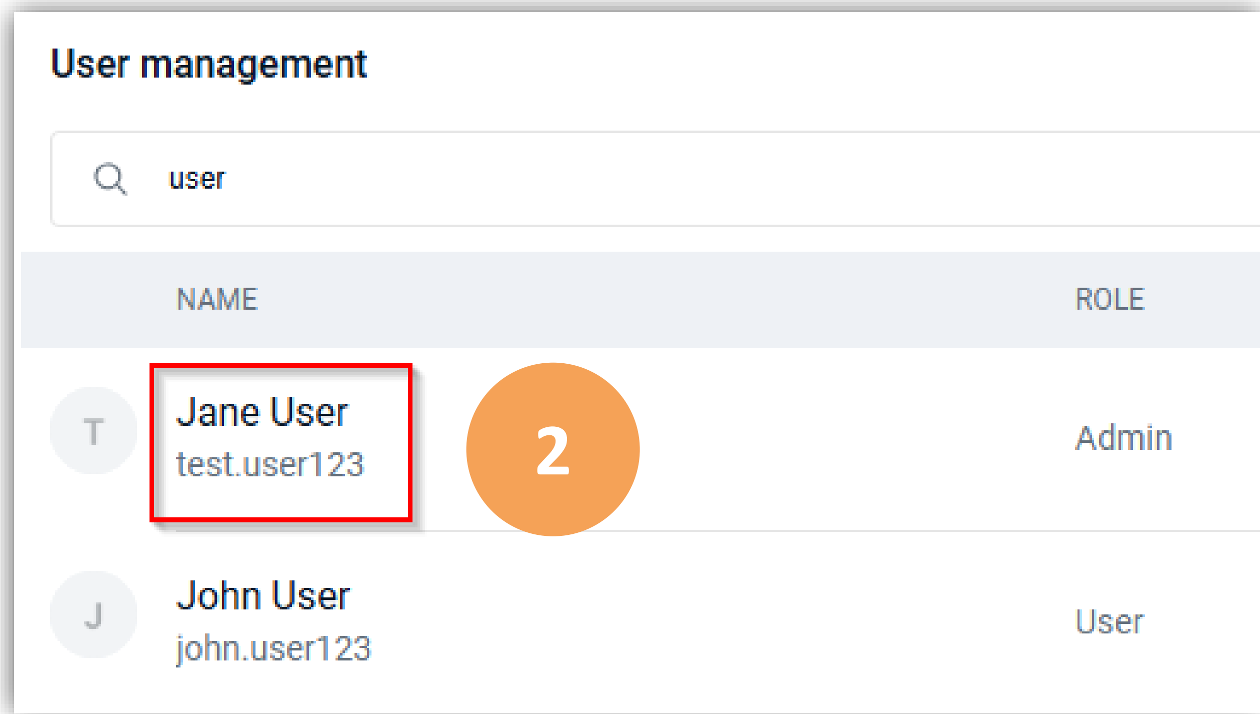
Delete a User

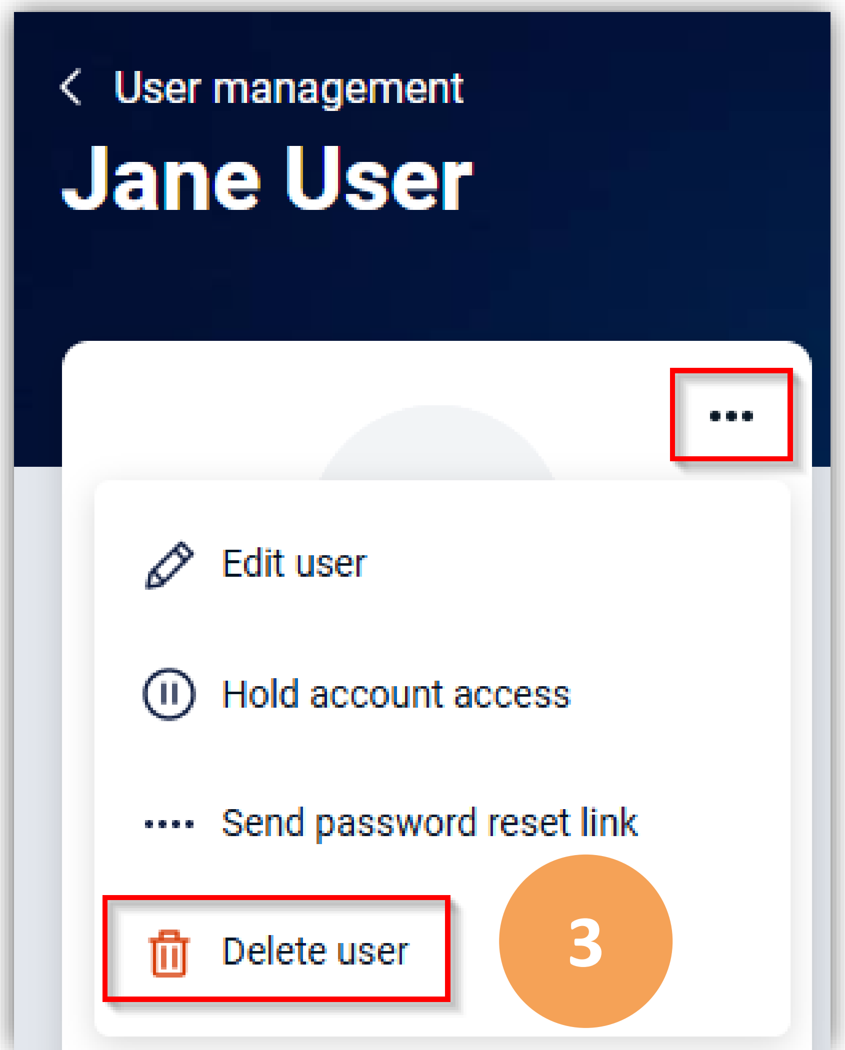
1) Click the **My profile** tab at the bottom left of your Dashboard and select **Business management**.

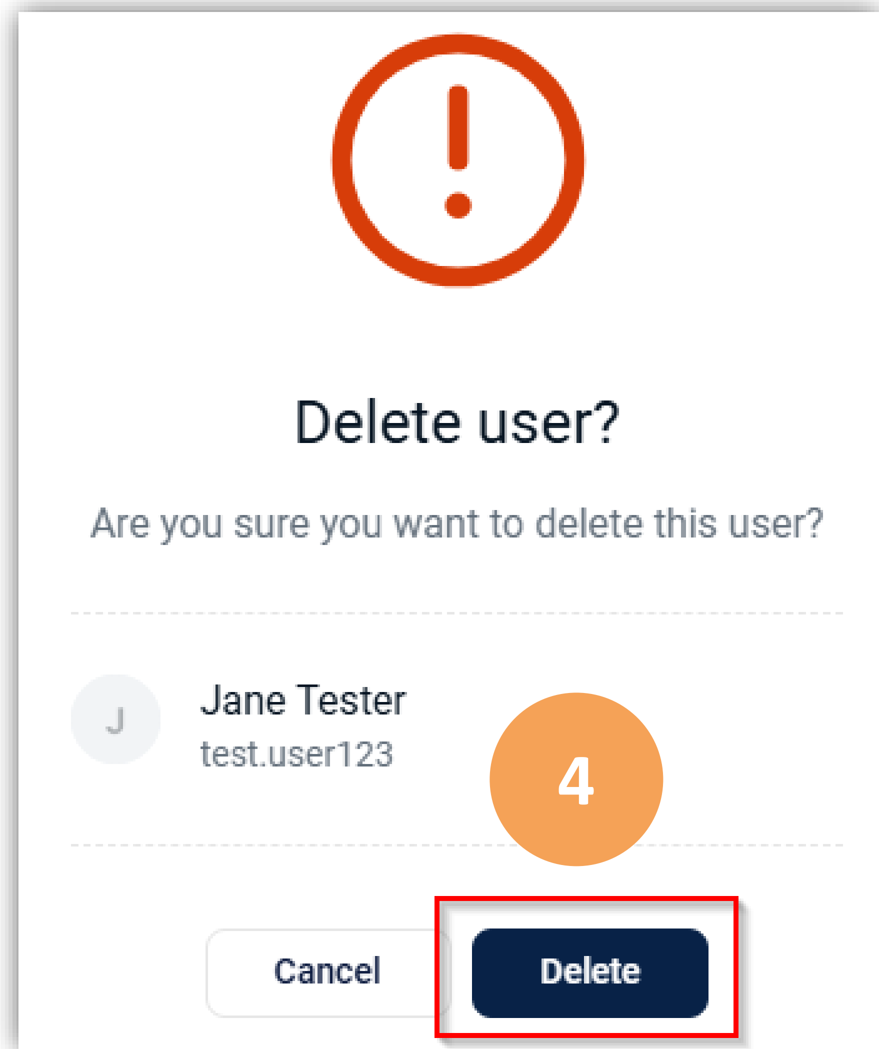
2) In the **User management** section, select the user that you want to delete.

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**.



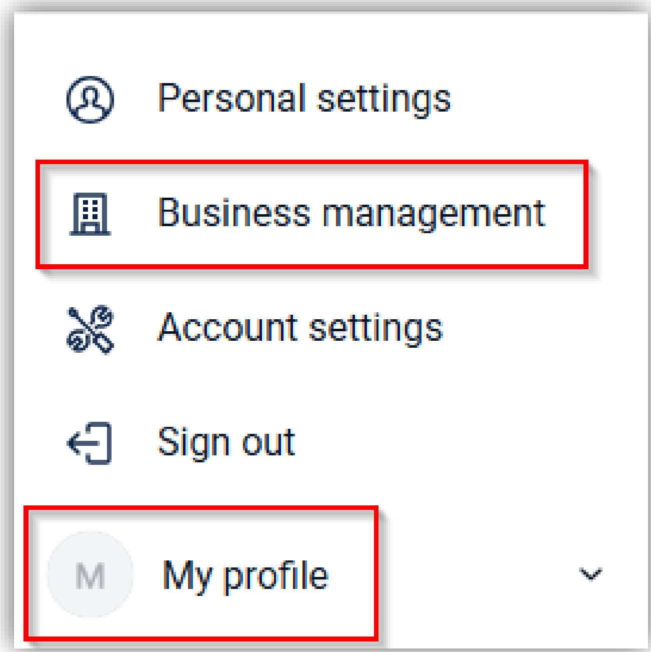


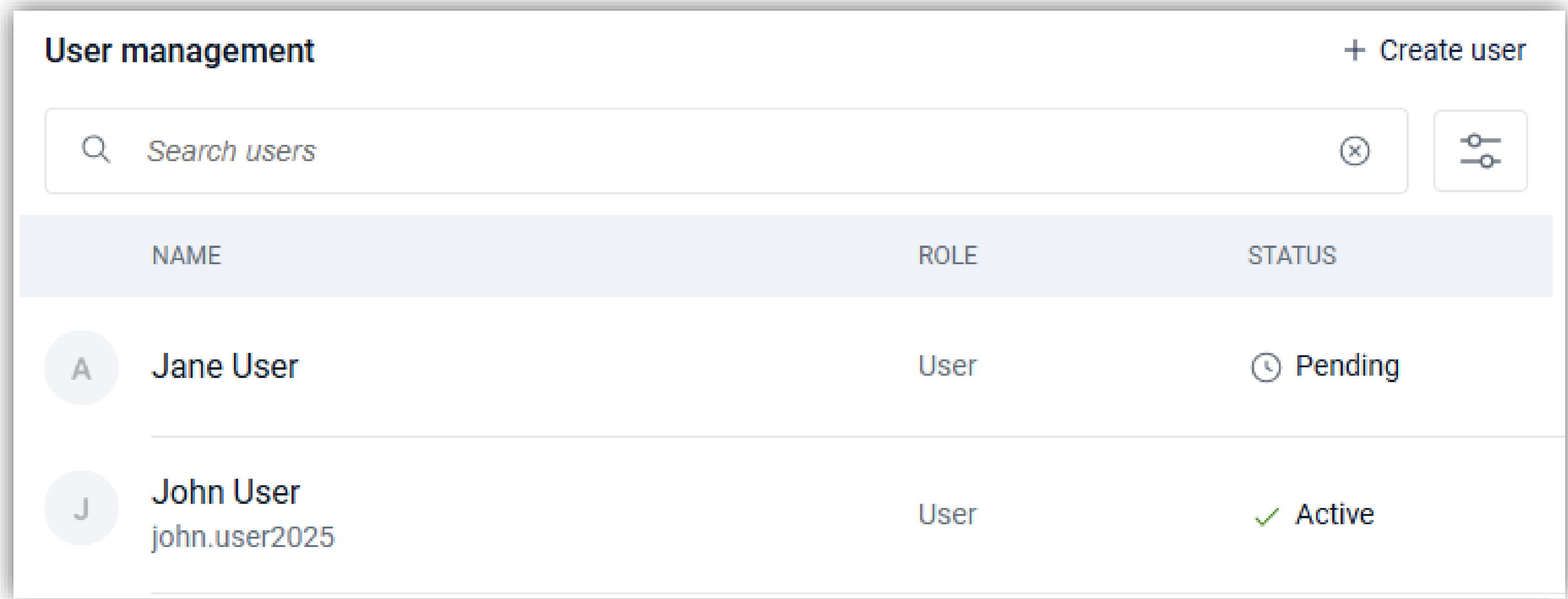


Filter User Management Page

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**.

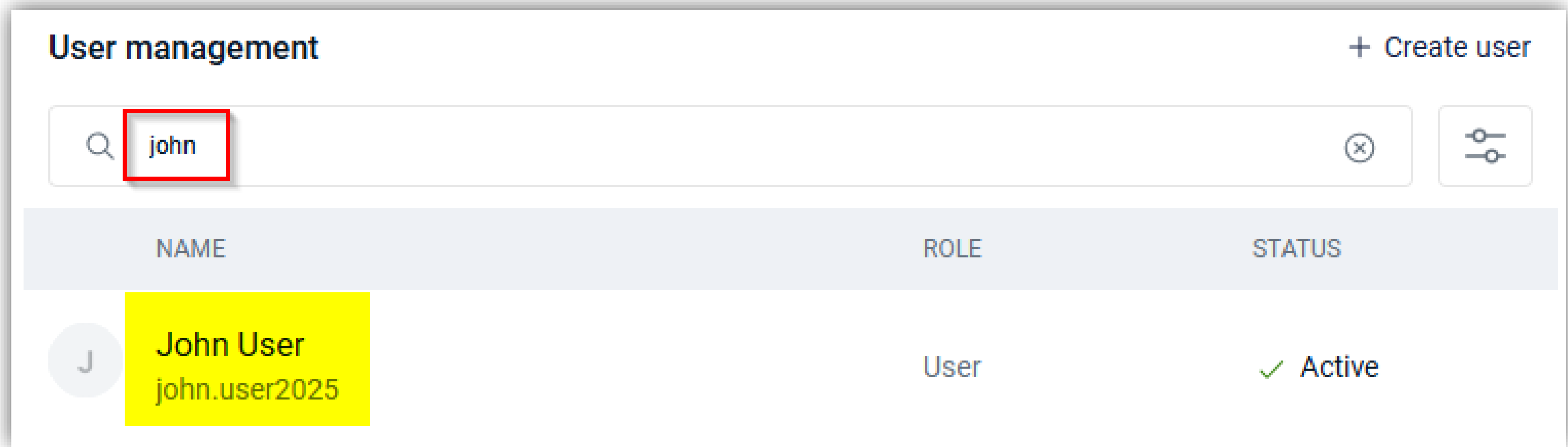
- Click the **My profile** tab at the bottom left of your Dashboard and select **Business management**.





Filter by User's Name

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

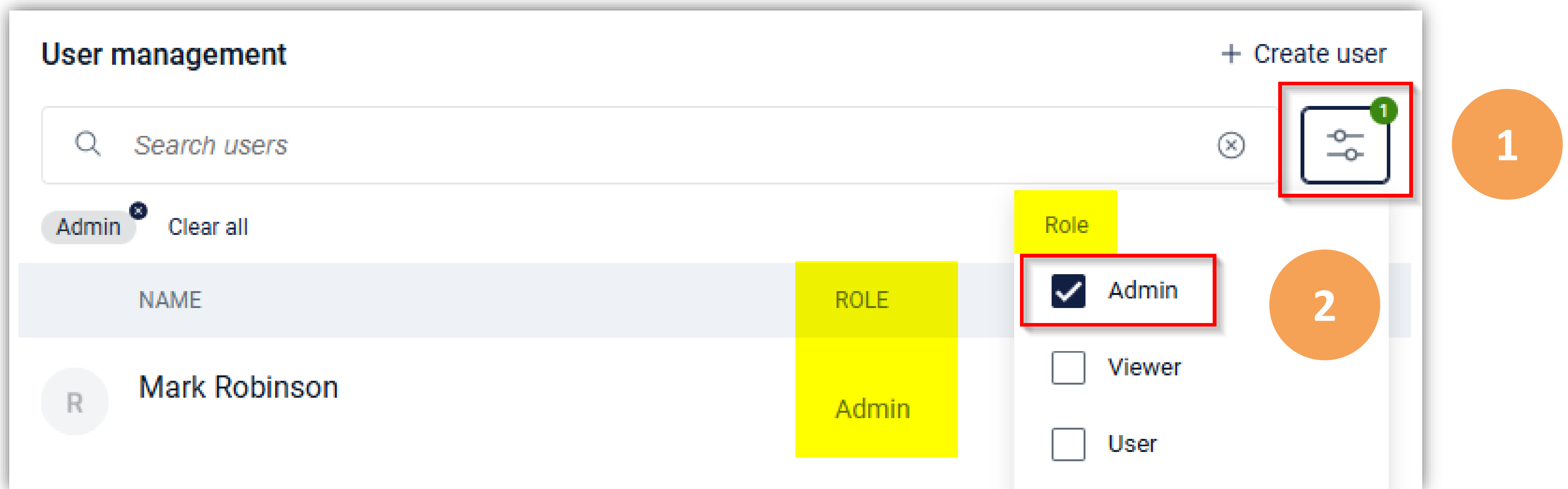


Filter by User's Role

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**.

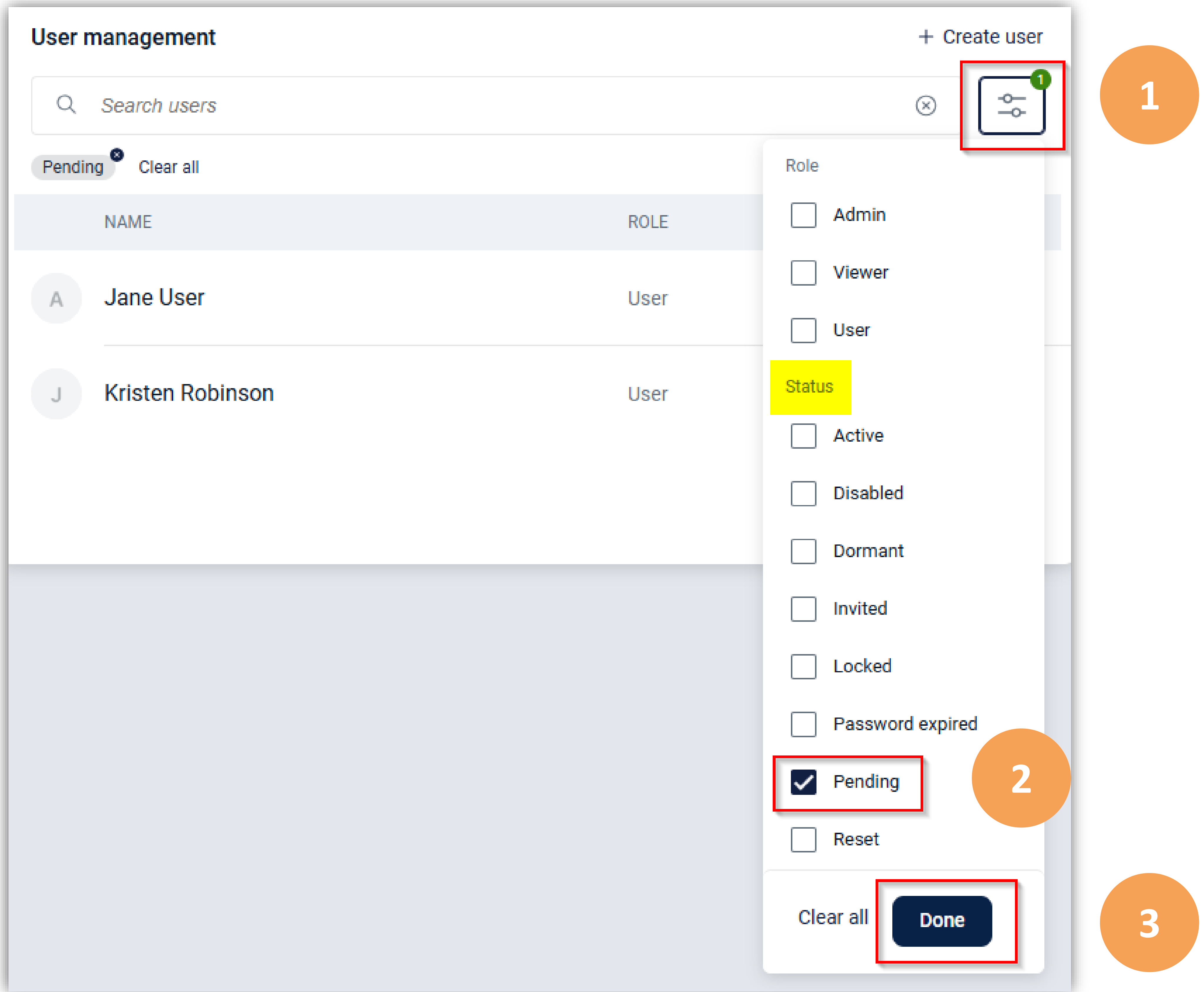


Filter by User's Status

1) Click the **Filter** icon at the top right of the **User management** section (*directly beneath + **Create user***).

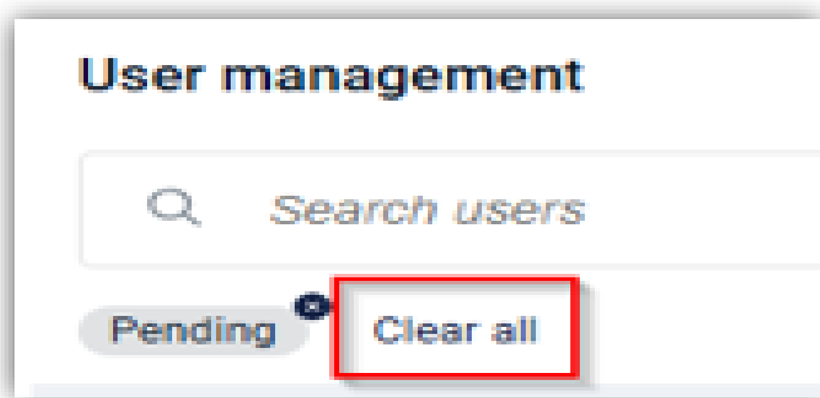
2) Select the applicable **status(es)** that you want to see.

3) Click **Done**.



Clear Filters

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



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**.