

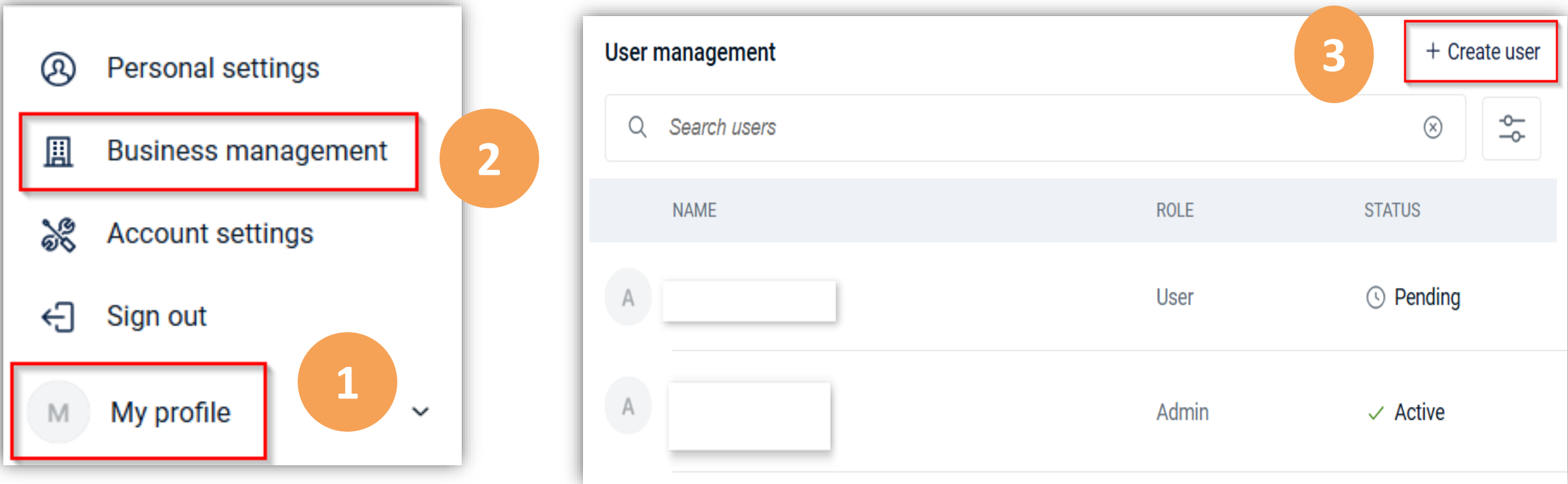
New User Configuration

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.



The screenshot shows the 'Create user' form. It has a back arrow and the title 'Create user'. The form contains the following fields: 'First name' with the value 'John' (4/20), 'Last name' with the value 'User' (4/20) labeled with a blue circle '4', 'Email' with the value 'john.user@gmail.com' (19/80), and 'User role' with the value 'User' (labeled with a blue circle '5'). At the bottom, there is a 'Create user' button (labeled with a blue circle '6') and a note: '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.'

User Roles Comparison

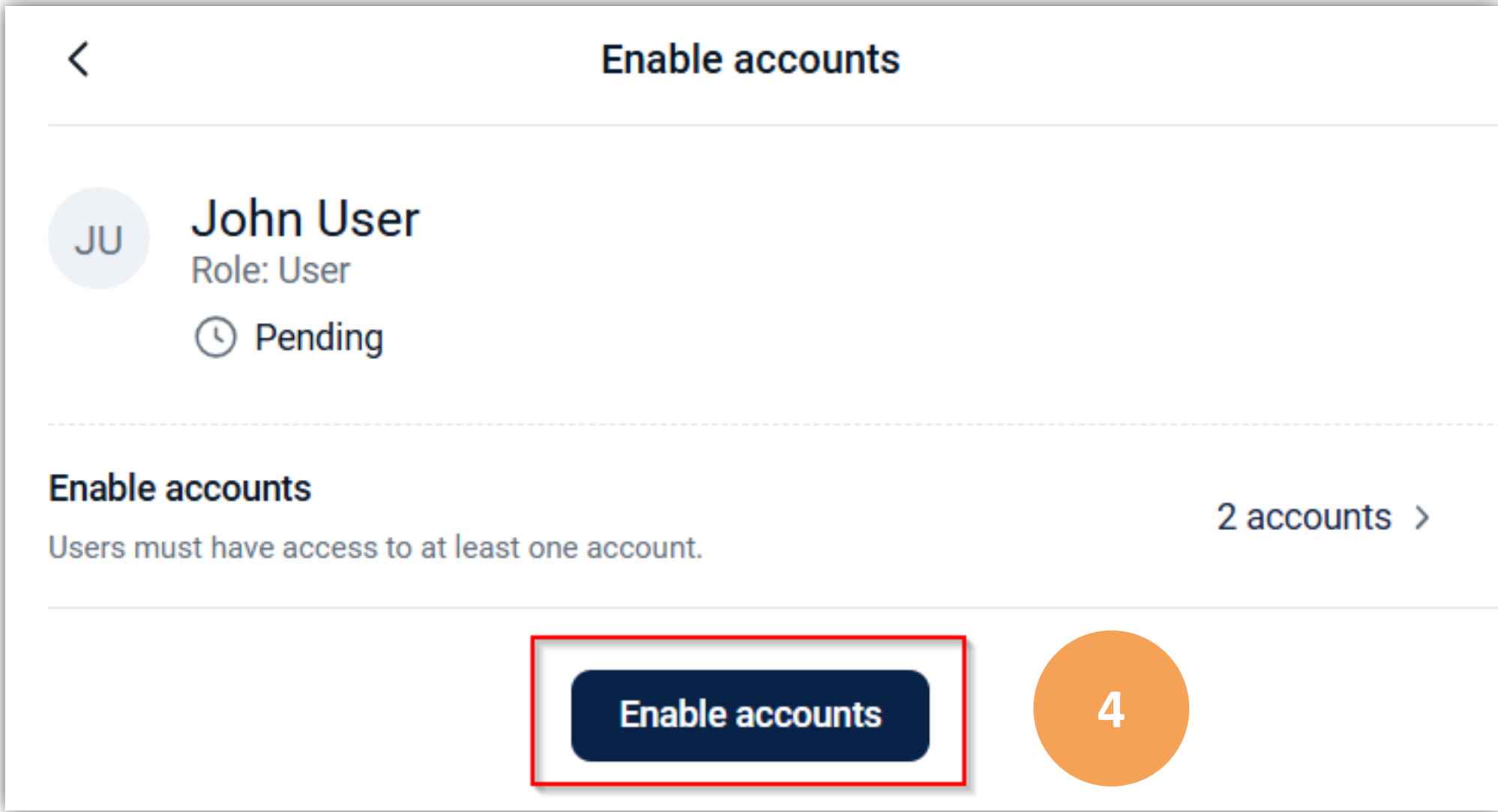
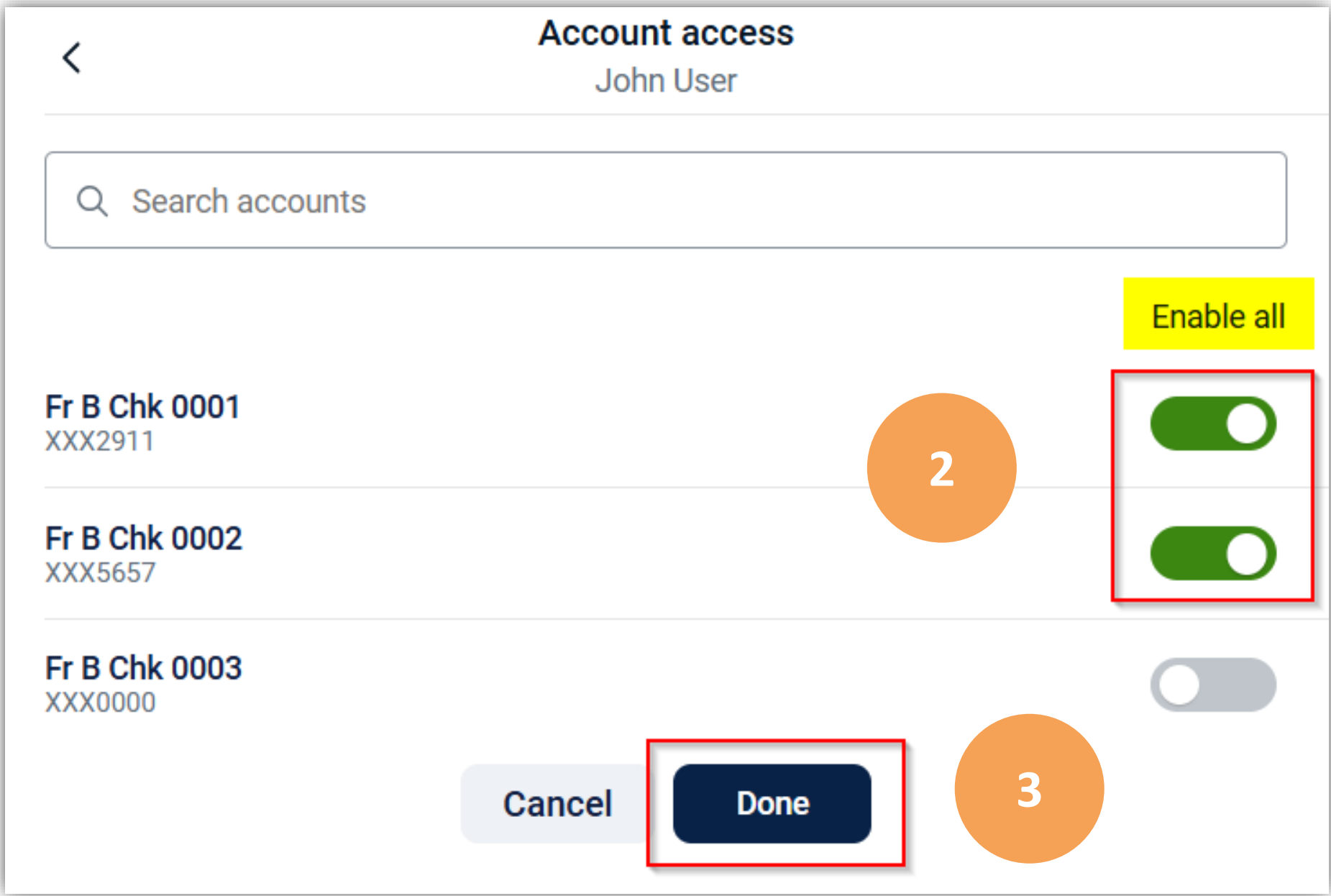
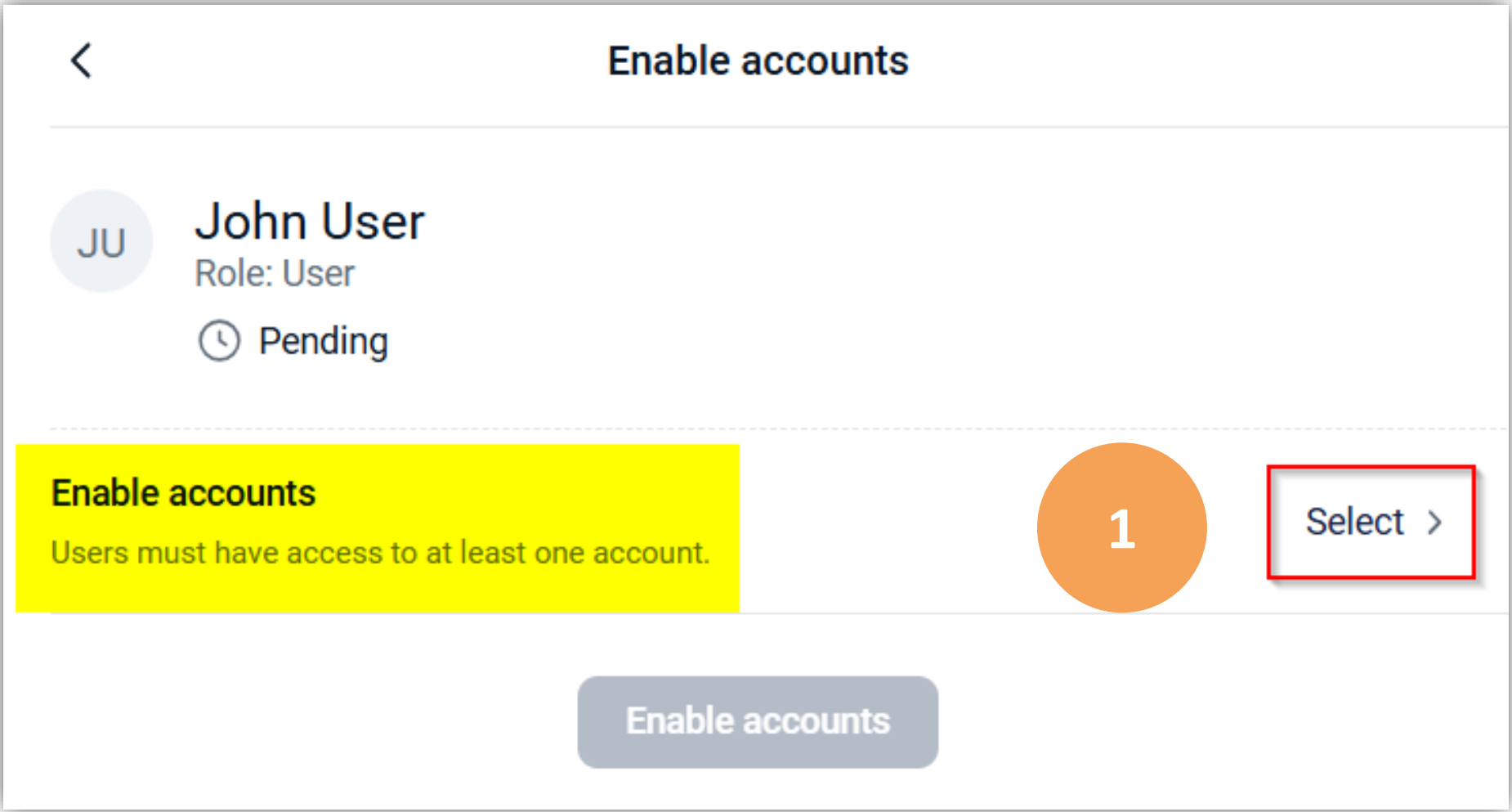
	Admin	Viewer	User
Move funds	Y	Y	Y
View users	Y	Y	
Create users	Y		
Delete users	Y		
Unlock users	Y		
Reset password	Y		
Hold account	Y		
View user profiles	Y	Y	
Edit user profiles	Y		
View user permissions	Y	Y	
Edit user permissions	Y		
View user account permissions	Y	Y	
Edit user account permissions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

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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**.



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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**.

< User management

John User

🕒

John User's account is pending. Invite them to complete set-up of their account.

J

John User

User

Pending

Permissions

Set John User's user permissions and adjust account level permissions as needed.

Set permissions

🔍 Search accounts

⚙️

✓

Success!

You successfully created an account.

JU John User

Send John User an email invitation to accept their account and create credentials.

Send email invite

Edit permissions

Done

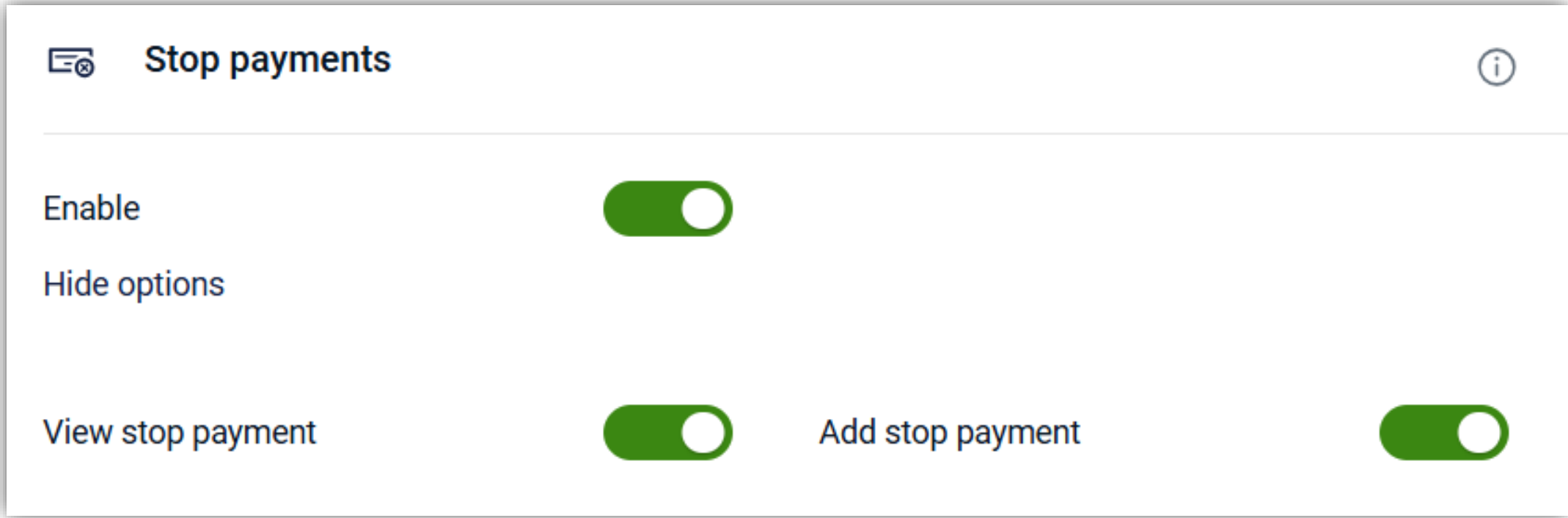
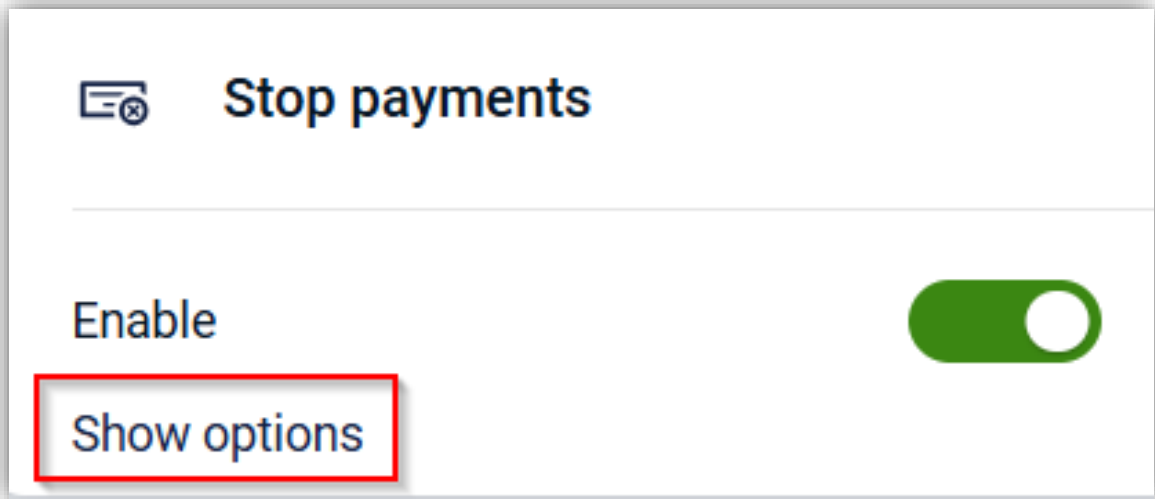
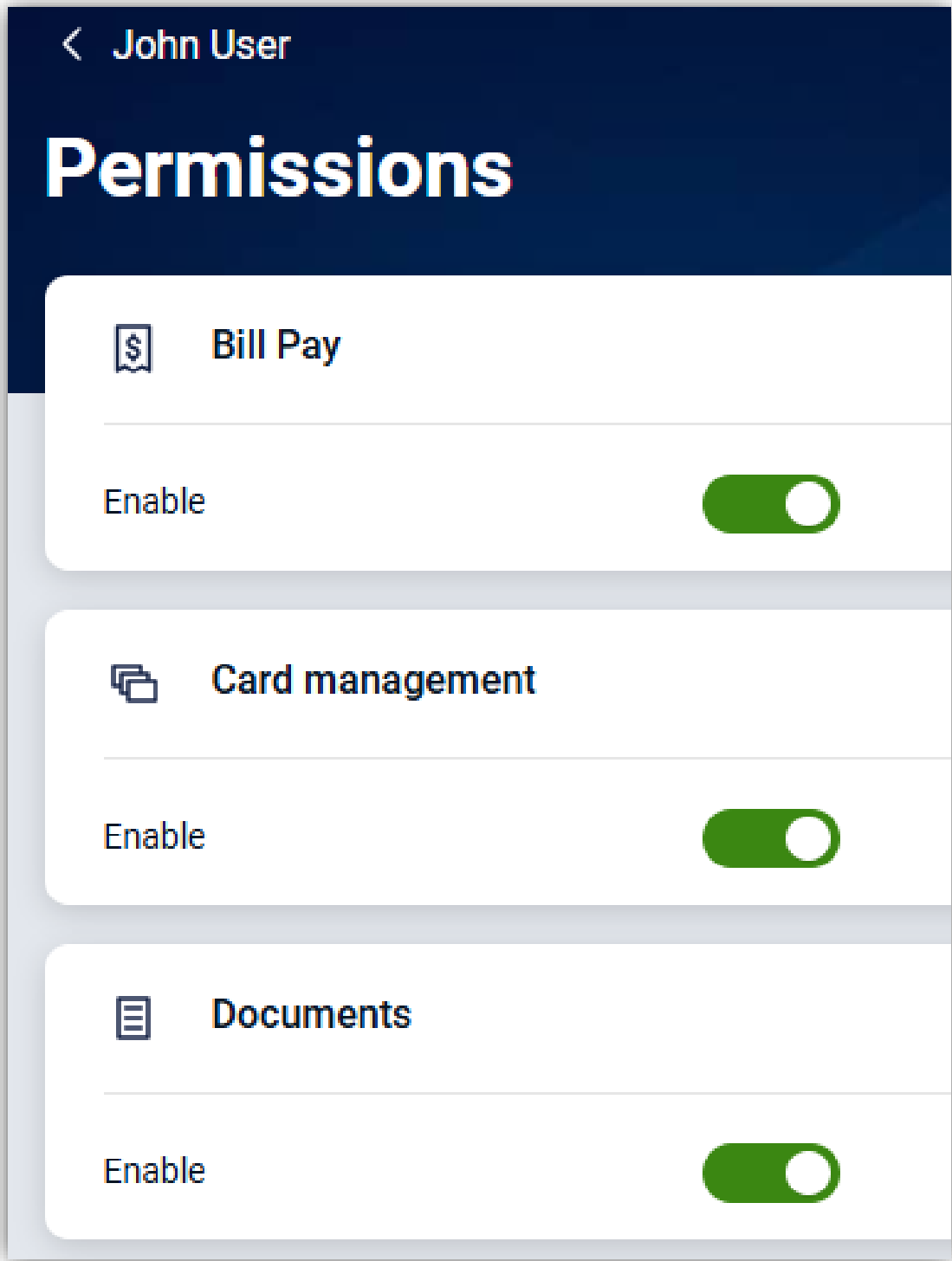
1

2

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.



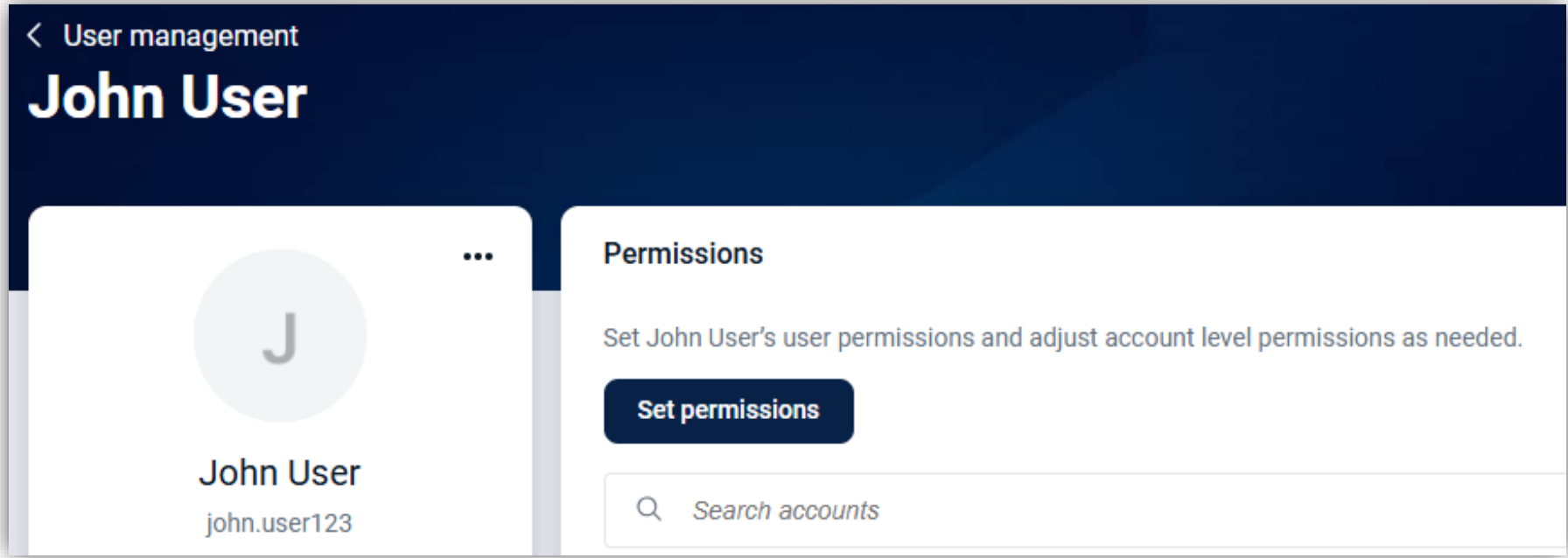
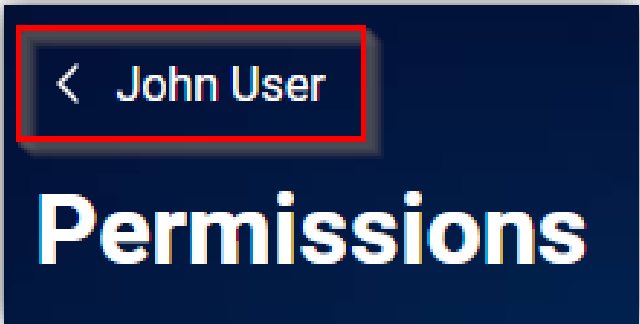
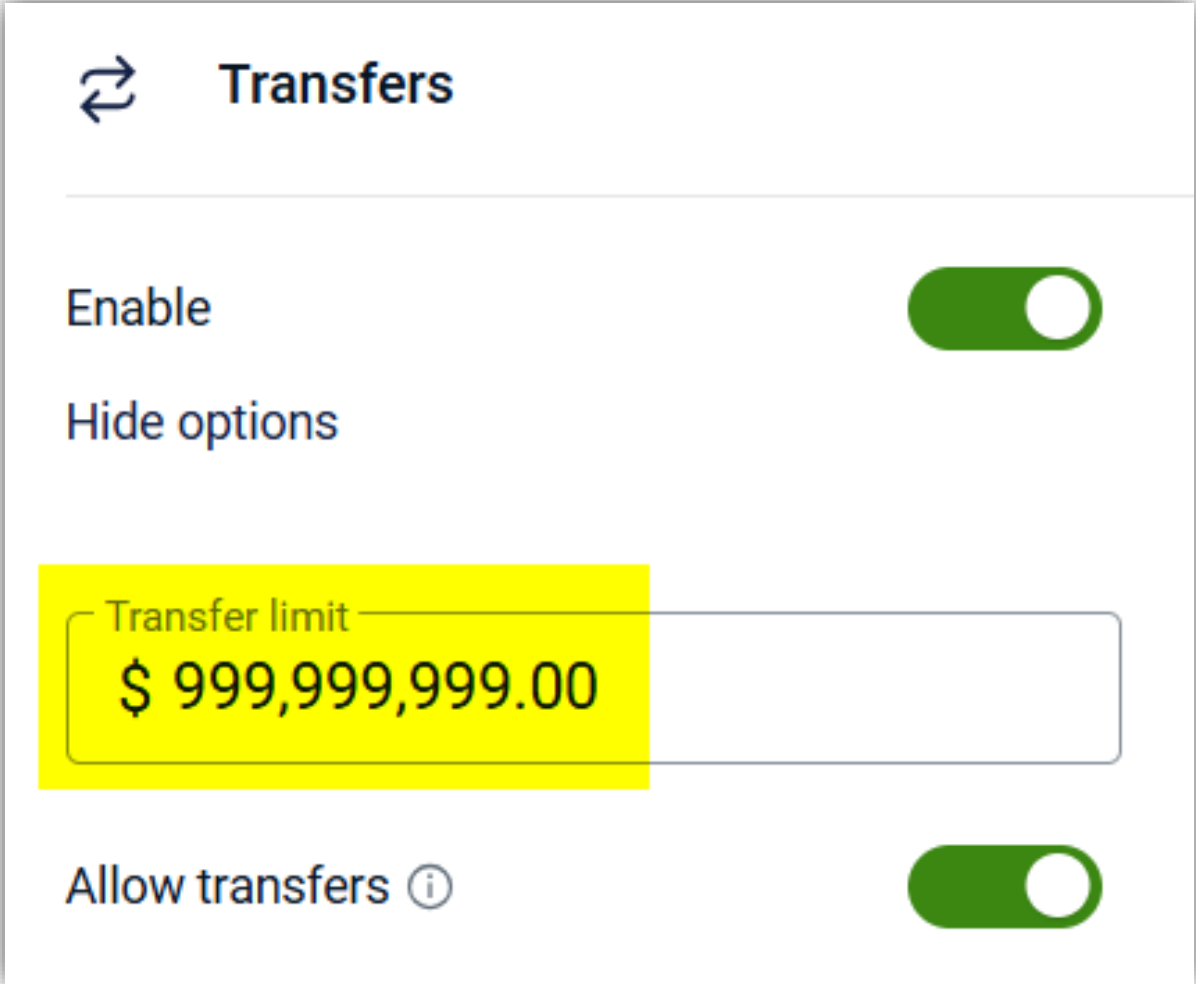
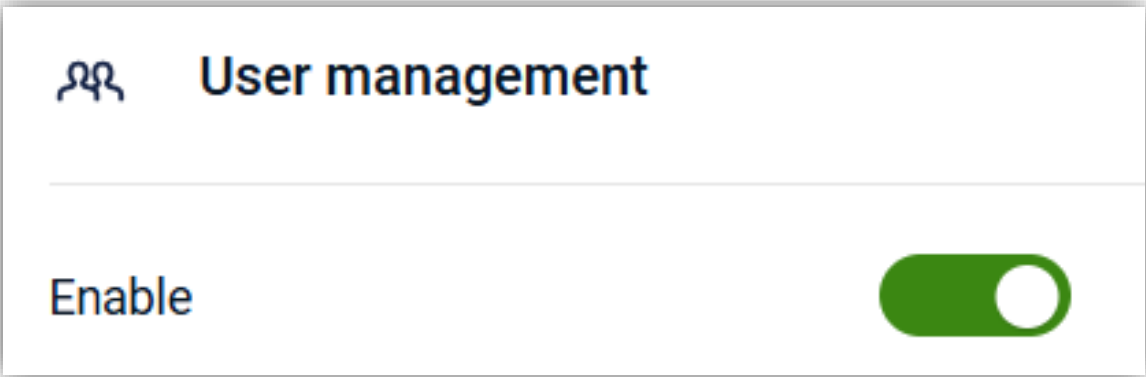
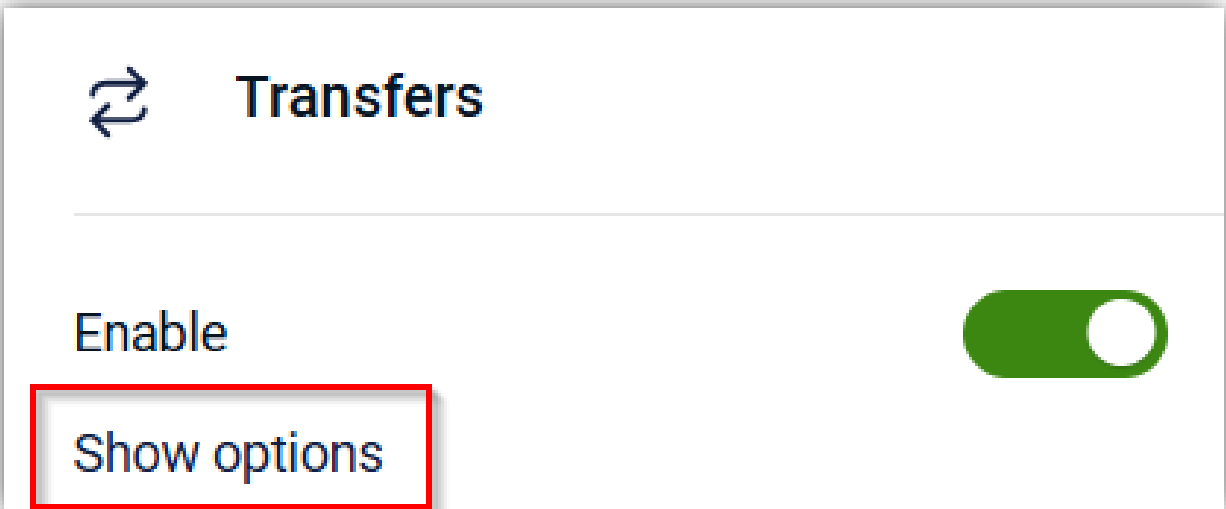
Online and Mobile Banking – New User Configuration

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.



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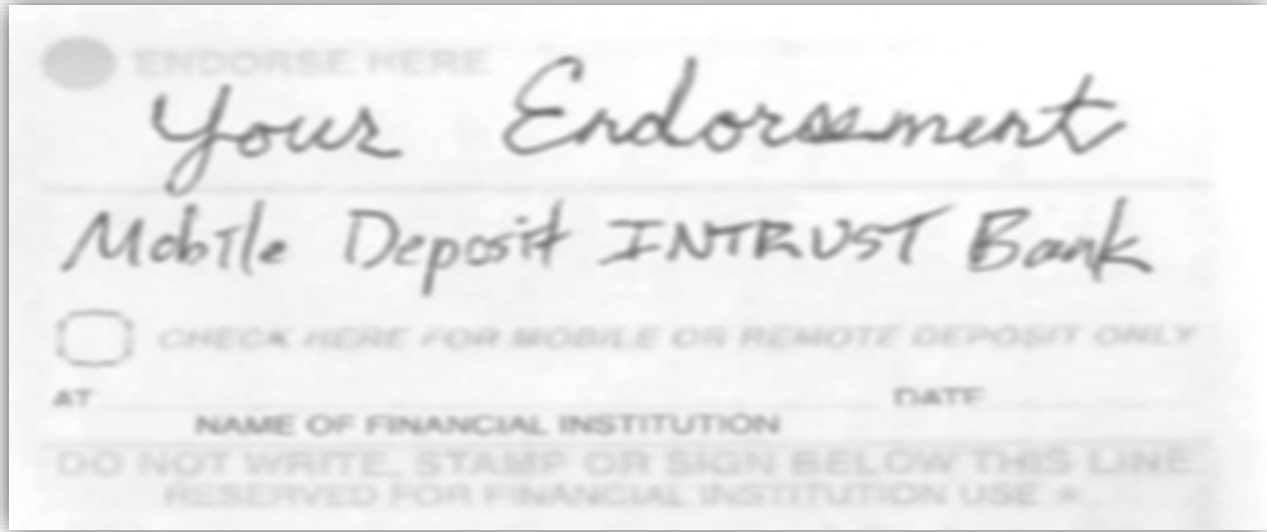
Enable Additional Services for the New User

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.**”



< User management

John User

John User's account is pending. Invite them to complete set-up of their account.

J

John User

User

Pending

Email

@outlook.com

Additional services

Manage John User's ability to view the additional services enabled by Business Testaccount.

Credit card

Documents

Manage payments

Permissions

Set John User's user permissions and adjust a

Set permissions

Search accounts

ACCOUNT

Fr B Chk 0001

XXX2911

Fr B Chk 0002

XXX5657

Fr B Chk 0003

XXX0000

INTRUST Online and Mobile Banking - Business

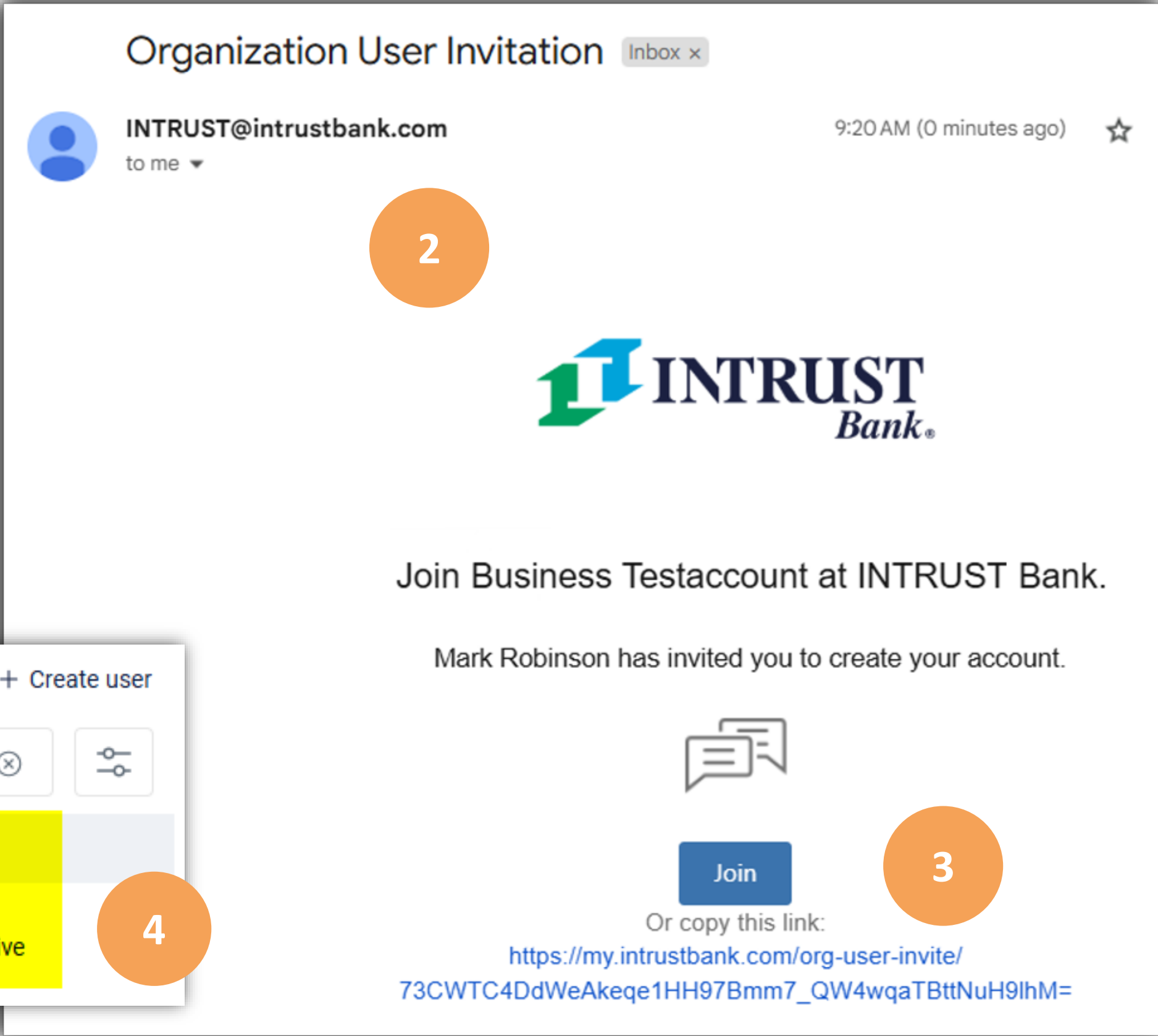
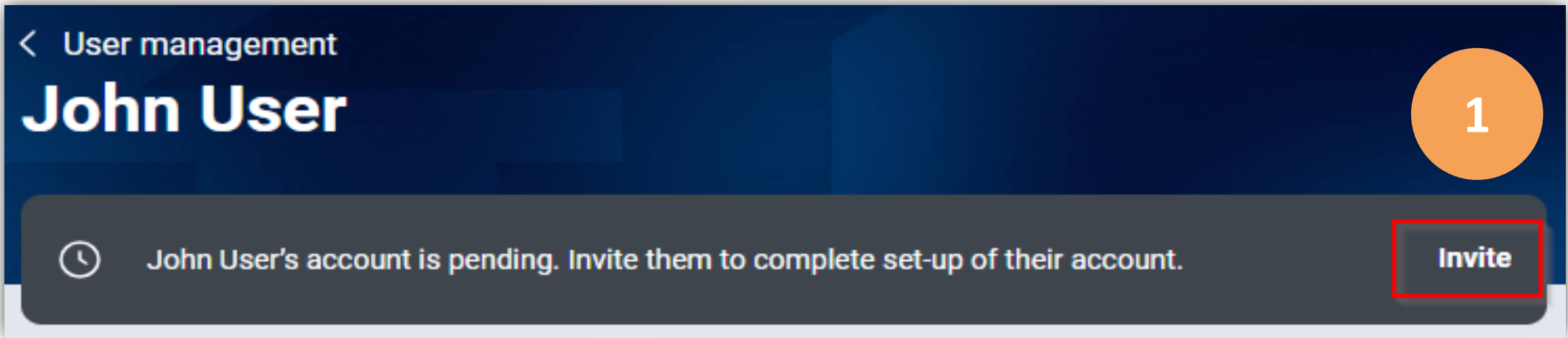
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Online and Mobile Banking – New User Configuration

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*.



User management				+ Create user
john user				⊗ ⚙
NAME	ROLE	STATUS		
J John User john.user123	User	✓ Active		4