

A man with short brown hair and a beard, wearing black-rimmed glasses, a dark blue suit jacket, a light blue striped shirt, and a dark blue tie with white polka dots. He is looking down at a laptop screen, which is partially visible in the bottom left corner. The background is a bright, out-of-focus office setting.

**Your guide to the new Business  
Online and Mobile Banking**



## What to expect from the new INTRUST Business Online and Mobile Banking.

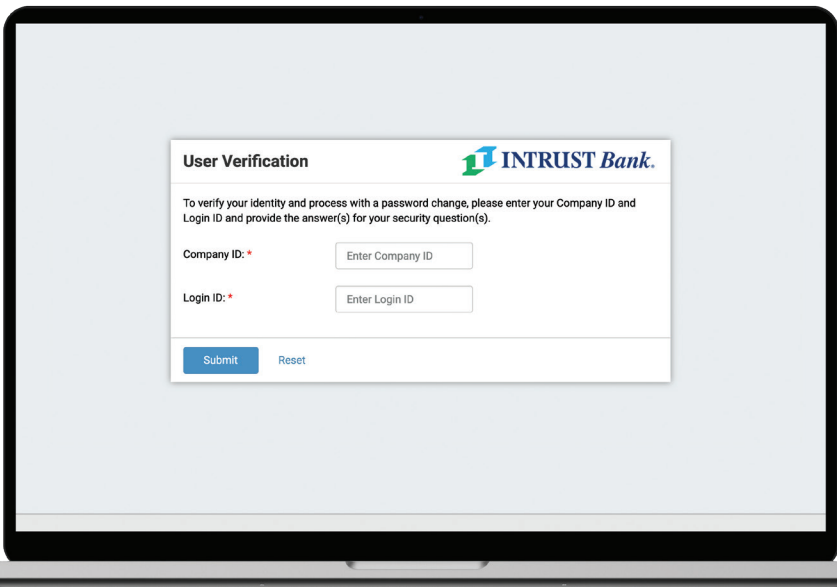
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**Business Online and Mobile Banking** are now built on one of the industry's newest digital banking platforms. You can expect a modern user experience, new features, and access to robust account data.

## STEP 1

# Logging in for the first time

- Visit [intrustbank.com](https://intrustbank.com) and click the blue **LOGIN** button in the upper-right of the screen.
- Click on the **BUSINESS** tab, and then click **LOG IN**.
- On the next screen, click **Forgot Password?**
- Enter your Company ID, Login ID and the email address you have associated with your Business Online Banking profile, and click **Submit**.
- You will receive an email from [treasuryservices@intrustbank.com](mailto:treasuryservices@intrustbank.com)
- Remember to **NEVER** share this password with anyone, including someone claiming to be from INTRUST Bank. We will **NEVER** ask you for your password.




The image shows a laptop screen displaying the INTRUST Bank User Verification login page. The page has a white background with a blue header bar containing the INTRUST Bank logo and name. Below the header, there is a section titled "User Verification" with a sub-header "To verify your identity and process with a password change, please enter your Company ID and Login ID and provide the answer(s) for your security question(s)." The form contains two input fields: "Company ID: \*" and "Login ID: \*", each with a corresponding text box. At the bottom of the form, there are two buttons: "Submit" (blue) and "Reset" (grey).




## STEP 2

# Security questions


- You will be prompted to select **three security questions** and provide answers for each. Select a question and answer that will be easy for you to remember.
- Click **Submit**.
- Review the answers to the security questions you provided and click **Confirm**.

**Security Questions** 


**i** For additional authentication purposes, please select three security questions and provide an answer for each question. You may be prompted to answer security questions at login.

Question 1: \*  

Answer: \*

Question 2: \*  

Answer: \*

Question 3: \*  

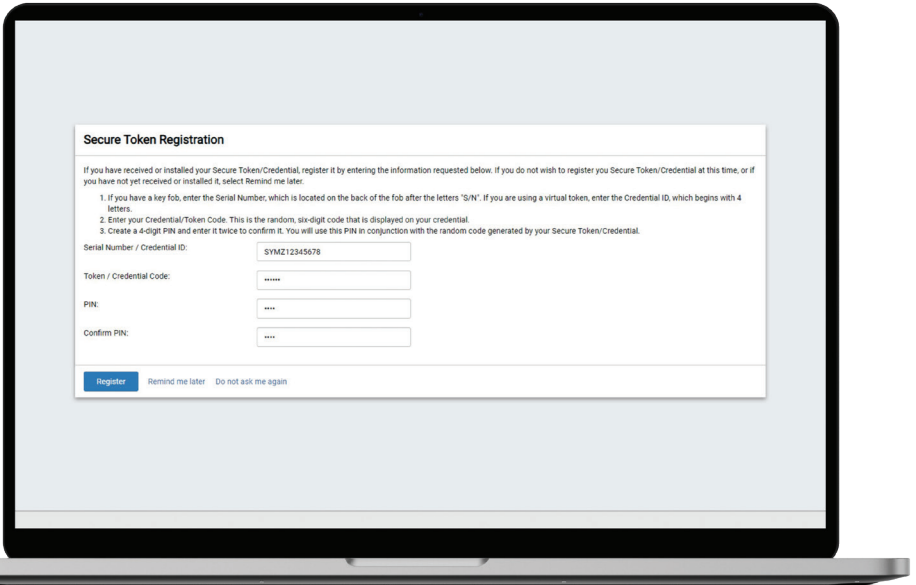
Answer: \*

## STEP 3

# Secure token registration

You will be prompted to register your secure token, which you will use when you attempt to take actions such as originating an ACH or wire payment. Your old RSA token will no longer work. Instead you will utilize a soft token, which you can access via a mobile or desktop app.

- Visit <https://vip.symantec.com> to download and install the VIP Access app to your computer or mobile device.
- Follow the directions on-screen to enter your token's **Serial Number** or **Credential ID**, the temporary Token/Credential Code and a **4-digit PIN**.
- **DO NOT** skip the Token set up during your first login. If you do, you will not be able to conduct ACH or Wire transactions or log in again.



The image shows a laptop screen displaying the 'Secure Token Registration' form. The form is titled 'Secure Token Registration' and contains the following text and fields:

**Secure Token Registration**

If you have received or installed your Secure Token/Credential, register it by entering the information requested below. If you do not wish to register your Secure Token/Credential at this time, or if you have not yet received or installed it, select Remind me later.

1. If you have a key fob, enter the Serial Number, which is located on the back of the fob after the letters 'S/N'. If you are using a virtual token, enter the Credential ID, which begins with 4 letters.
2. Enter your Credential/Token Code. This is the random, six-digit code that is displayed on your credential.
3. Create a 4-digit PIN and enter it twice to confirm it. You will use this PIN in conjunction with the random code generated by your Secure Token/Credential.

Serial Number / Credential ID:

Token / Credential Code:

PIN:

Confirm PIN:

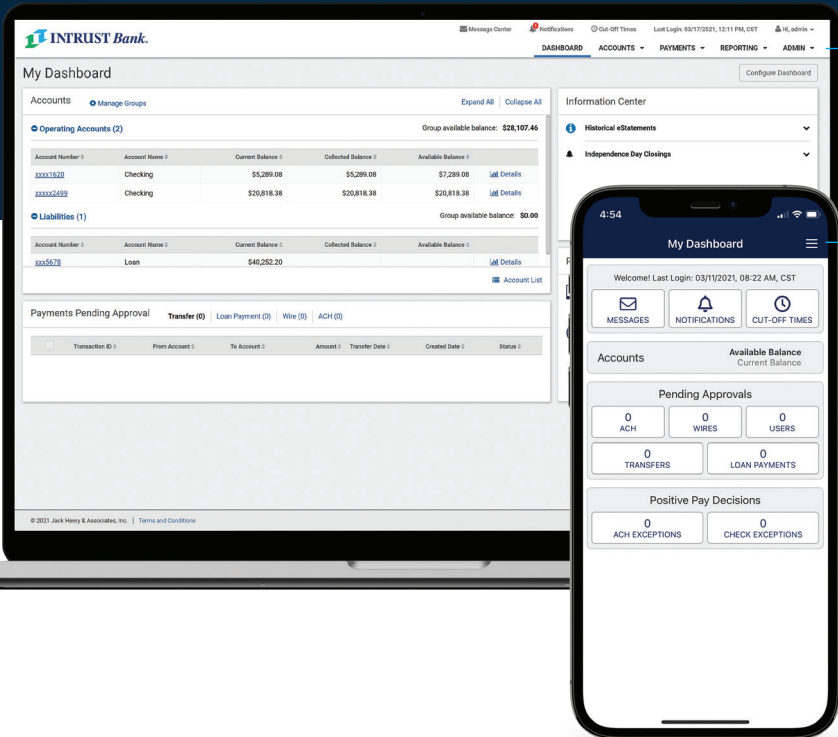
At the bottom of the form, there are three buttons: 'Register' (highlighted in blue), 'Remind me later', and 'Do not ask me again'.

- Review and accept the Terms & Conditions.
- ***You're logged in.***

# Features to review for all users.

Once logged in, you'll start at the dashboard, where you will have a quick snapshot of your account balances and can navigate to other tools.

Navigation can be found on the upper-right side of the screen in online banking, or by tapping the menu icon at the upper-right side of the screen in the mobile app.



## Dashboard

The dashboard is comprised of widgets that can be added, rearranged or removed in whichever way helps you manage your accounts most efficiently. Widgets offer both helpful information and tools to take quick action on your accounts, such as approving ACH payments or initiating a transfer. If you do not have access to something you believe you should, contact your company administrator.

- To customize your dashboard, select **Configure Dashboard**.
- When you first log in, no accounts will be listed in the Accounts widget. To add accounts to the widget, select **Manage Groups**.

The screenshot shows the INTRUST Bank dashboard. At the top, there is a navigation bar with 'Message Center', 'Notifications', 'Log Off Times', and 'Last Login: 03/17/2021, 12:11 PM, CST'. Below this is a secondary navigation bar with 'DASHBOARD', 'ACCOUNTS', 'PAYMENTS', 'REPORTING', and 'ADMIN'. The main content area is titled 'My Dashboard' and includes a 'Configure Dashboard' button. The 'Accounts' section is expanded to show 'Operating Accounts (2)' and 'Liabilities (1)'. The 'Operating Accounts' table has columns for Account Number, Account Name, Current Balance, Collected Balance, and Available Balance. The 'Liabilities' table has columns for Account Number, Account Name, Current Balance, Collected Balance, and Available Balance. There is also an 'Information Center' section with 'Historical Statements' and 'Independence Day Closings' options, and a 'Resource' section with a 'Welcome to the New Business Online Banking' message. A blue double arrow points to the 'Configure Dashboard' button, and another blue double arrow points to the 'Manage Groups' link in the Accounts section.

## Accounts

- To view a list of all your accounts, from the main menu, select **Accounts**, then **Account list**. Your accounts are grouped by account type.
- Review the list of accounts to confirm the expected accounts are displayed.
- If you believe any accounts are missing, contact your company administrator or INTRUST Treasury Services.

The screenshot shows the INTRUST Bank 'Account List' page. At the top, there is a navigation bar with 'Message Center', 'Notifications', 'Log Off Times', and 'Last Login: 03/17/2021, 12:07 PM, CST'. Below this is a secondary navigation bar with 'DASHBOARD', 'ACCOUNTS', 'PAYMENTS', 'REPORTING', and 'ADMIN'. The main content area is titled 'Account List' and includes a 'Download' and 'Print' button. The page shows a summary of 'Deposits' (\$38,509.95) and 'Loans' (\$40,252.20). Below this is a search bar and a 'Refresh Balances' button. The main table has columns for Account Number, Account Name, Status, Current Balance, Collected Balance, Available Balance, and Actions. The table lists three accounts: a Savings account (xxxx0123), a Checking account (xxxx1620), and another Checking account (xxxx2492). A blue double arrow points to the 'ACCOUNTS' menu item in the navigation bar.

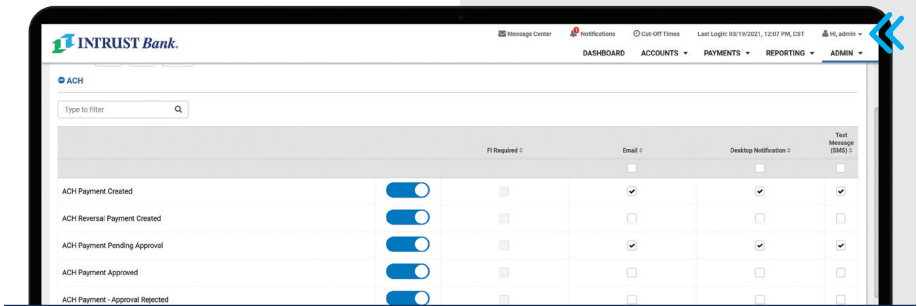
## Notifications

- To review available notifications and enable them, click the **user icon** in the upper-right of the screen and then **Notification Setup**.



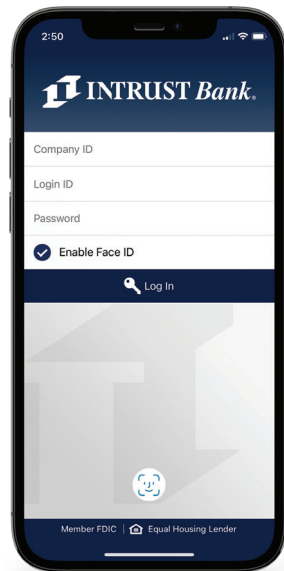
### ACTION REQUIRED:

Any notifications that you had previously created will not transfer to the new platform, and you will need to set up new notifications.



## Mobile App

- Once you have logged in to the new INTRUST Business Online Banking, you will have access to the corresponding mobile app.
- **After June 11**, if you have the current INTRUST Business Banking app on your phone, **delete it**.
- After logging in to online banking on **June 14**, visit the **Apple App Store** or **Google Play** and search for **INTRUST Bank Business**.
- Once you have located the app in the store, you can **install** it on your device.
- **Log in with the new credentials** you set up for online banking.



Use your smartphone's camera to scan the code to download the app on your Apple® or Android™ phone.





# Features to review for administrators

## User Management

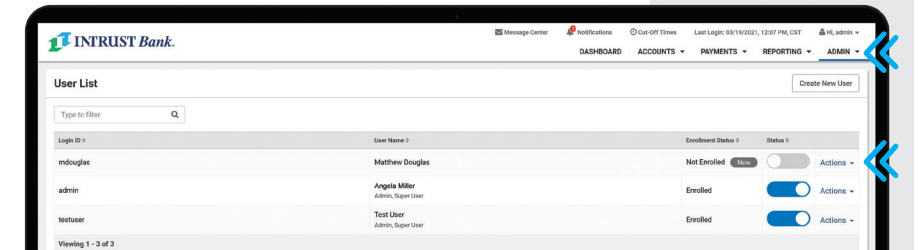
If you manage additional business online banking users, we recommend reviewing their settings. Use the User Setup Guide you previously downloaded from the previous version of online banking as a reference.

- From the main menu, select **ADMIN > User List**.
- For each user, select **Actions > View User**.
- Use the menu on the left to review their access, entitlements and limits.
- If you need to edit any of these values, select **Edit**.



### **ACTION REQUIRED:**

Review your list of users and their entitlements and limits.

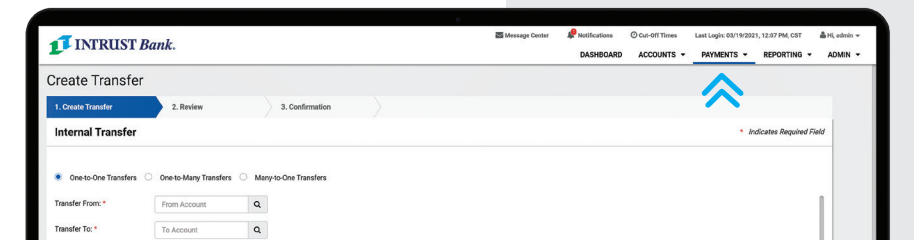


## Transfers

- From the main menu, select **Payments** and then **Create Transfer** under **Transfers** to create a new one-time or recurring transfer.



**ACTION REQUIRED:** If you previously scheduled transfers to occur **after June 11, 2021**, you will need to recreate those.



# Further features for administrators

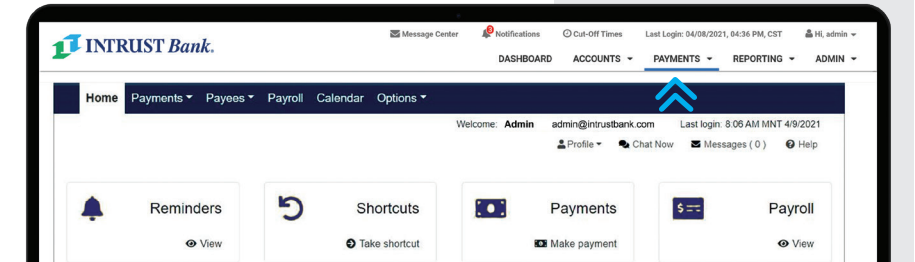
Depending on the payment services for which you have contracted, administrators may also need to review and take action on the following items:

## Bill Pay

- Your Bill Pay payees, as well as your scheduled one-time and recurring bill payments, will have transferred over to the new platform.
- To review your payees and scheduled payments, from the main menu, select **PAYMENTS** and then **Business Bill Pay** under **Bill Pay**.



**ACTION REQUIRED:** If you were previously enrolled in any eBills, you will need to re-enroll in eBills for each vendor.

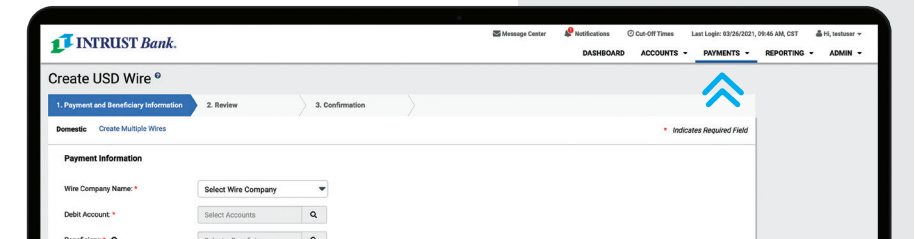


## Wires

- From the main menu, select **PAYMENTS** and then **Create USD Wire** or **Create USD Wire from Template** under **Wire** to create a new one-time or recurring wire transfer.



**ACTION REQUIRED:** If you previously scheduled wires to process **after June 11, 2021**, you will need to recreate those.



## ACH Origination

- From the main menu, select **PAYMENTS** and then **Create ACH Payment** under **ACH** to create a new one-time or recurring ACH payment manually from an ACH template or via NACHA file upload.



**ACTION REQUIRED:** If you previously scheduled ACH payments to process on or **after June 11, 2021**, you will need to recreate those.

INTRUST Bank

Message Center Notifications Out-Of-Times Last Login: 03/19/2021, 12:57 PM, CST HJ Admin

DASHBOARD ACCOUNTS PAYMENTS REPORTING ADMIN

### Create ACH Payment

1. Create Payment 2. Manage Recipients 3. Review 4. Confirmation

Manual Entry  From Template  Upload NACHA File

#### Payment Header Information

\* Indicates Required Field

Payment Name: \*

ACH Company Name: \* Type to filter

ACH Company ID:

SEC Code:

Entry Description: \*

Discretionary Data:

Restrict Payment

Frequency: \* One Time

Effective Date: \* 03/22/2021

Add Recipients Cancel



## We're here to help.

If you have any questions, contact Treasury Services  
at [treasuryservices@intrustbank.com](mailto:treasuryservices@intrustbank.com) or by phone at **800-905-6630**.