



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



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

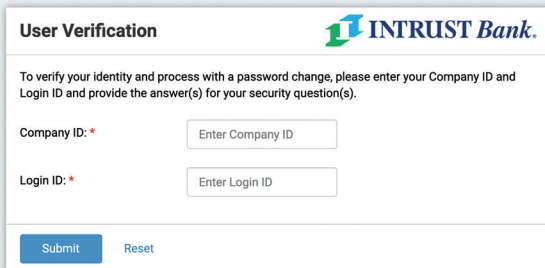
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**Business Online and Mobile Banking** are now built on one of the industry's newest digital banking platforms. You can expect a modern user experience, new features, and access to robust account data.

## 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) with a link to log in and create a new password.
- Remember to NEVER share this password with anyone, including someone claiming to be from INTRUST Bank. We will NEVER ask you for your password.



**User Verification** 

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).

Company ID: \*


Login ID: \*




## 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 

 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: \*

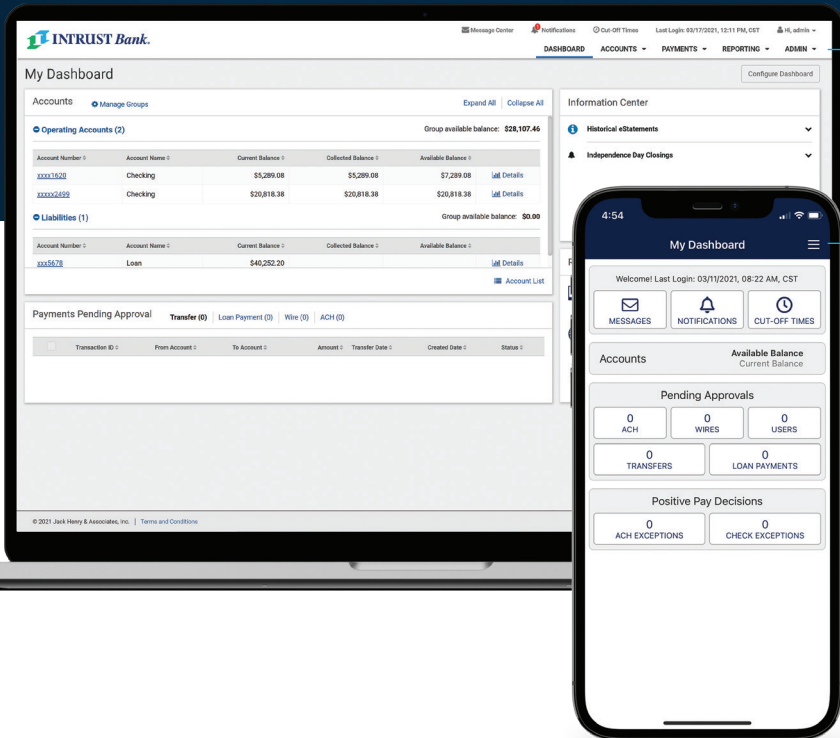
Answer: \*

- 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.

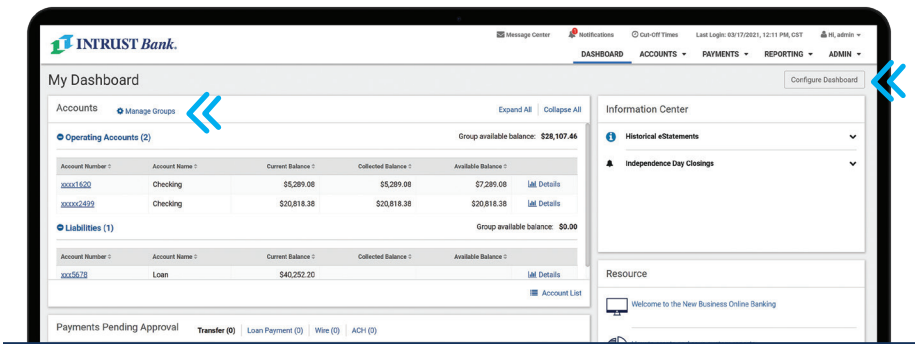
Navigation can be found on the upper-right side of the screen in online banking, or by tapping the menu icon at the upper-right side of the screen in the mobile app.



## Dashboard

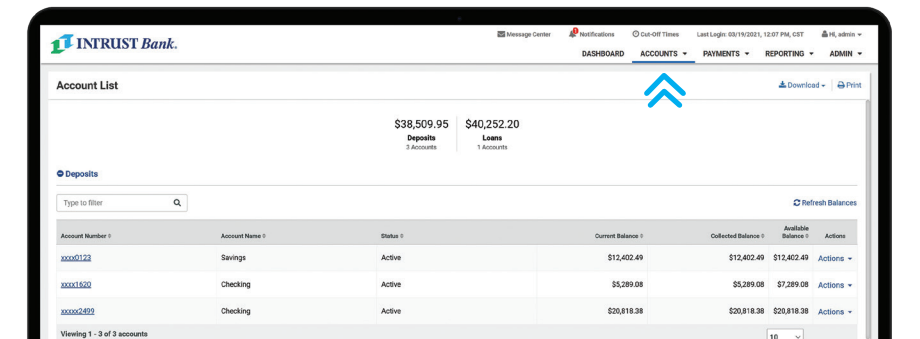
The dashboard is comprised of widgets that can be added, rearranged or removed in whichever way helps you manage your accounts most efficiently. Widgets offer both helpful information and tools to take quick action on your accounts, such as initiating a transfer. If you do not have access to something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



## 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.



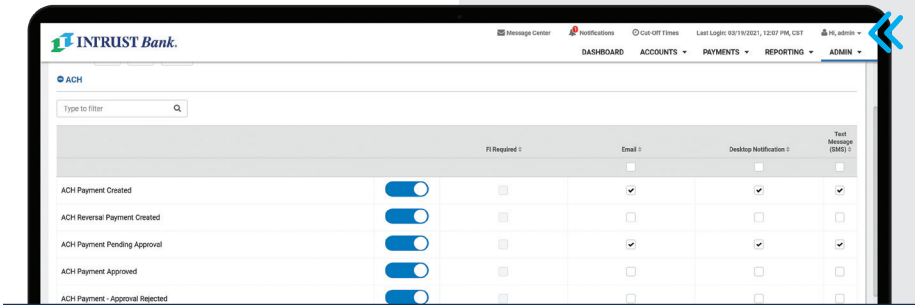
## Notifications

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



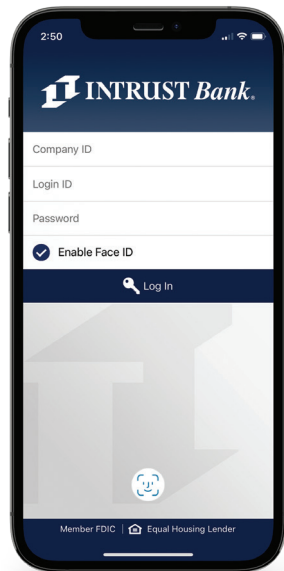
### ACTION REQUIRED:

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.
- If you have the old INTRUST Business Banking app on your phone, **delete it**.
- After logging in to online banking, 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

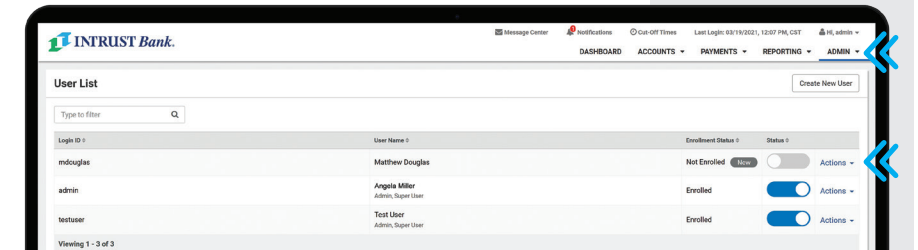
If you manage additional business online banking users, we recommend reviewing their settings. Use the User Setup Guide you previously downloaded from the previous version of online banking as a reference.

- 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. Users will be unable to initiate or approve payments until limits are in place.

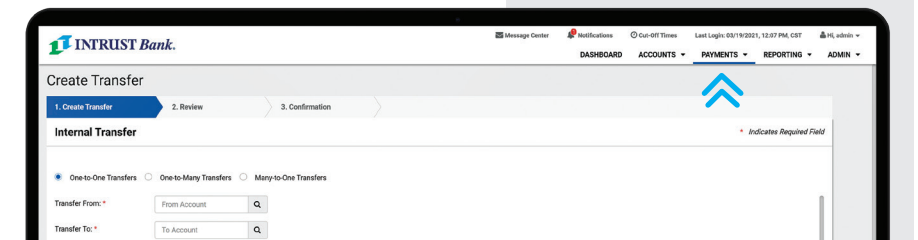


## Transfers

- 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.



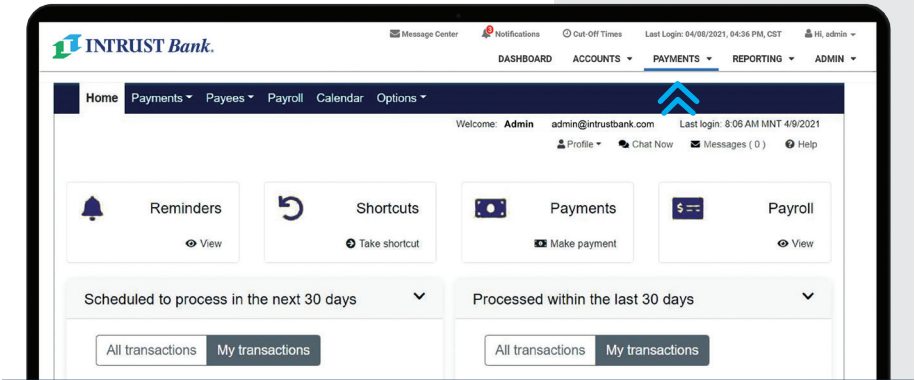


## Bill Pay *(if your company is contracted for Bill Pay)*

- 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.



# 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**.