![INTRUST Bank logo]

INTRUST Business Online Banking Pre-Conversion Checklist
For business online banking users

As part of our technology conversion taking place June 11-13, we are introducing a new version of INTRUST Business Online and Mobile Banking. As a business online banking user, we recommend you **take the following actions prior to June 11** to prepare for the conversion.

☐ **Review and update your contact information**
We will share important information about the technology conversion, especially via email.

1. From the main menu, select *Administration > Manage contact preferences*
2. Review and update contact information as needed

☐ **Administrators: Review and update or delete users**
All business online banking users, regardless of status, will receive an email with login instructions on June 14. If you have current company users whom you do not want to have access, delete their online banking profile.

1. From the main menu, select *Administration > Manage users*
2. Click the name of a user to view, edit or delete their system access
3. Repeat for each user

☐ **Administrators: Download a User Setup Report**
If you have multiple users, the User Setup Report will help you properly review and verify each user's entitlements and limits in the new platform on June 14.

1. From the main menu, select *Administration > User setup report*
2. Select your desired output format
3. Click *Generate report*

☐ **Download historical statements with check images**
Historical statements with check images will be unavailable starting June 11 through August. If you believe you may need copies of historical statements during this time, please download them.

1. From the main menu, select *Reports > Statements and documents*
2. Select the account for which you would like to view statements and click *Continue*
3. Check the boxes next to the statement dates you would like to download
4. Click *Download selected documents*
5. Repeat for each account for which you need copies of statements

☐ **Record any scheduled one-time or recurring transfers**
Both one-time and recurring transfers scheduled to occur beyond June 11 will not be migrated to the new platform. Record these transfers to help you reestablish them on or after June 14.

1. From the main menu, select *Transfers and Payments > Next scheduled requests*
2. Click *Print this page* in the upper-right of the screen