



# INTRUST Personal Online and Mobile Banking Walkthrough Video Transcript

## Customizing your dashboard and accounts.

In both mobile and online banking, the first page you will see is the Dashboard.

Your accounts and corresponding balances are displayed at the top of the dashboard. Click the three dots above the accounts to change how they are displayed. You can choose between a Compact, Expanded or Total view that summarizes your accounts. Select **Organize Accounts** to change the order in which your accounts appear.

Beneath your list of accounts are quick links to take common actions, such as initiating a transfer, paying a bill, or depositing a check if you are using the mobile app.

The cards on your dashboard are customizable. Organize them to fit your personal preferences. Select the three dots at the top of any card to change the size of the card or rearrange the cards on your dashboard.

Use the **Organize dashboard** tool at the bottom of the page to rearrange, remove, or add cards. Any changes you make to your dashboard will be reflected in both online and mobile banking.

## Organize your accounts

From the main menu, select **Accounts**. At the bottom of your accounts list, select **Organize accounts**. Drag and drop your accounts to reorder them. Click **Done** when you've finished.

Click the name of any account to access its detail page. To rename an account as it appears in online and mobile banking, click **Settings** and then **Rename**. You can use up to 20 characters. Once you've entered the account name, click **Save**.

## View your eStatements

Access statements and other documents from the Account Detail page. Select **Documents** to access the documents page.

## Set up Alerts

Alerts can help you stay updated on the status of your accounts. They can also help prevent fraudulent activity.

From the account detail page, select **Alert preferences**. You can set up balance and transaction alerts. To add a new alert, click **Add alert**. Set the parameters for the alert and the delivery method. Once parameters and delivery method have been entered, select **Add alert**.

## Transactions

Organize your transactions with tags, notes, and even images. For example, you could add an image of the item you purchased or a photo of the receipt.

Select any transaction to bring up the transaction detail page. Select **Add tags**, **Add notes**, or **Attach image** to add whichever you would like.

## We're here to help

Contact a customer service representative at 800-895-2265.

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