



Online Banking User Guide

Sub-User Management

Updated February 2019

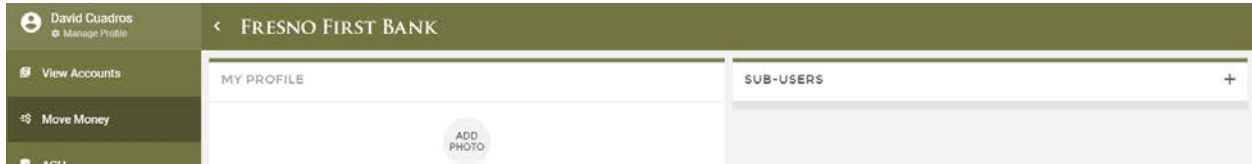
Contents

Create a New Sub-User

Editing a Sub-User

Create a New Sub-User

The Sub-Users page is where you can see all existing sub-users or create new sub-users. This is found by clicking the manage profiles button in the top left corner



To begin creating a new sub-user, click on the + button near the top right of the page. This will bring up the Create New Sub-User wizard that will help guide you through the process of creating a new sub-user.

The first step in creating a new sub-user is entering the necessary information, including:

- Full Name
- Email Address
- Display Name
- Invite Answer

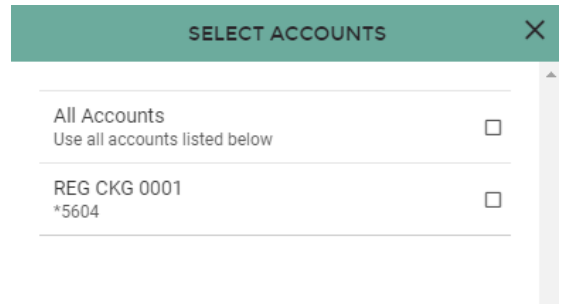
Other fields that are displayed but are not required are:

- Admin Sub-User – This will give the user access and permission to **everything**. They will be able to move money, create wires and ACH's etc.
- Give All Owner's Accounts – This will allow the sub-user to view all the owners accounts – even personal.
- Can Modify Transaction Category Name
- Deposit Capture

The last section of information is the **Has Access To** section. This is where you can grant your sub-user access to accounts. To grant access to accounts, click the **Grant Access to Accounts** button.

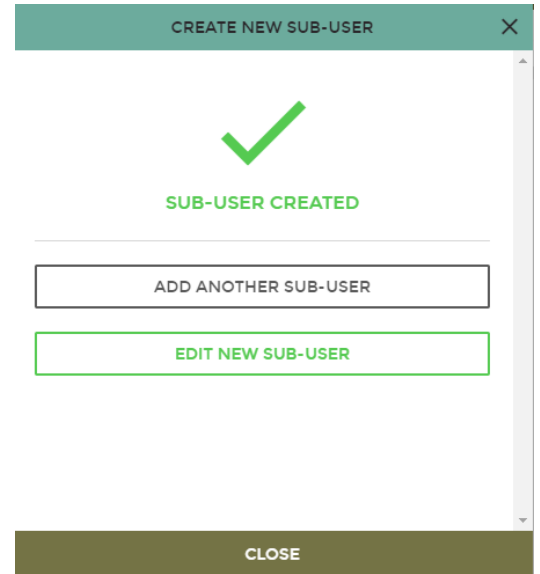
A screenshot of the 'CREATE NEW SUB-USER' wizard. The title bar is green with the text 'CREATE NEW SUB-USER' and a close button. Below the title bar is a dropdown menu labeled 'COPY EVERYTHING FROM...' with a right arrow. A note below reads: 'If you wish to copy account access and permissions from an existing sub-user, you may select that sub-user here.' The form contains several input fields: 'FULL NAME', 'EMAIL ADDRESS', 'DISPLAY NAME', and 'INVITE ANSWER', each with a 'required' label. Below these are two radio button options: 'Admin Sub-User' (with a description: 'With this permission enabled, the sub-user will be promoted to a sub-user admin, allowing them to edit, add, and delete lesser sub-users.') and 'Give All Owner's Accounts' (with a description: 'With this permission enabled, the sub-user will be given access to...'). At the bottom is a grey button labeled 'CREATE SUB-USER'.A screenshot of the 'HAS ACCESS TO:' section. It features a dropdown menu with a plus sign and the text '+ Grant Access to Accounts'. Below this is a grey button labeled 'CREATE SUB-USER'.

The **Select Accounts** screen will be displayed listing all available accounts. If you would like to grant access to all the accounts at once, select the **All Accounts** option. Otherwise, check the boxes to the right of the accounts to grant the sub-user access. If you have previously created a sub-user with the same permission, you are able to copy the permission after you have clicked submit.



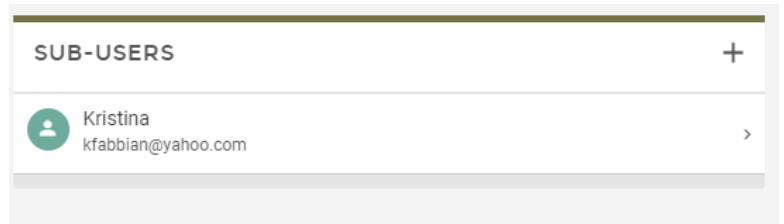
Once accounts have been selected, you can click **Continue** to return to the previous page.

All accounts that have been selected will display. You can click on the **Remove** link to remove an account from the list. Once all information, settings, and accounts have been set, you can click the **Create Sub-User** button to complete the process.



You will see a success message, letting you know that the sub-user was created. From this screen, you can add another sub-user, edit the new sub-user, or close the window to exit the wizard.

The new sub-user will be listed in the **Sub-Users** grid.



Editing a Sub User

To edit a sub-user, select the sub-user from the list that you wish to edit.

Here, you can view sub-user information, user settings, and account permissions. Text entry fields that are editable are marked with a pencil icon.

Making changes to a field will trigger the system to save the changes immediately and a **Success** message will be displayed at the bottom of the screen.

Account permission can be edited by clicking the **Permissions** button or by clicking the **Edit** button of the desired account.

Account access can be removed by clicking the **Remove** button for the desired account.

Access can be granted to additional accounts by clicking the **Grant Access to Account** button and selecting the desired account(s).

Sub-users can be deleted by clicking the **Delete this Sub-User** button.

When editing account permissions, account access and limits can be edited.

If you would like to copy permissions from another sub-user for this account, click the **Copy Permission From** button.

Select the sub-user you would like to use and their settings will be set for the sub-user being edited.

Account limits can be set by clicking the **Edit** button within the credit/ debit. Limit field and entering the desired amount. Amounts cannot exceed the max amounts seen under each limit description.

Once all changes have been made, click the **Save All Permissions** button.

A **Success** message will be displayed at the bottom of the screen.

