Adding Sub-Users

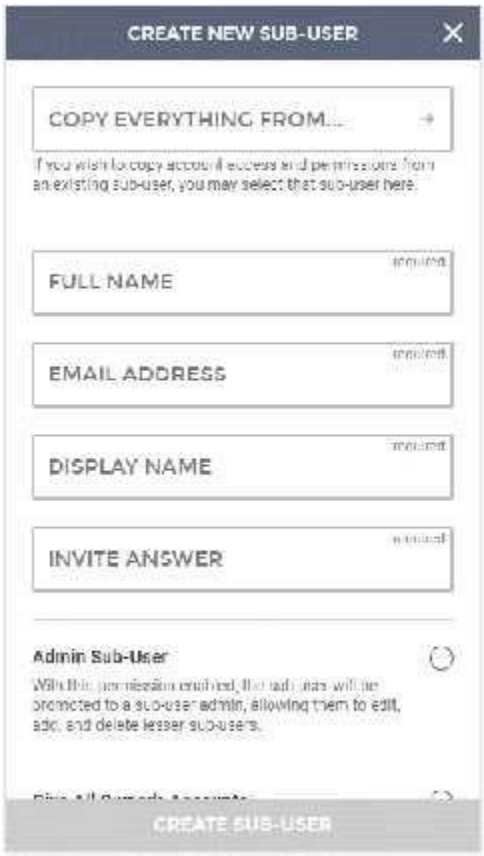
Step 1: Create New Sub-User

The **Sub-Users** page is where you can see all existing sub-users or create new sub-users.

To begin creating a new sub-user, click on the **+** button at 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 user information, including:

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



The customer to input the corresponding information that belongs to sub-user.

> The **EMAIL** provided is where the system will generate a sub-user Internet banking setup link to.
> The **INVITE ANSWER** is something the customer will need to provide their sub-user with.

Step 2: Set up Sub-User Accounts

The last section 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 **+** button.

The Select Accounts screen will be displayed listing all available accounts. If you'd like to grant access to all accounts at once, select **All Accounts**. For specific accounts, check the boxes to the right of the accounts to grant them access.

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

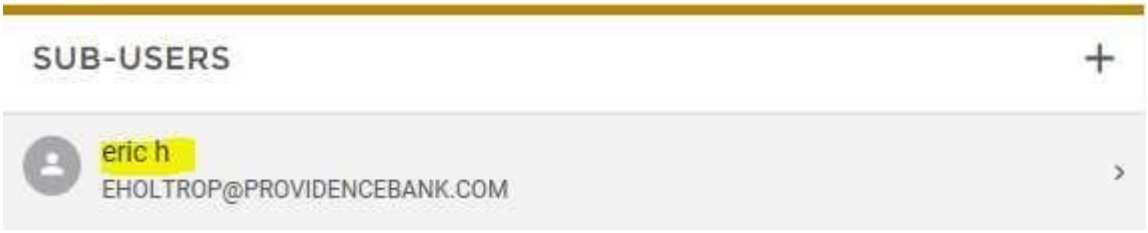
Upon finishing the process, you will see a **Success** message, letting you know that the sub-user was created.

Once the Master user submits the invite the sub-user will appear on the Admin side as a Customer with the word "SUBUSER" next to the customer's name.

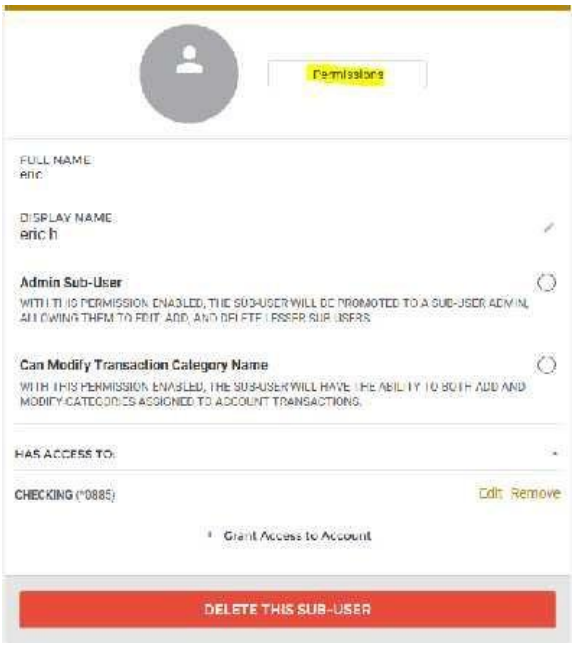
Step 3: Setting up Sub-User permissions

Now that the sub-user has account access, the next step is to limit the permissions sub-users can have to the account.

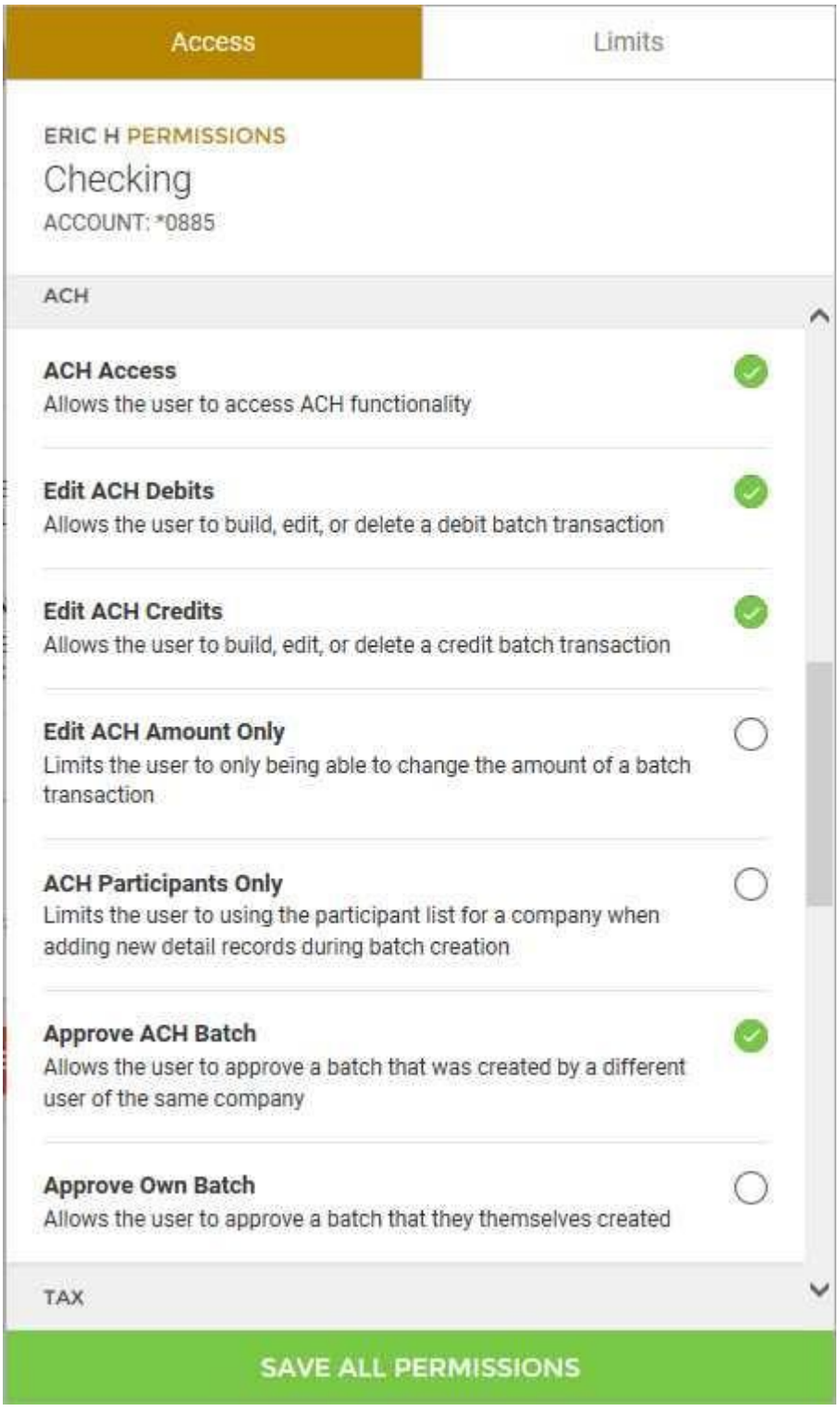
Select the Sub-User to edit



Select Permissions, then select the account

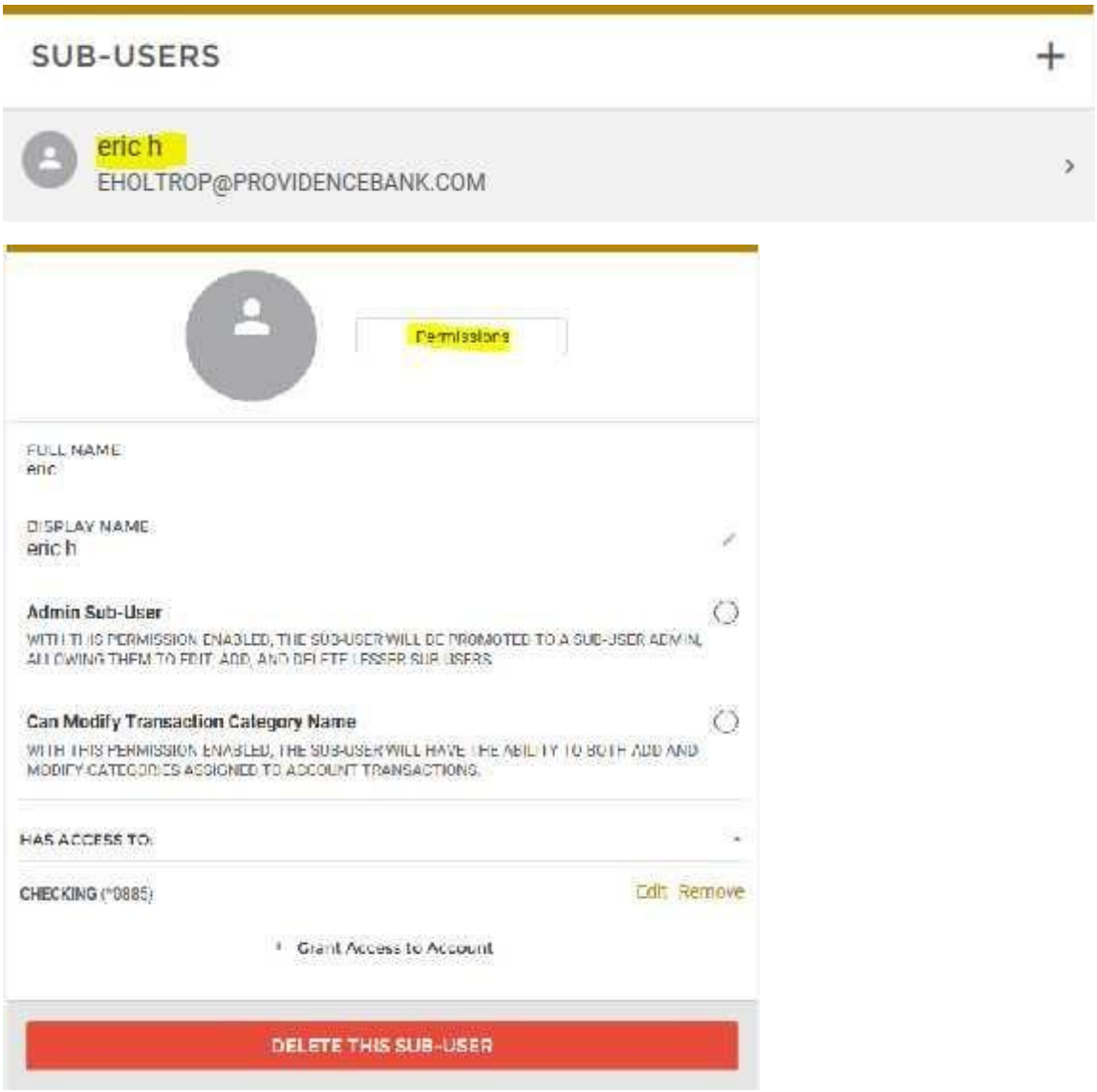


Select the desired permissions and select save



Modify Company: This permission allows for sub-user to make changes to company information tied to master user.

Modify Participants: This permission allows for sub-users to edit participants belonging to that company under the Participants tab.

Admin Sub-User: This permission allows for sub-users to create and edit other sub-users.

Step 5: Edit Existing Sub-User(s)