

Adding Sub-Users

Step 1: Create New Sub-User

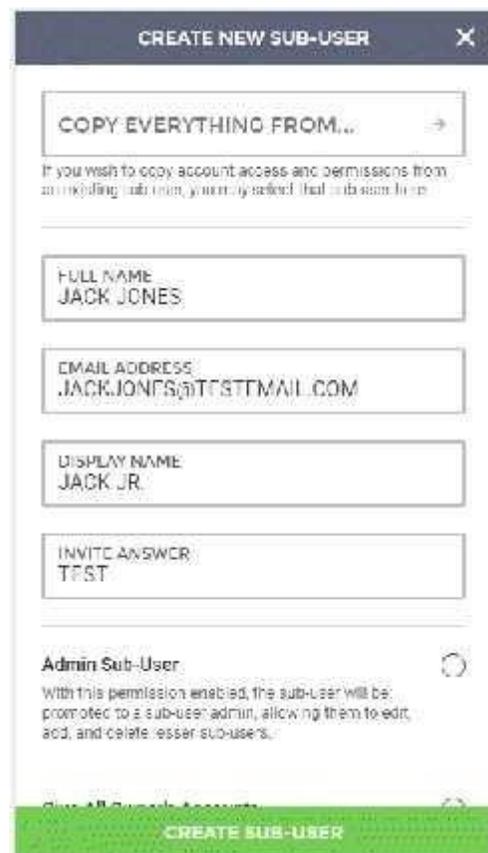
The **Sub-Users** page is where you can see all existing sub-users or create new sub-users.

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

A screenshot of a mobile application form titled "CREATE NEW SUB-USER" with a close button (X) in the top right corner. The form contains a "COPY EVERYTHING FROM..." dropdown menu with a right-pointing arrow. Below it is a note: "If you wish to copy account access and permissions from an existing sub-user, you may select that sub-user here." There are four input fields, each with a "required" label on the right: "FULL NAME", "EMAIL ADDRESS", "DISPLAY NAME", and "INVITE ANSWER". At the bottom, there is a section for "Admin Sub-User" with a toggle switch, 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 a link "View All Groups Accounts" with a right-pointing arrow. A grey bar at the very bottom contains the text "CREATE SUB-USER".A screenshot of the same "CREATE NEW SUB-USER" form, but with the input fields filled. The "FULL NAME" field contains "JACK JONES", the "EMAIL ADDRESS" field contains "JACK.JONES@ITTESTMAIL.COM", the "DISPLAY NAME" field contains "JACK JR.", and the "INVITE ANSWER" field contains "TEST". The "Admin Sub-User" section and the bottom bar are identical to the previous screenshot. A green bar at the very bottom contains the text "CREATE SUB-USER".

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.

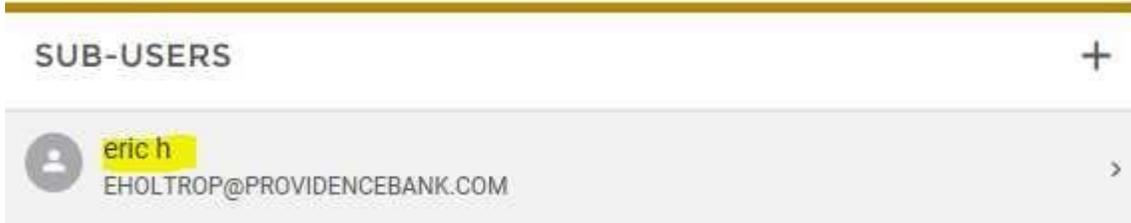
Once the Master user submits the invite the sub-user will appear on the Admin side as a Customer with the word "SUBUSER" next to the customer's name.

Edit User	Delete Invite Disable		Pending	John Doe (SUBUSER)	1/1/1900 12:00:00 AM
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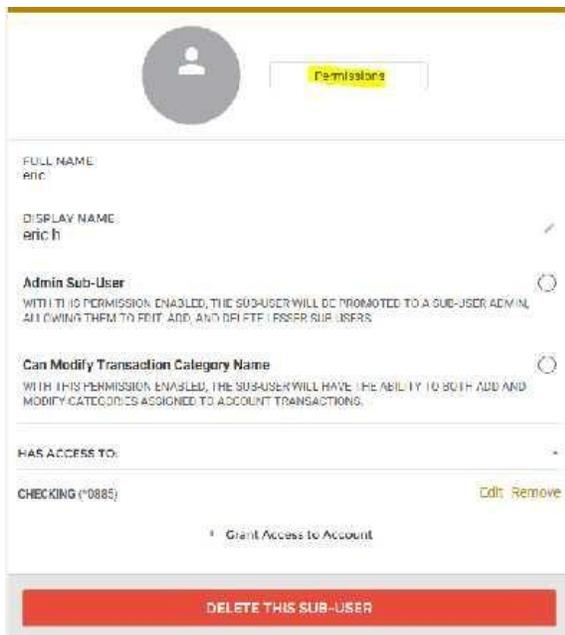
Step 3: Setting up Sub-User permissions

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

Access	Limits
<p>ERIC H PERMISSIONS</p> <p>Checking</p> <p>ACCOUNT: *0885</p>	
<p>ACH</p>	
<p>ACH Access Allows the user to access ACH functionality</p>	<input checked="" type="checkbox"/>
<p>Edit ACH Debits Allows the user to build, edit, or delete a debit batch transaction</p>	<input checked="" type="checkbox"/>
<p>Edit ACH Credits Allows the user to build, edit, or delete a credit batch transaction</p>	<input checked="" type="checkbox"/>
<p>Edit ACH Amount Only Limits the user to only being able to change the amount of a batch transaction</p>	<input type="checkbox"/>
<p>ACH Participants Only Limits the user to using the participant list for a company when adding new detail records during batch creation</p>	<input type="checkbox"/>
<p>Approve ACH Batch Allows the user to approve a batch that was created by a different user of the same company</p>	<input checked="" type="checkbox"/>
<p>Approve Own Batch Allows the user to approve a batch that they themselves created</p>	<input type="checkbox"/>
<p>TAX</p>	
<p>SAVE ALL PERMISSIONS</p>	

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)

The screenshot displays a user management interface. At the top, a header bar contains the text 'SUB-USERS' and a plus sign icon. Below this, a user profile card is shown for 'eric h' with the email address 'EHOLTROP@PROVIDENCEBANK.COM'. A 'Permissions' button is highlighted in yellow. The main content area shows the following details:

- FULL NAME:** eric
- DISPLAY NAME:** eric h (with an edit icon)
- Admin Sub-User:** A toggle switch is currently turned on. Below it, text reads: 'WITH THIS PERMISSION ENABLED, THE SUBUSER WILL BE PROMOTED TO A SUB-USER ADMIN, ALLOWING THEM TO EDIT, ADD, AND DELETE OTHER SUB-USERS.'
- Can Modify Transaction Category Name:** A toggle switch is currently turned on. Below it, text reads: 'WITH THIS PERMISSION ENABLED, THE SUBUSER WILL HAVE THE ABILITY TO BOTH ADD AND MODIFY CATEGORIES ASSIGNED TO ACCOUNT TRANSACTIONS.'
- HAS ACCESS TO:** A dropdown menu is open, showing 'CHECKING (*0885)' with 'Edit' and 'Remove' options.
- A button labeled 'Grant Access to Account' is visible below the dropdown.

At the bottom of the interface, a prominent red button contains the text 'DELETE THIS SUB-USER'.

