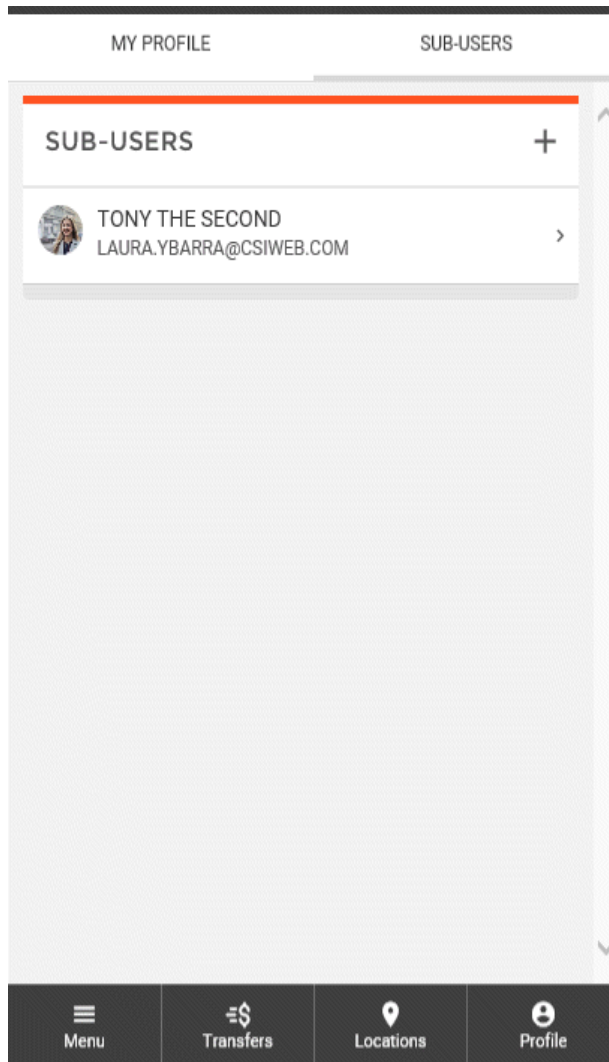


# Sub-User Management

## 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 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 user information, including:

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

**CREATE NEW SUB-USER** [X]

COPY EVERYTHING FROM... →

If you wish to copy account access and permissions from an existing sub-user, you may select that sub-user here.

FULL NAME required

EMAIL ADDRESS required

DISPLAY NAME required

INVITE ANSWER required

**Admin Sub-User**

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.

Give All Owner's Accounts

**CREATE SUB-USER**

Once all required fields have been filled out, you can click **Create Sub-User** at the bottom of the screen to proceed.

Other fields that may be displayed but are not required are:

- Admin Sub-User
- Give All Owner's Accounts
- Can Modify Transaction Category Name
- Deposit Capture

**CREATE NEW SUB-USER** [X]

COPY EVERYTHING FROM... →

If you wish to copy account access and permissions from an existing sub-user, you may select that sub-user here.

FULL NAME  
JACK JONES

EMAIL ADDRESS  
JACKJONES@TESTEMAIL.COM

DISPLAY NAME  
JACK JR.

INVITE ANSWER  
TEST

**Admin Sub-User**

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.

Give All Owner's Accounts

**CREATE SUB-USER**

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 **+** button.

**CREATE NEW SUB-USER** [X]

**Admin Sub-User**   
 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.

**Give All Owner's Accounts**   
 With this permission enabled, the sub-user will be given access to all of the owner's accounts, including the permissions and limits for those accounts.

**Can Modify Transaction Category Name**   
 With this permission enabled, the sub-user will have the ability to both add and modify categories assigned to account transactions.

**Deposit Capture**   
 Requires additional authentication for remote deposit capture

HAS ACCESS TO: ^

+ Grant Access to Accounts

**CREATE SUB-USER**

The **Select Accounts** screen will be displayed listing all available accounts.

If you'd like to grant access to all accounts at once, select the **All Accounts** option. Otherwise, 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.

**SELECT ACCOUNTS** [X]

All Accounts   
 Use all accounts listed below

\*Test Account   
 \*9901

123 Checking   
 \*3601

123 Checking 2   
 \*4401

Checking   
 \*8501

Savings   
 \*2720

0153 Loan   
 \*4443

Loan   
 \*0031

Loan   
 \*9774

Loan   
 \*7262

Loan

**CONTINUE** →

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.

The screenshot shows a modal window titled "CREATE NEW SUB-USER" with a close button (X) in the top right corner. The form contains several sections:

- Admin Sub-User**: A radio button (unchecked) with the 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."
- Give All Owner's Accounts**: A radio button (unchecked) with the description: "With this permission enabled, the sub-user will be given access to all of the owner's accounts, including the permissions and limits for those accounts."
- Can Modify Transaction Category Name**: A radio button (unchecked) with the description: "With this permission enabled, the sub-user will have the ability to both add and modify categories assigned to account transactions."
- Deposit Capture**: A radio button (unchecked) with the description: "Requires additional authentication for remote deposit capture"
- HAS ACCESS TO:**: A dropdown menu (expanded) showing a list of accounts with "Remove" links next to each:
  - 123 Checking (\*3601) Remove
  - Savings (\*2720) Remove
  - 0153 Loan (\*4443) Remove
- CREATE SUB-USER**: A large green button at the bottom of the form.

Upon finishing 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 screenshot shows the same modal window after successful completion. It features a large green checkmark and the text "SUB-USER CREATED". Below this, there are two buttons: "ADD ANOTHER SUB-USER" and "EDIT NEW SUB-USER". At the bottom of the modal, there is a red "CLOSE" button.

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

