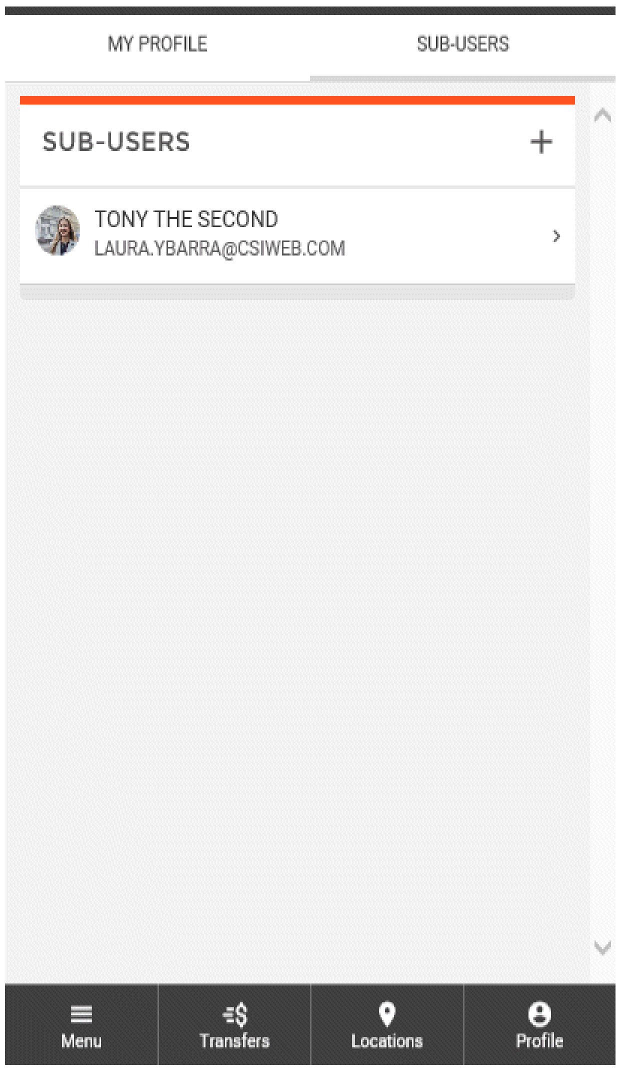
# Sub-User Management

## Create New Sub-User

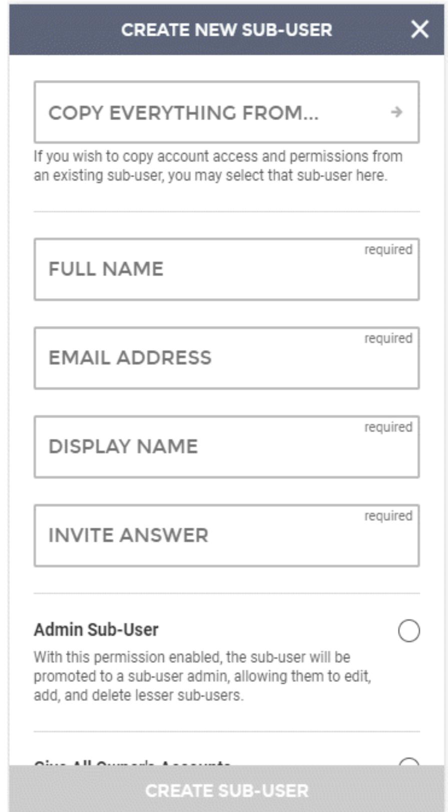
The **Sub-Users** page is where you can see all existing sub-users or create new sub-users.

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:

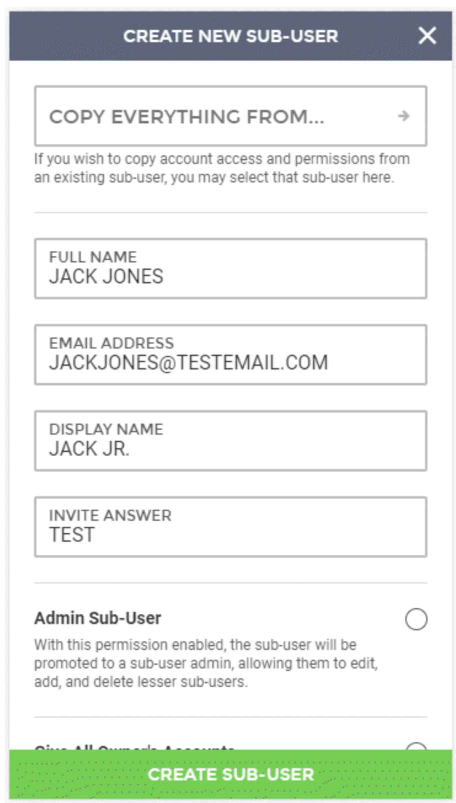
- Full Name
- Email Address
- Display Name
- Invite Answer



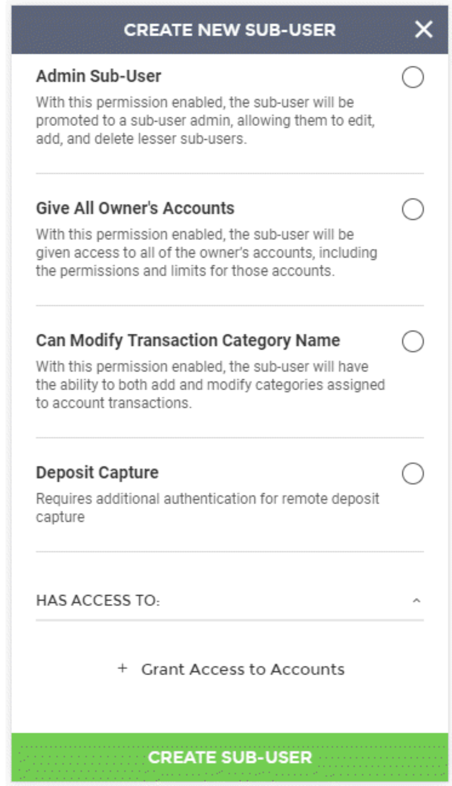

Once all required fields have been filled out, you can click **Create Sub-User** at the bottom of the screen to proceed.

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



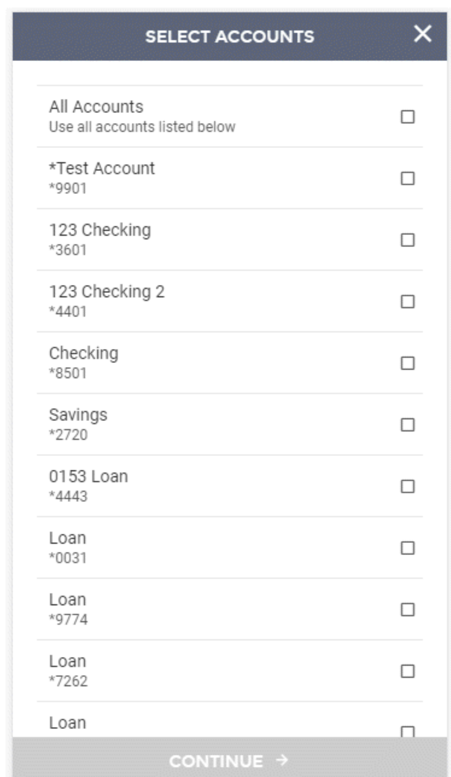
The last section of information is the **Has Access To** section. This is where you can grant your sub-user access to accounts. To grant access to accounts, click the **+** button.



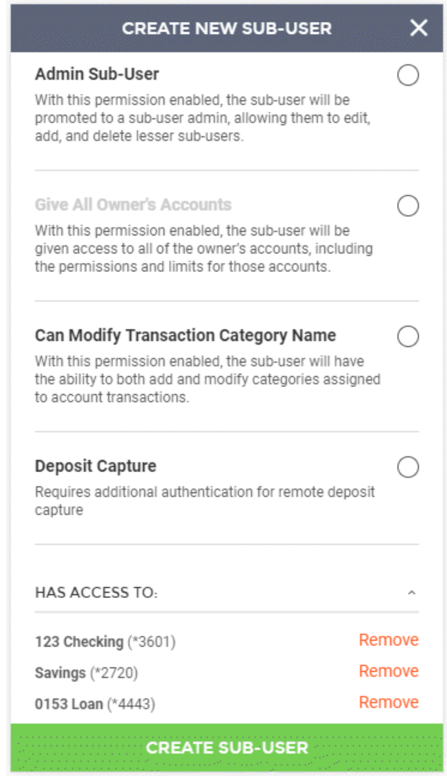

The **Select Accounts** screen will be displayed listing all available accounts.

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.

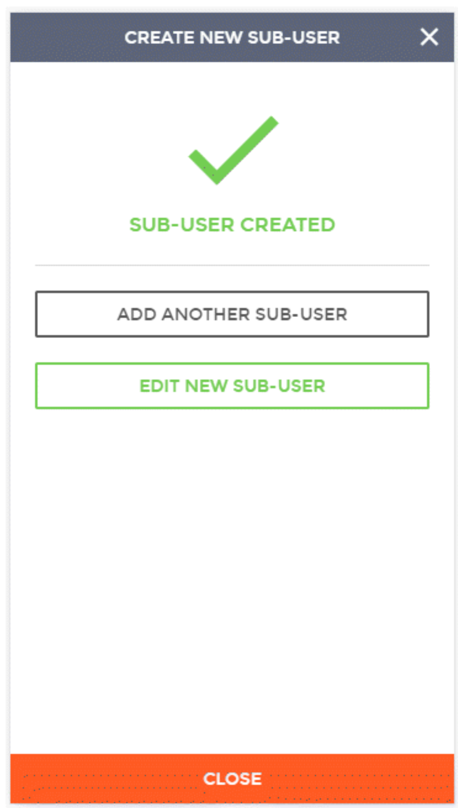


All accounts that have been selected will display. You can click on the **Remove** link to remove an account from the list. Once all information, settings, and accounts have been set, you can click the **Create Sub-User** button to complete the process.




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