

Create New Sub-User

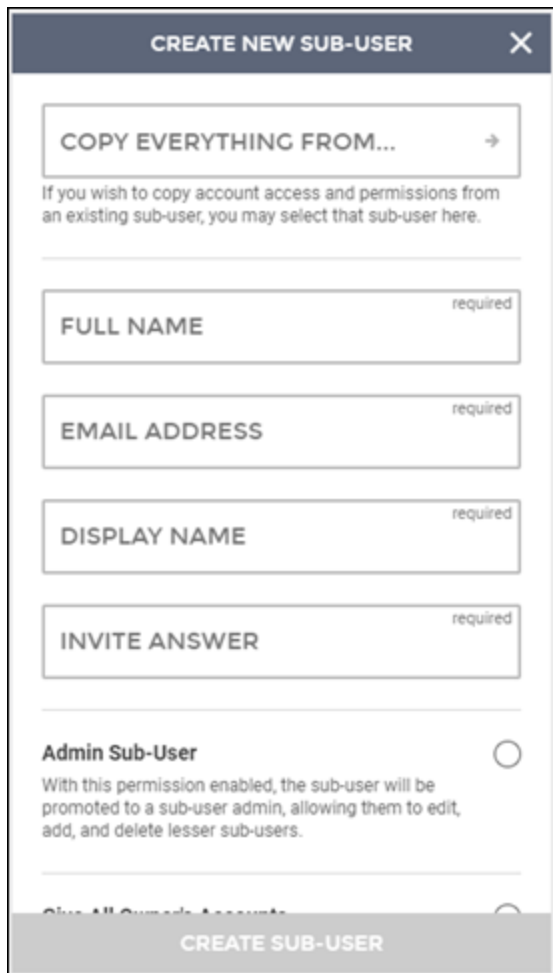
The **Sub-Users** page is where you can see all existing sub-users or create new sub-users.

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 the 'CREATE NEW SUB-USER' wizard. The form is titled 'CREATE NEW SUB-USER' with a close button (X) in the top right corner. It contains several input fields: 'COPY EVERYTHING FROM...' with a right arrow icon, followed by a descriptive text: 'If you wish to copy account access and permissions from an existing sub-user, you may select that sub-user here.' Below this are four required input fields: 'FULL NAME', 'EMAIL ADDRESS', 'DISPLAY NAME', and 'INVITE ANSWER', each with a 'required' label. At the bottom, there is a checkbox labeled '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.' Below the checkbox is another checkbox labeled 'Give All Owned Accounts'. The form ends with a 'CREATE SUB-USER' button.

CREATE NEW SUB-USER

×

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

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

- Admin Sub-User
- Give All Owner's Accounts
- Same Day ACH (if enabled for your account by your bank)
- Can Modify Transaction Category Name
- Deposit Capture

CREATE NEW SUB-USER

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 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.

SELECT ACCOUNTS

X

All Accounts Use all accounts listed below	<input type="checkbox"/>
*Test Account *9901	<input type="checkbox"/>
123 Checking *3601	<input type="checkbox"/>
123 Checking 2 *4401	<input type="checkbox"/>
Checking *8501	<input type="checkbox"/>
Savings *2720	<input type="checkbox"/>
0153 Loan *4443	<input type="checkbox"/>
Loan *0031	<input type="checkbox"/>
Loan *9774	<input type="checkbox"/>
Loan *7262	<input type="checkbox"/>
Loan	<input type="checkbox"/>

CONTINUE →

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.

CREATE NEW SUB-USER

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:

123 Checking (*3601)

Remove

Savings (*2720)

Remove

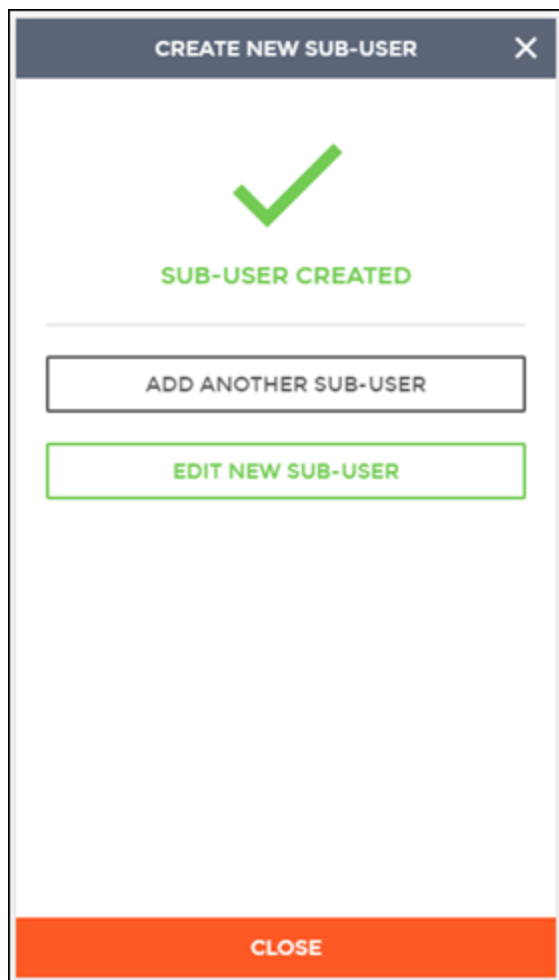
0153 Loan (*4443)

Remove

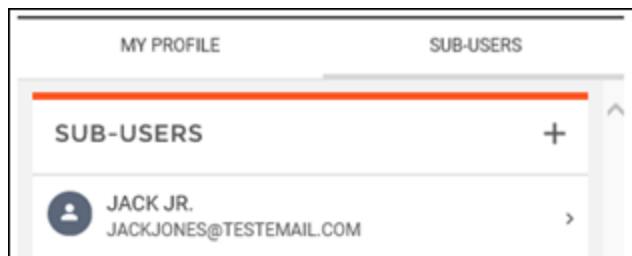
CREATE SUB-USER

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.



See Also

[Editing a Sub-User](#)

[How do I delete a Sub-User?](#)

[How do I unlock a Sub-User?](#)