

Create New Sub-User

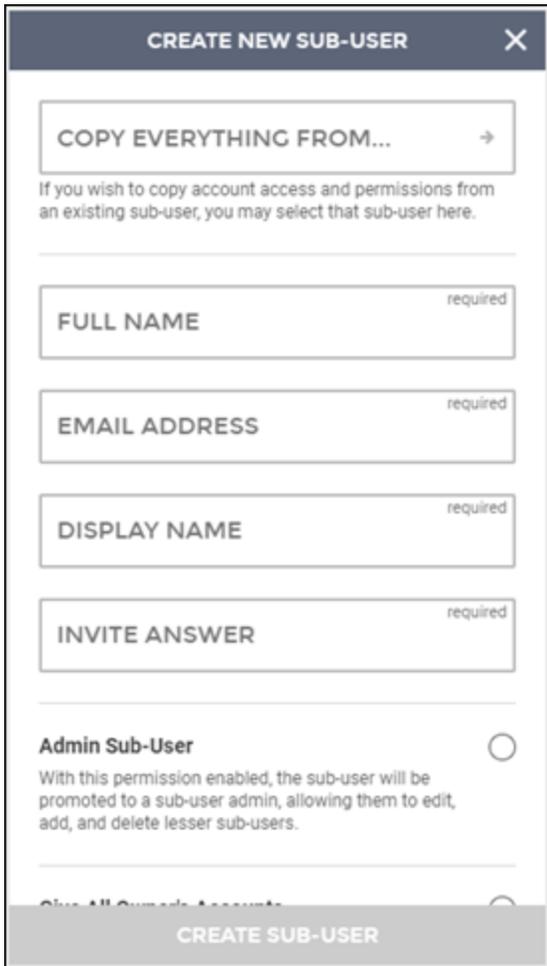
The **Sub-Users** page is where you can see all existing sub-users or create new sub-users.

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-style wizard titled "CREATE NEW SUB-USER" with a close button (X) in the top right corner. The wizard contains several input fields and a toggle switch. At the top, there is a button labeled "COPY EVERYTHING FROM..." with a right-pointing arrow. Below this is a paragraph of text: "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". Below these fields is a section titled "Admin Sub-User" with a radio button. The text below the radio button reads: "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." At the bottom of the form, there is a button labeled "CREATE SUB-USER".

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 ✕

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 →

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.

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Deposit Capture
Requires additional authentication for remote deposit capture

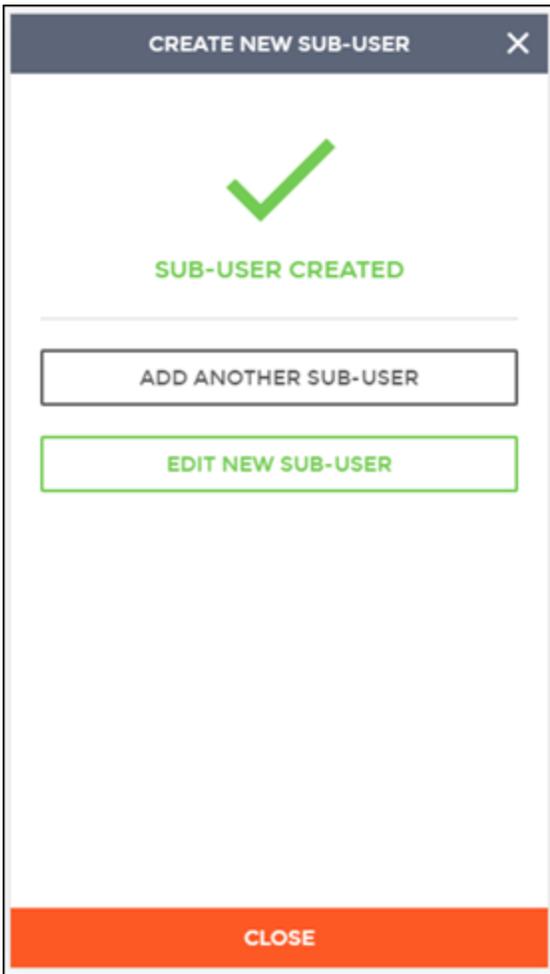
HAS ACCESS TO: ^

123 Checking (*3601)	Remove
Savings (*2720)	Remove
0153 Loan (*4443)	Remove

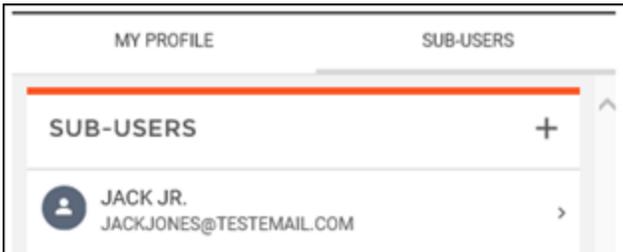
CREATE SUB-USER

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?](#)