Sub-User Management

IB_262

Printed on 11 February, 2019

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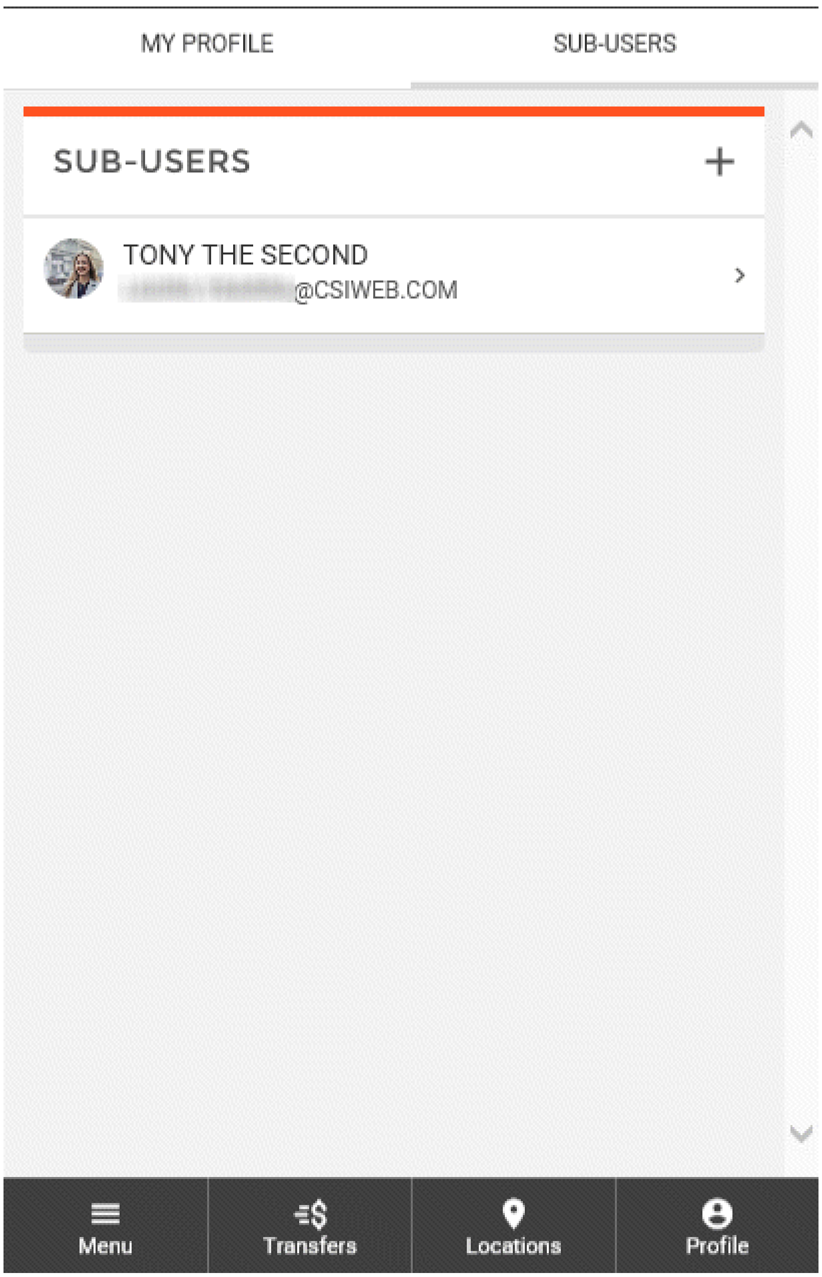
Sub-User Management

Create New Sub-User

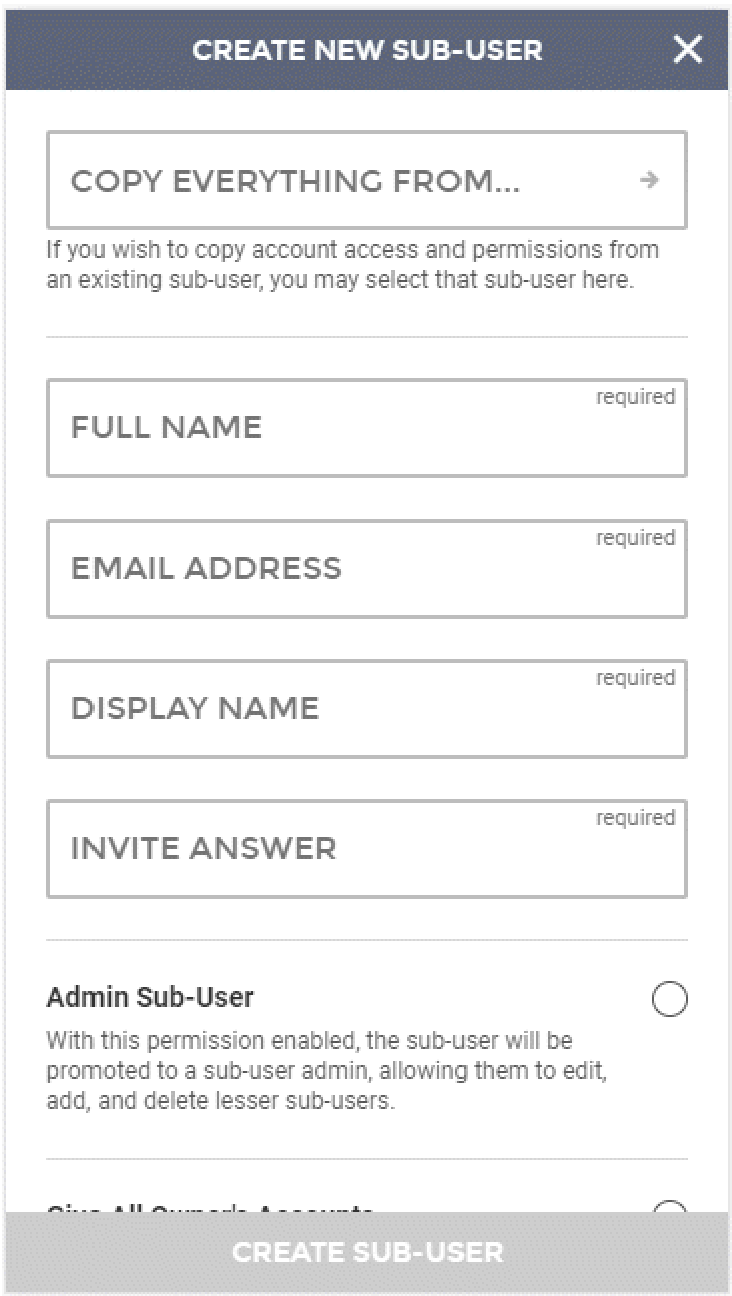
The **Sub-Users** page is where you can see all existing sub-users or create new sub-users.

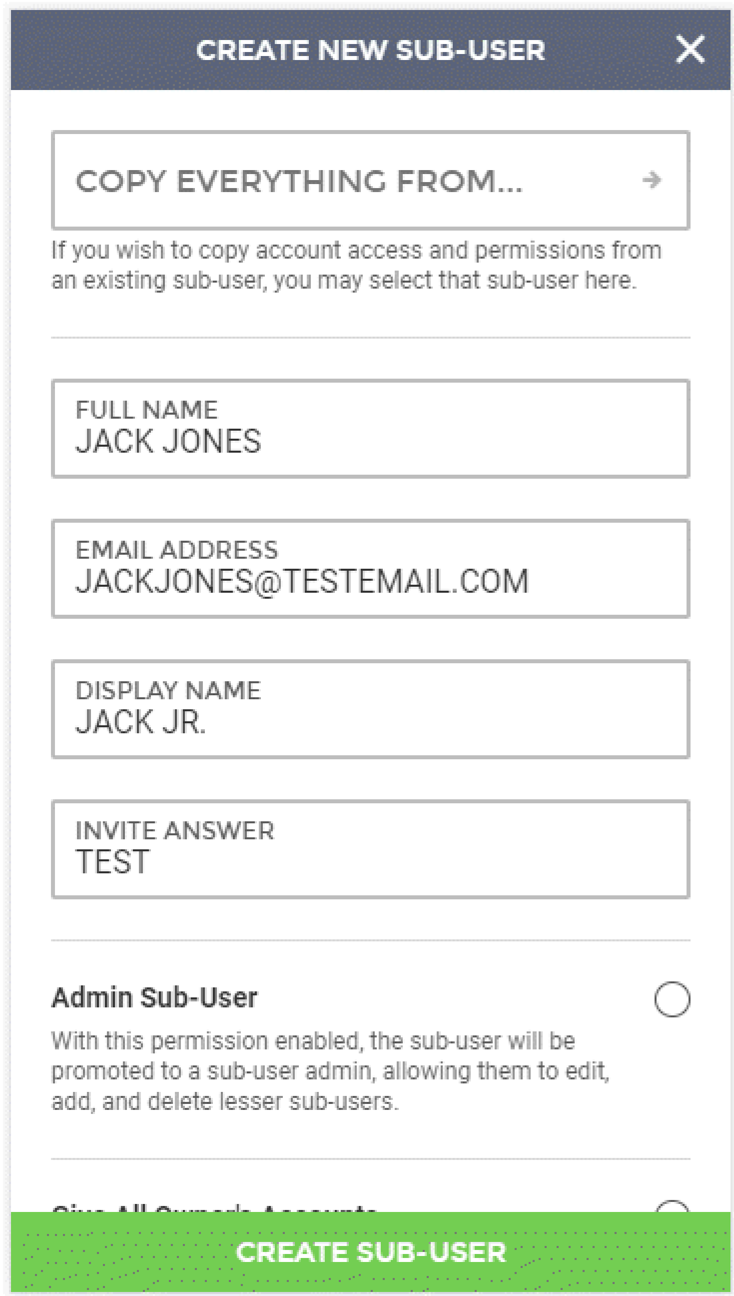
To begin creating a new sub-user, click on the **+** button at the top right of the page. This will bring up the **Create New Sub-User** wizard that will help guide you through the process of creating a new sub-user.



The first step in creating a new sub-user is entering the necessary user information, including:

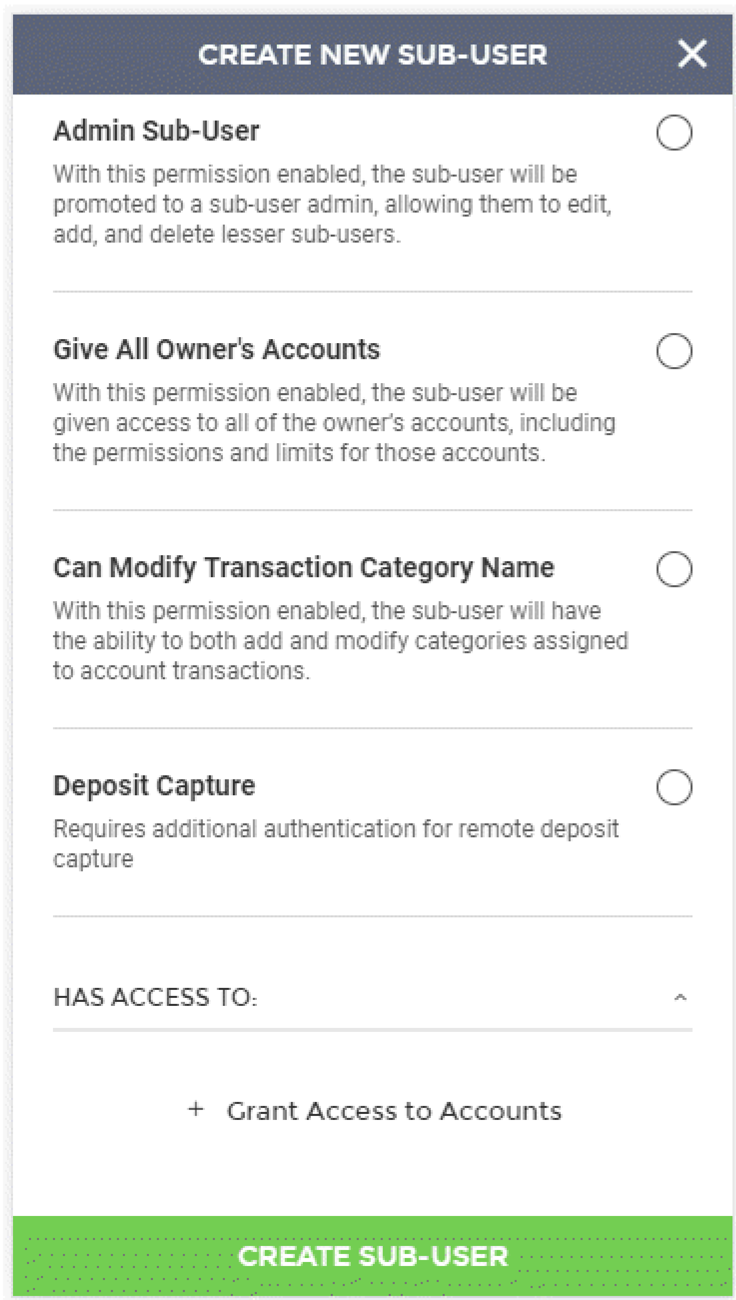
- Full Name
- Email Address
- Display Name
- Invite Answer




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.
CREATE SUB-USER

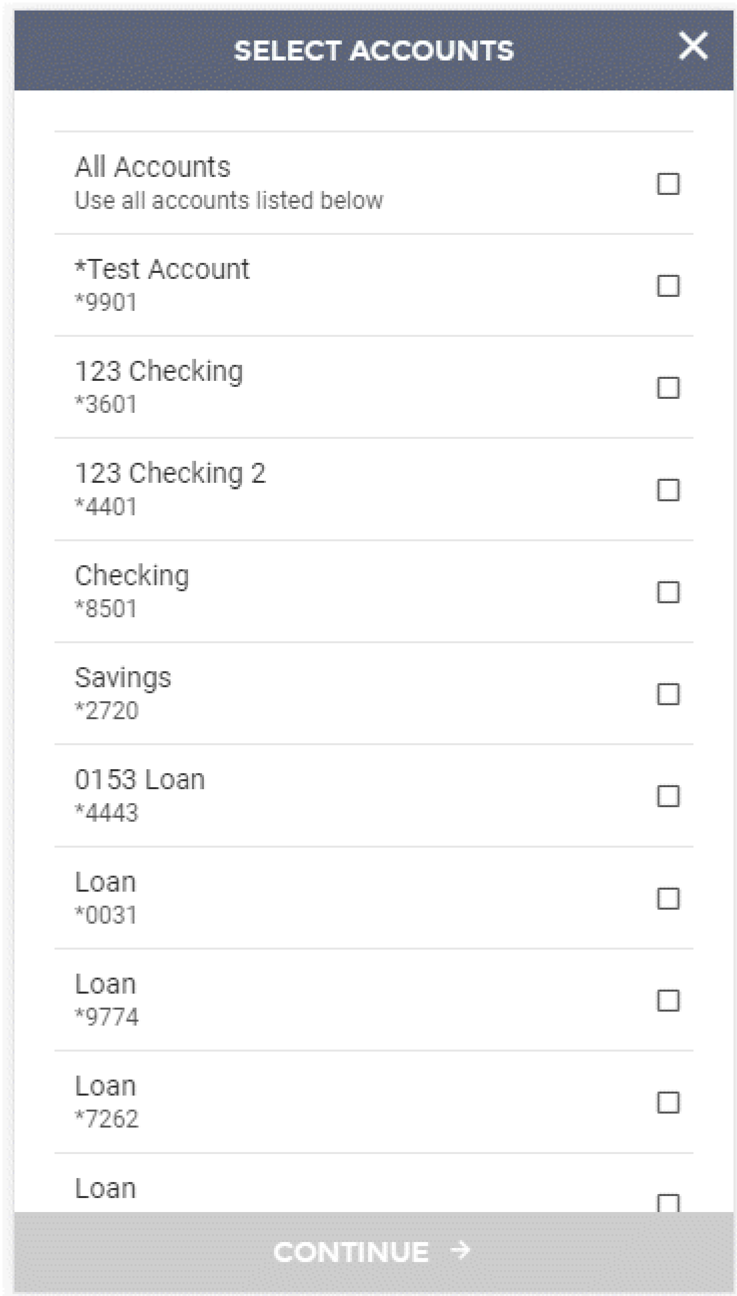
Other fields that may be displayed but are not required are:

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



The last section 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.

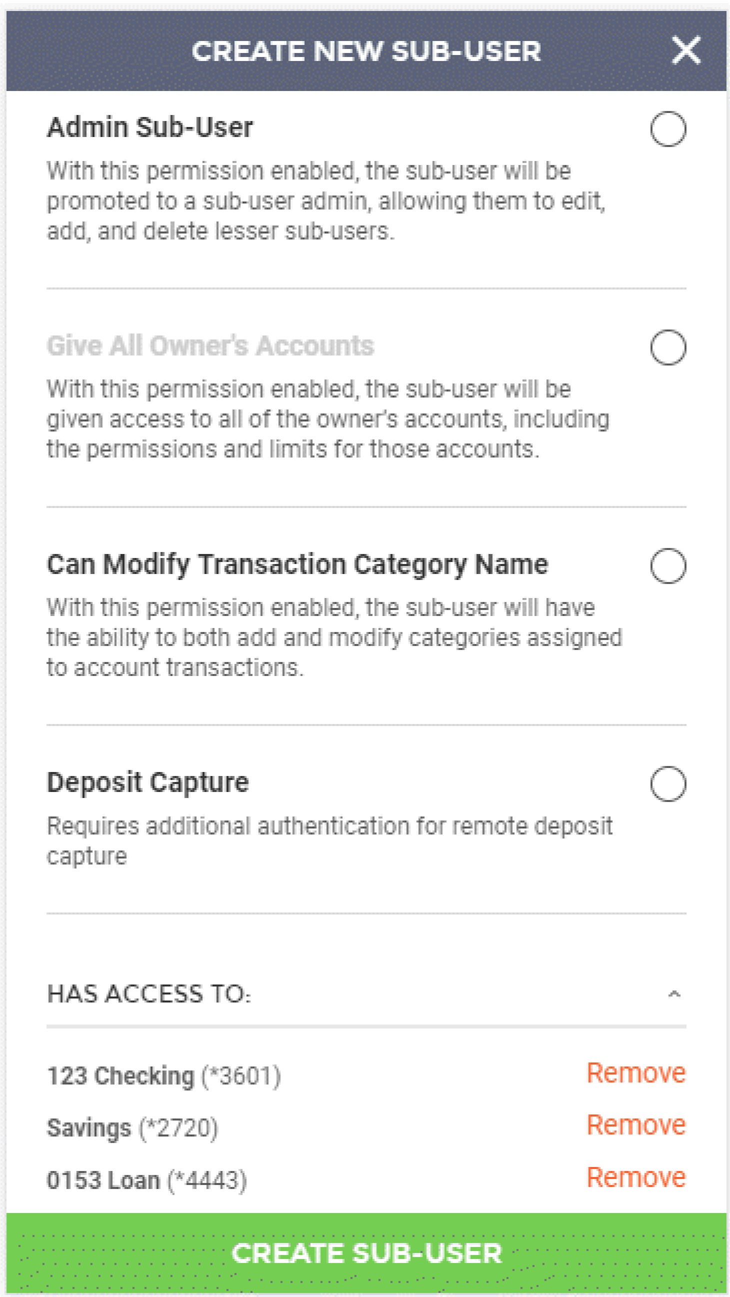
The Select Accounts screen will be displayed listing all available accounts. If you'd like to grant access to all accounts at once, select **All Accounts**. For specific accounts, check the boxes to the right of the accounts to grant them access.



Once accounts have been selected, you can click **Continue** to return to the previous page.

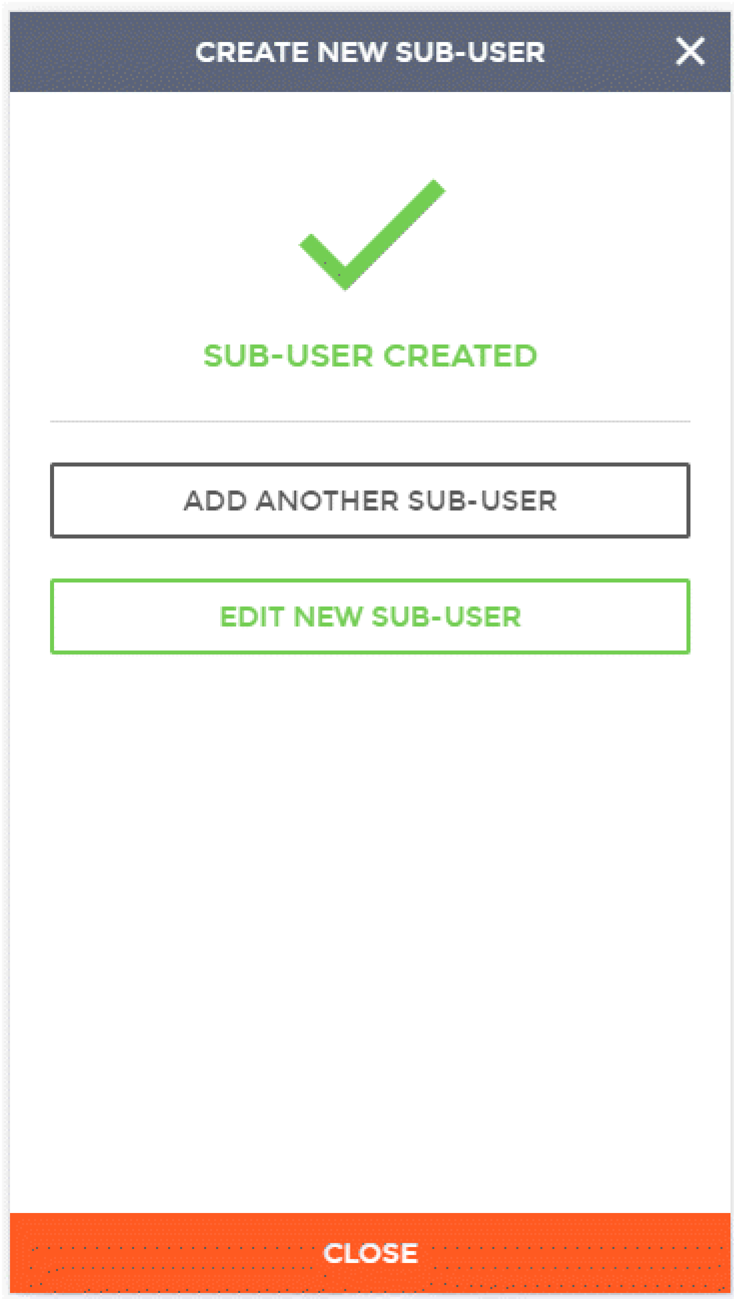
All accounts that have been selected will display. You can click on the **Remove** link to remove an account from the list.

Once all information, settings, and accounts have been set, you can click the **Create Sub-User** button to complete the process.

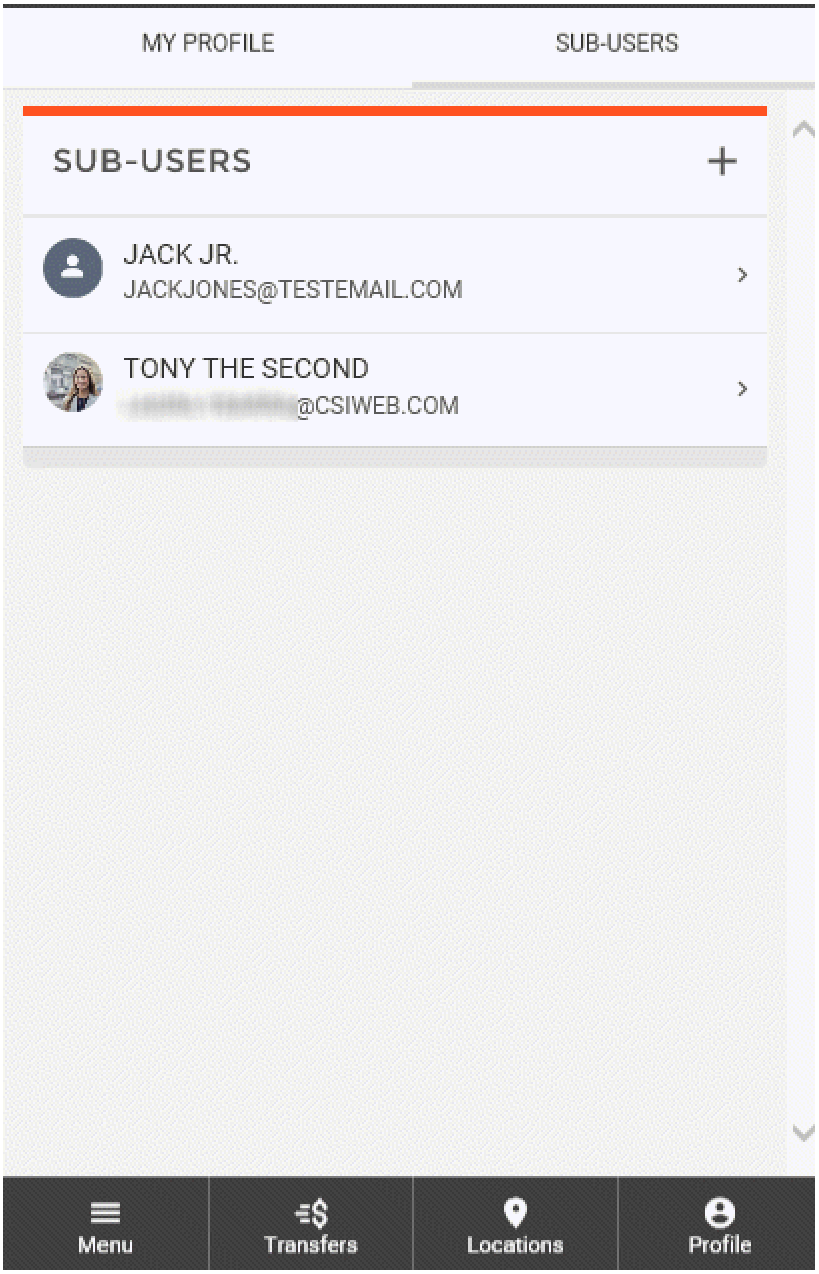


Upon finishing the process, you will see a **Success** message, letting you know that the sub-user was created.

From this screen, you can add another sub-user, edit the new sub-user, or close the window to exit the wizard.

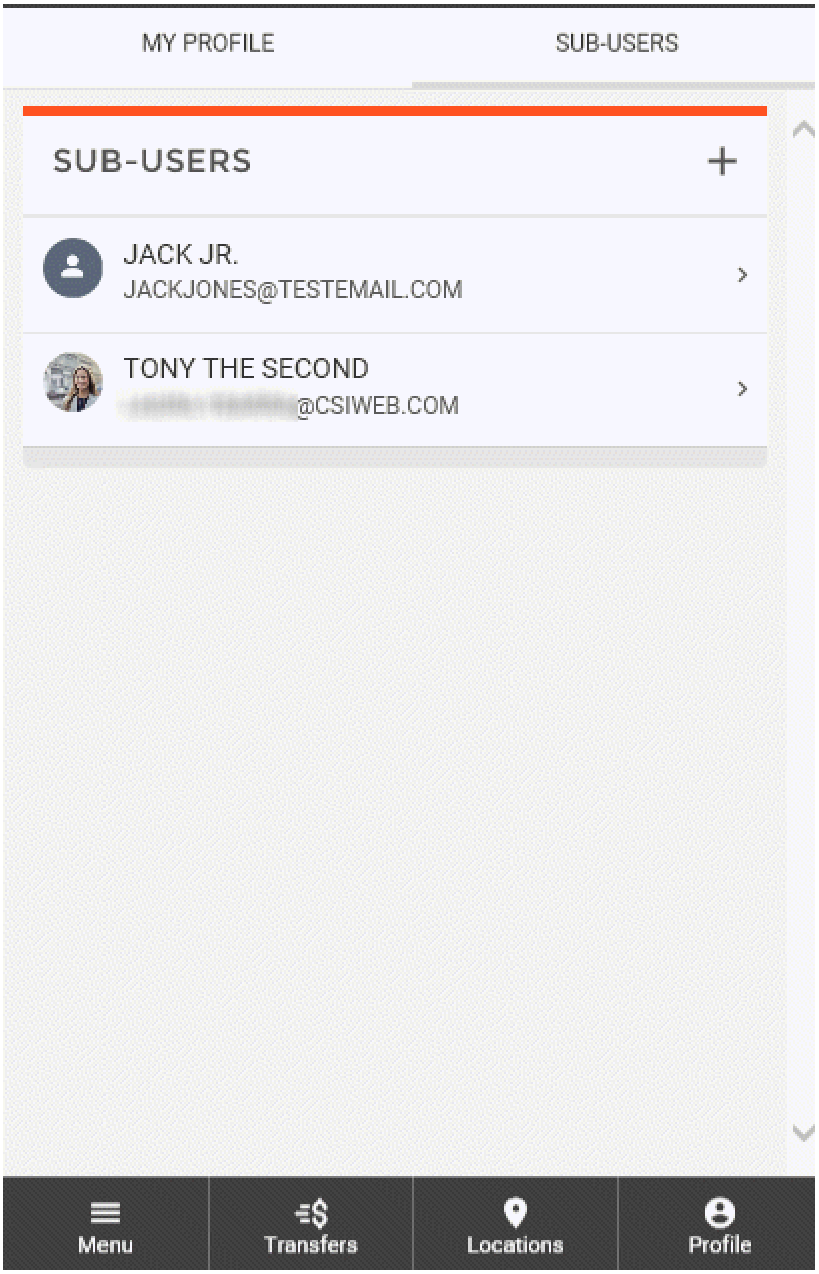


The new sub-user will be listed in the **Sub-Users** grid.



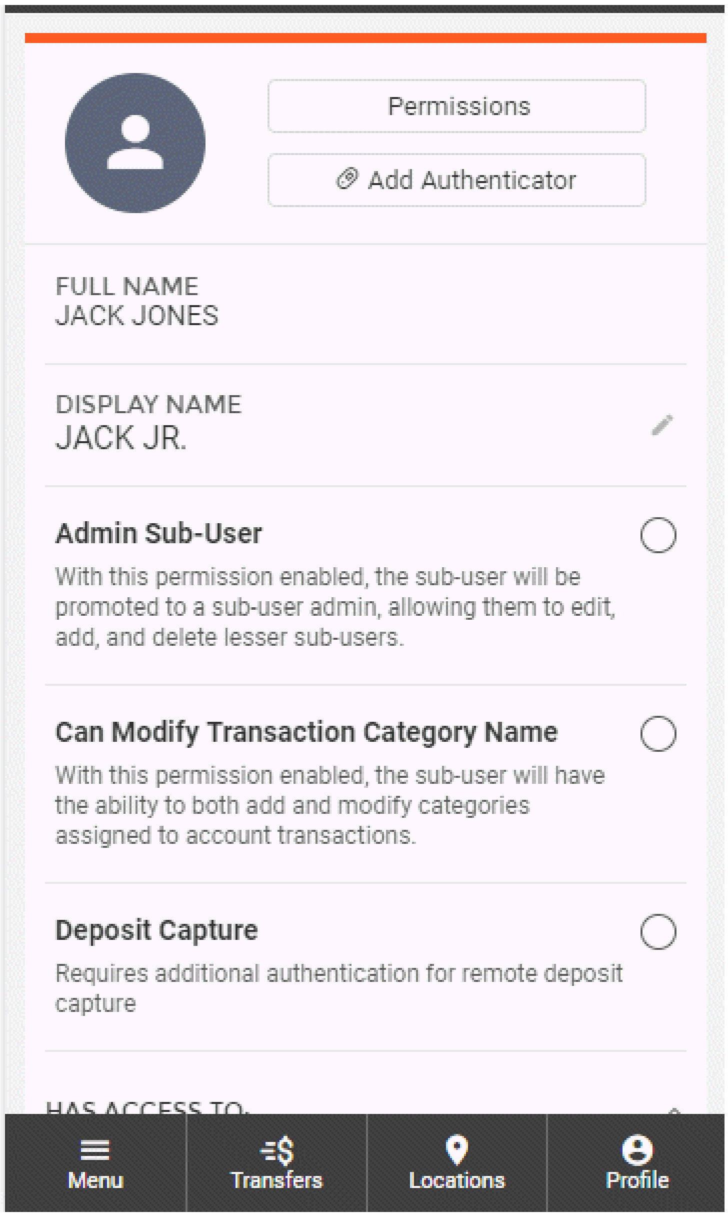
Editing a Sub-User

To edit a sub-user, select the sub-user from the list that you wish to edit.

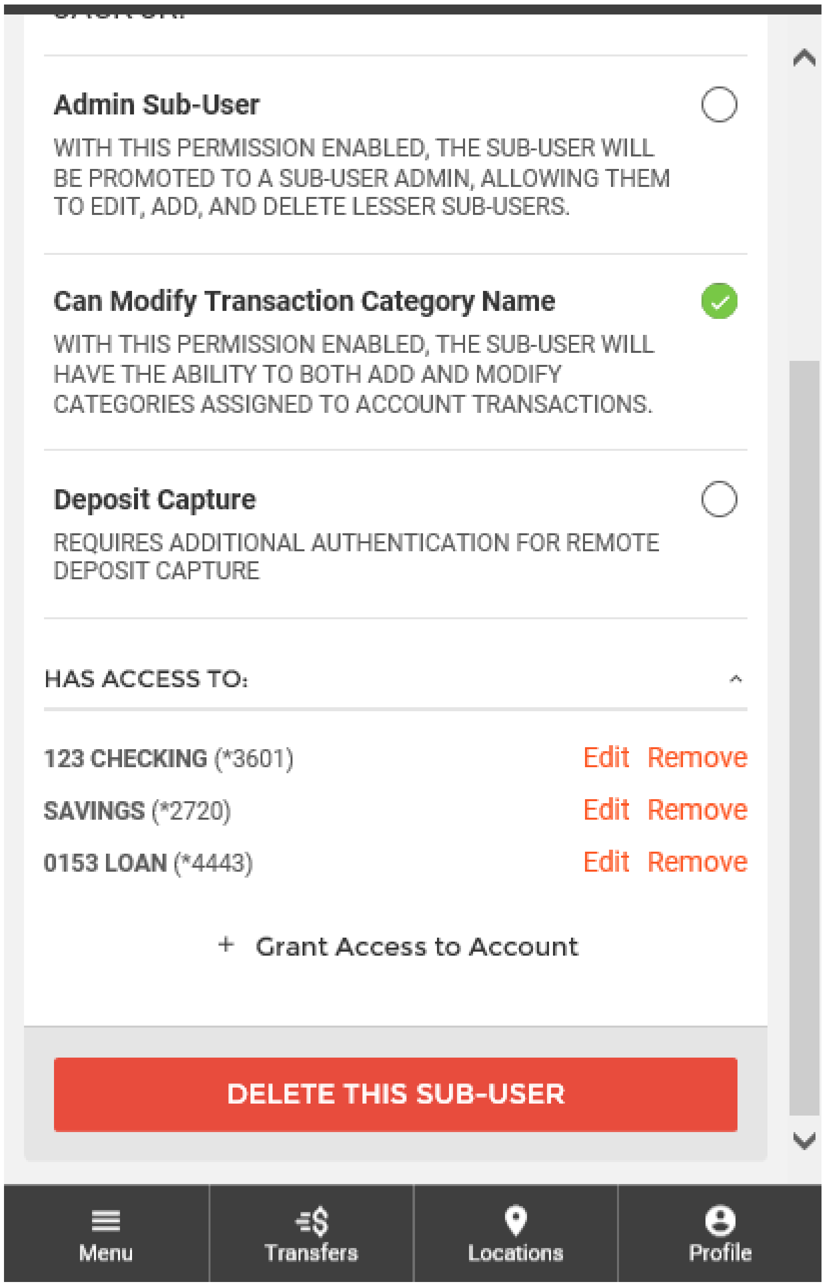


Here, you can view sub-user information, user settings, and account permissions. Text entry fields that are editable are marked with a **Pencil** icon.

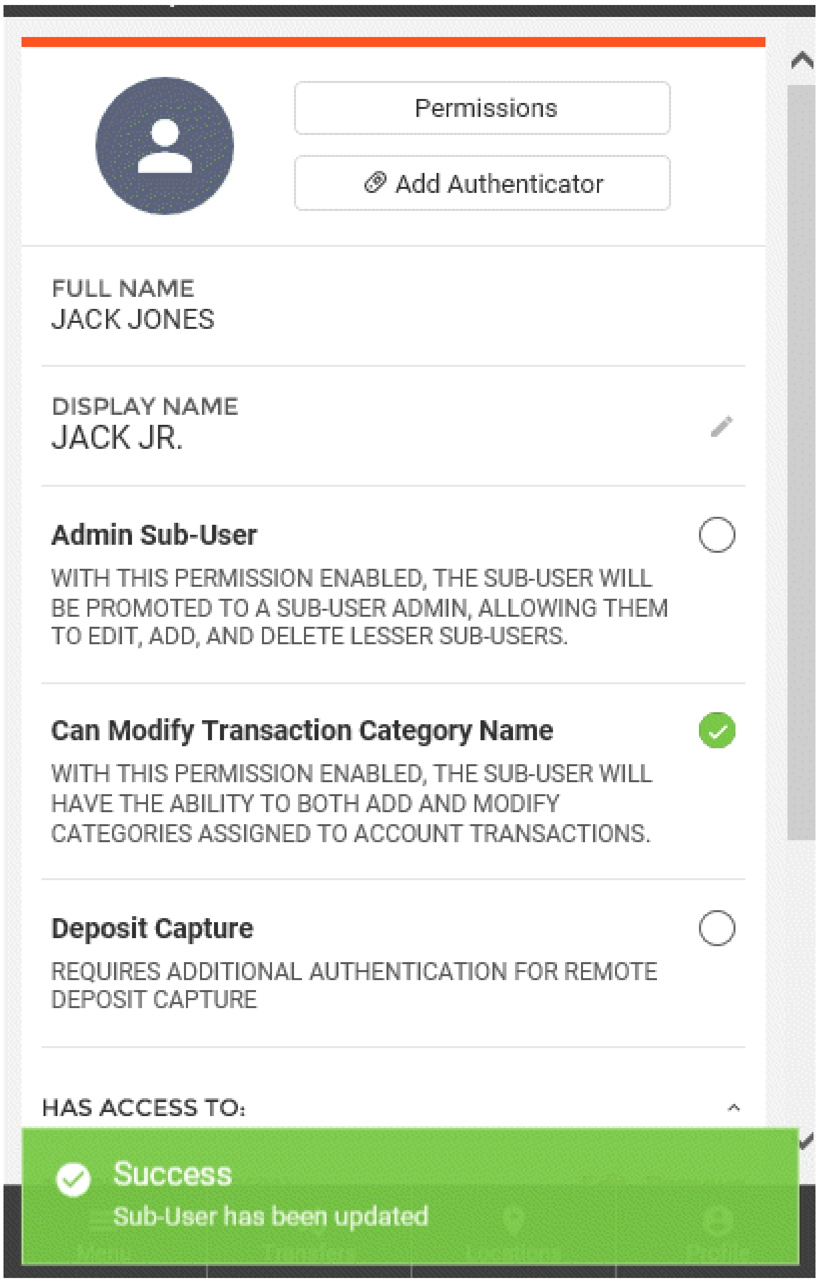
- Account permissions can be edited by clicking the **Permissions** button or by clicking on the **Edit** button of the desired account.



- Account access can be removed by clicking the **Remove** button for the desire account.
- Access can be granted to additional accounts by clicking the **Grant Access to Account** button and selecting the desired account(s).
- Sub-users can be deleted by clicking the **Delete this Sub-User** button.

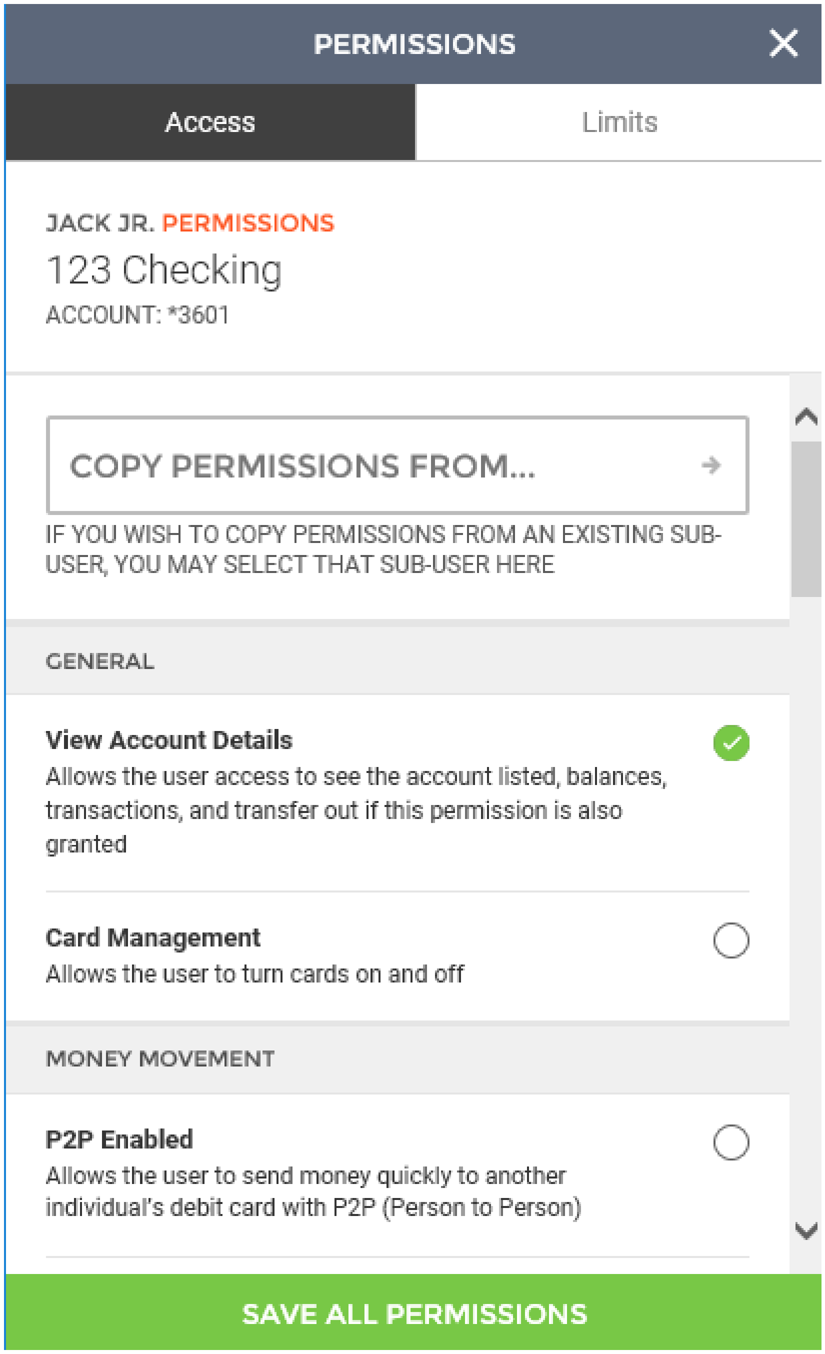


Making changes to a field will trigger the system to save the changes immediately and a **Success** message will be displayed at the bottom of the screen.

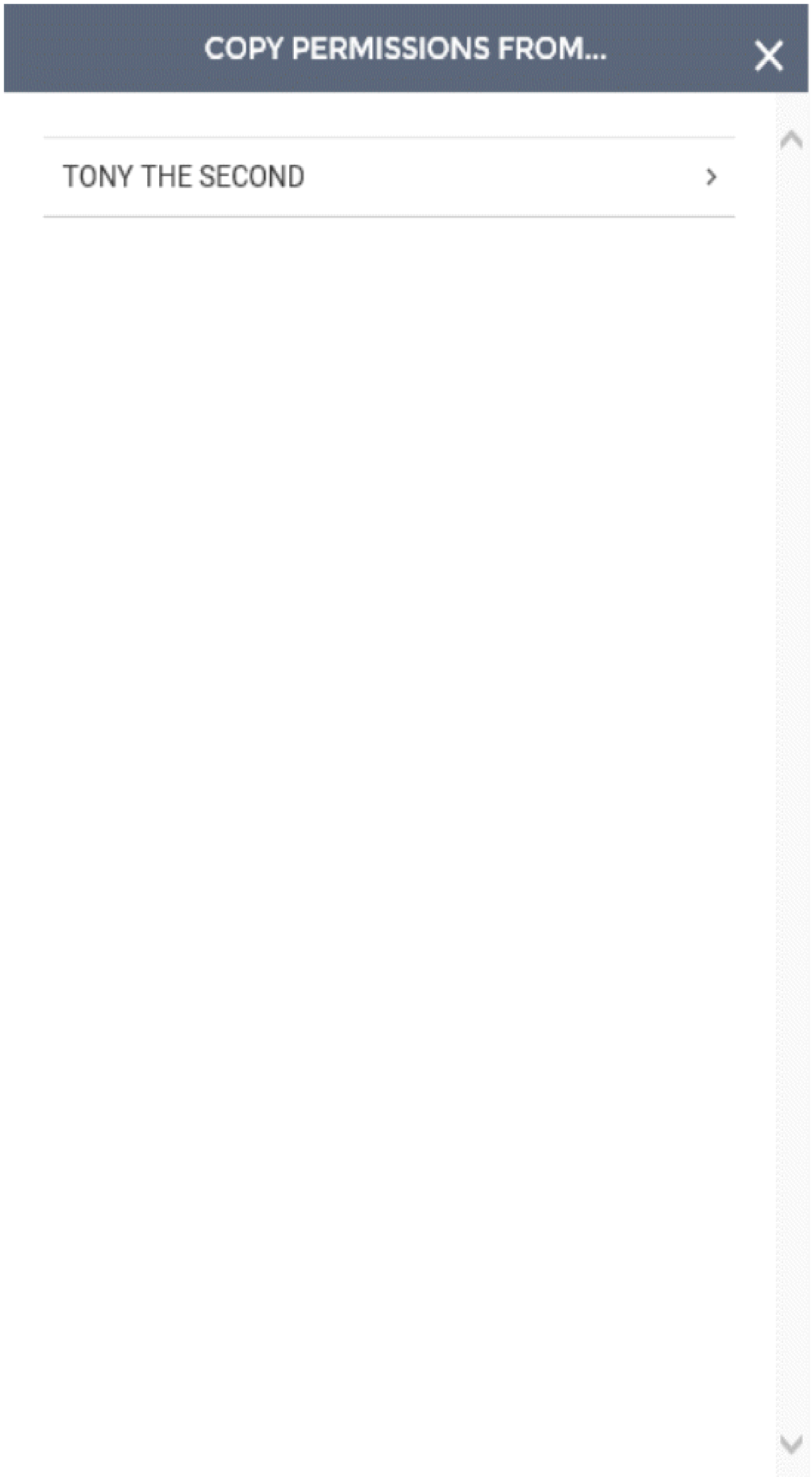


When editing account permissions, account access and limits can be edited.

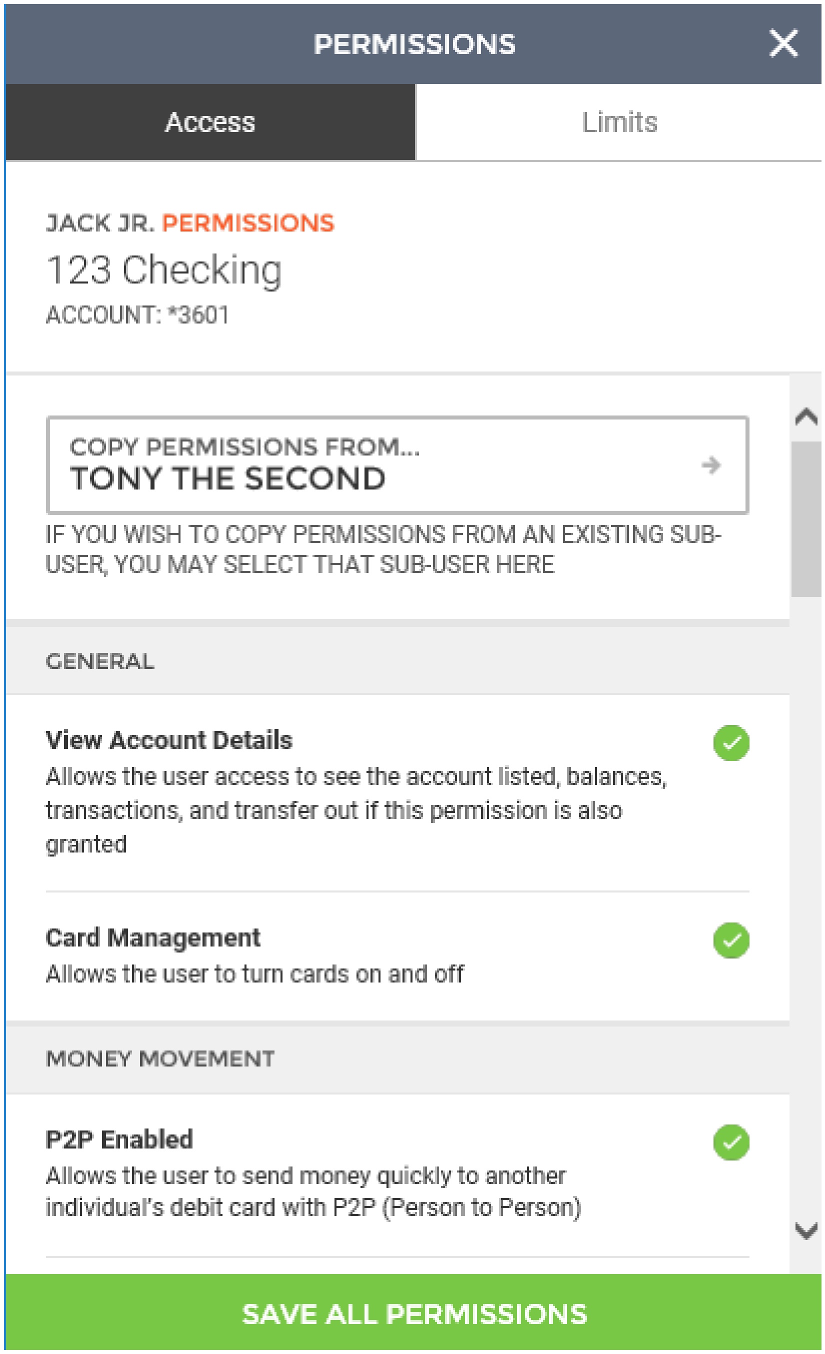
If you would like to copy permissions from another sub-user for this account, click the **Copy Permissions From** button.



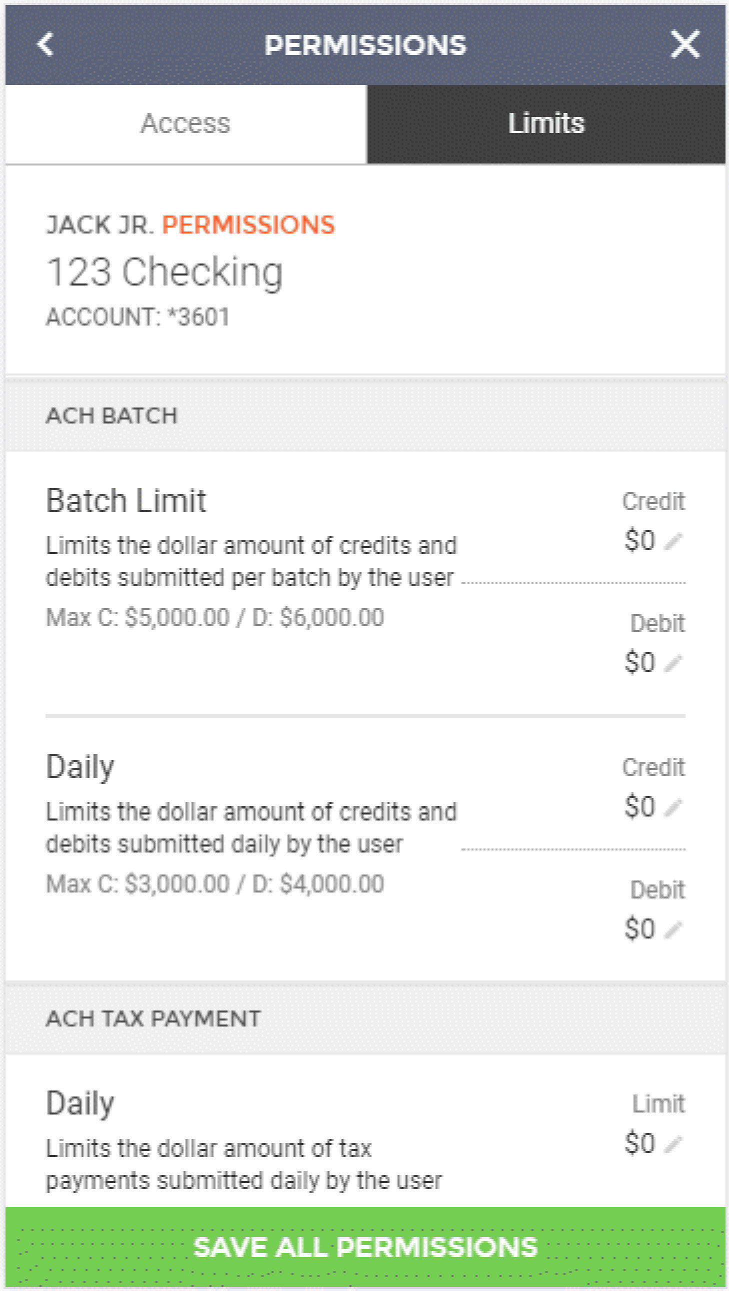
Select the sub-user you would like to use.



Their settings will be set for the sub-user being edited.

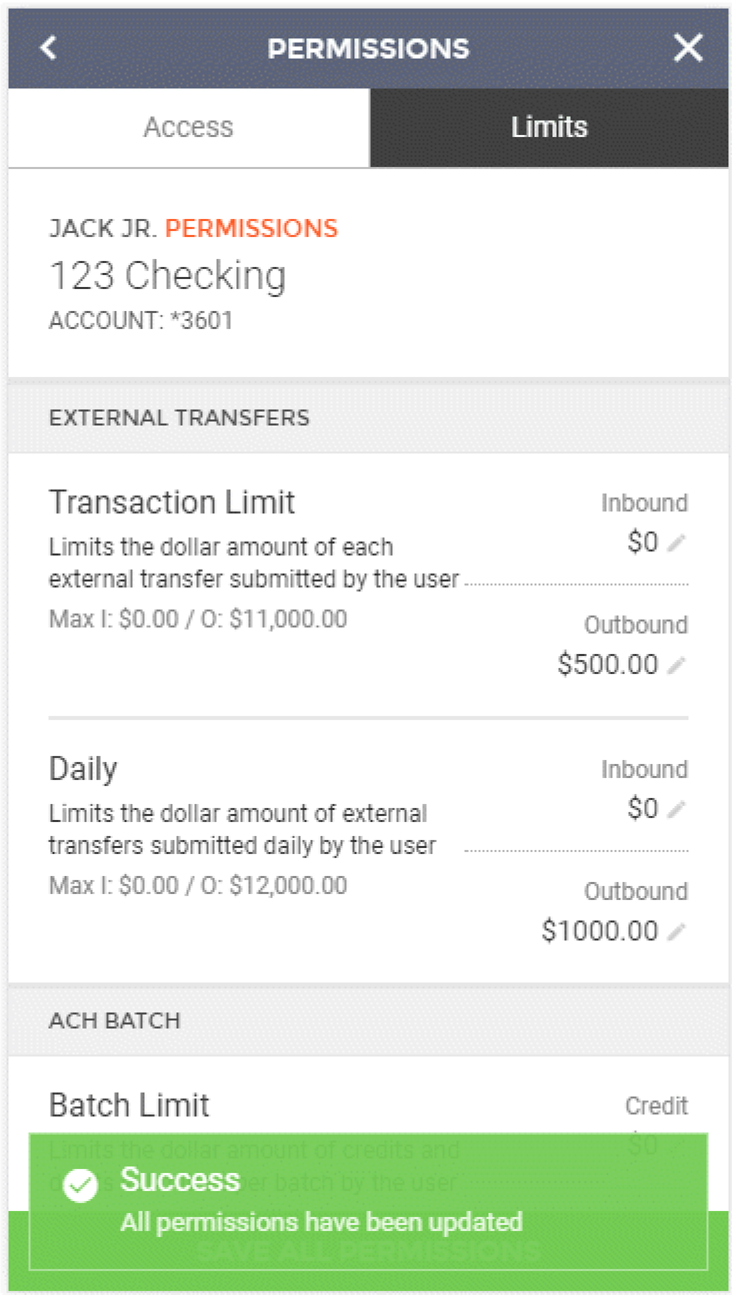


Account limits can be set by clicking **Edit** button within the credit/debit/limit field and entering the desired amount. Amounts cannot exceed the max amounts seen under each limit description.



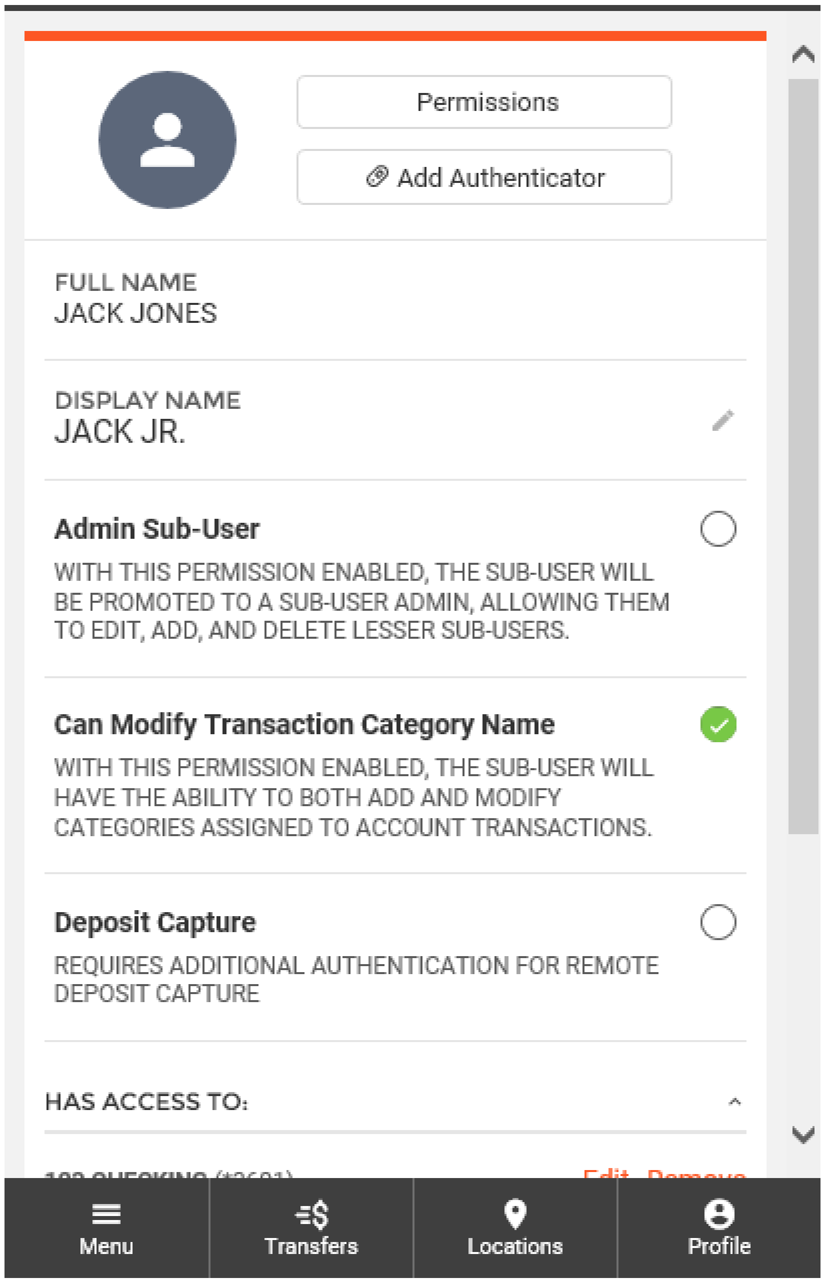
Once all changes have been made, click the **Save All Permissions** button.

A **Success** message will be displayed at the bottom of the screen.



Adding an Authenticator

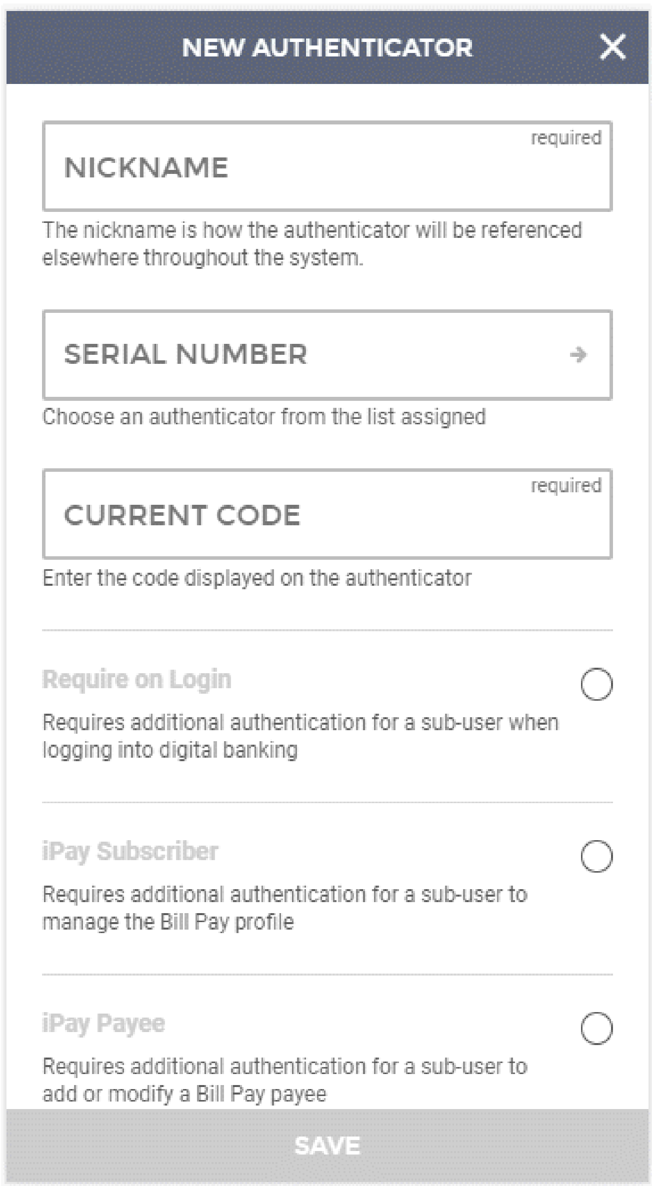
To add an authenticator to a sub-user, click the **Add Authenticator** button.



The **New Authenticator** screen will be displayed. To add an authenticator, the following fields are required:

- Nickname
- Serial Number
- Current Code

Authentication settings can be set prior to saving.



Once all changes have been made, click the **Save** button.