Online Business Banking Tutorials

Credit Union 1

Adding Sub-Users to Your Business Account

Follow the step-by-step instructions on the following pages to learn how to add sub-users to your business online banking account and assign permissions based on their roles.

User Roles: What You Need to Know

Master User (Primary Business Owner)

The master user has full control of the account, including:

- Adding and removing sub-users
- Assigning and editing permissions
- Managing account access and activity

Sub-User

Sub-users are authorized individuals granted access by the master user. Their access is fully customizable based on assigned permissions.

Why Add a Sub-User?

Adding sub-users allows you to:

- Delegate financial tasks securely
- Control access levels for employees or partners
- Streamline daily business operations

What Sub-Users Can Do

What sub-users can do depending on permissions, both master users and sub-users can:

- Send electronic funds transfers
- Access accounts based on assigned roles
- Complete transactions typically processed same-day or next-day

Before you begin make sure you have:

- Master user login credentials
- Sub-user's full name and contact information
- A clear understanding of what access they should have

Scan the QR code to access the CU1 Mobile Banking platform.

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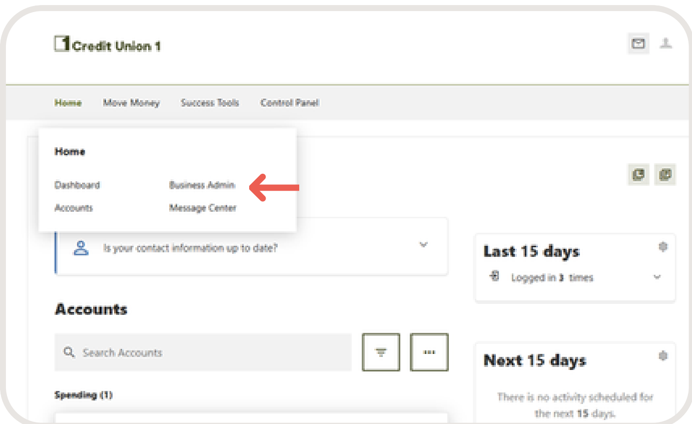
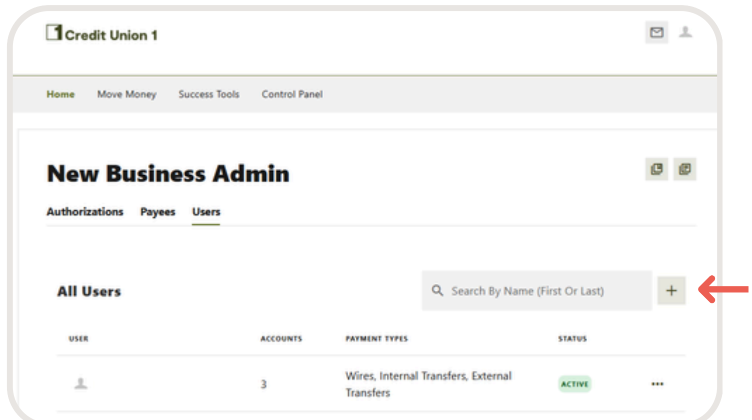
Step 1: Add a Sub-User

Log In to your CU1 business online banking account. Navigate to Business Admin under Home.

Step 2: Navigate to Business Admin + Add New User

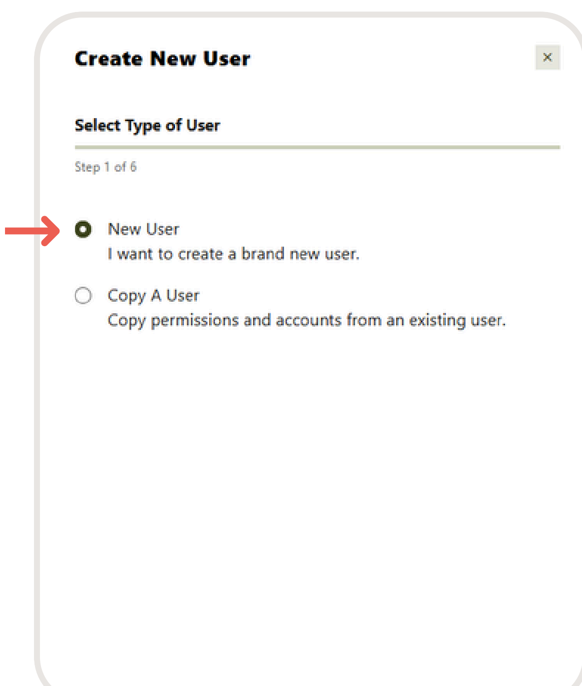
Once in the Business Admin, select Add New User. Click the plus sign symbol (+) to the right of the search box to create sub-user.

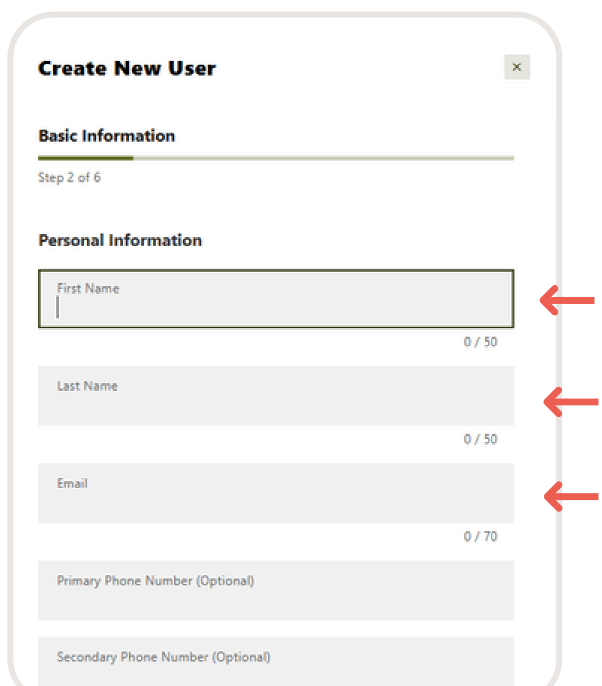




Step 3: Select Type of User + Enter User Info

Enter user details and select type of user. Input the sub-user's information as prompted.





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Step 5: Assign Permissions

Select the appropriate access and permissions based on the user's role.

Full List of User Permissions

Feature Access

- View eDocuments
- Reorder Checks
- Access Card Management

ACH and Wire Payees

- View Payees and Payment Method
- Manage Payees and Payment Method

Payment Types

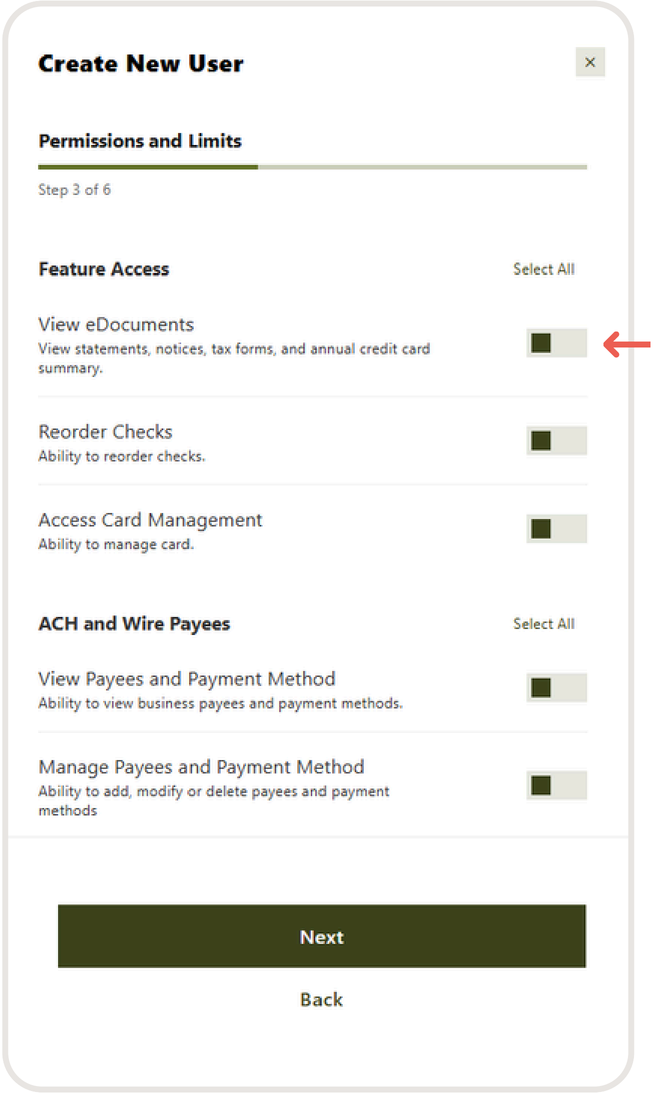
- Wires
- Internal Transfers
- External Transfers
- Bill Pay

Payment Destination

- Manage Bill Pay Payees
- Add External Transfers Account
- Add Member to Member Transfer Account

Receivables

- Remote Deposit Capture
- Manage Desktop RDC SSO



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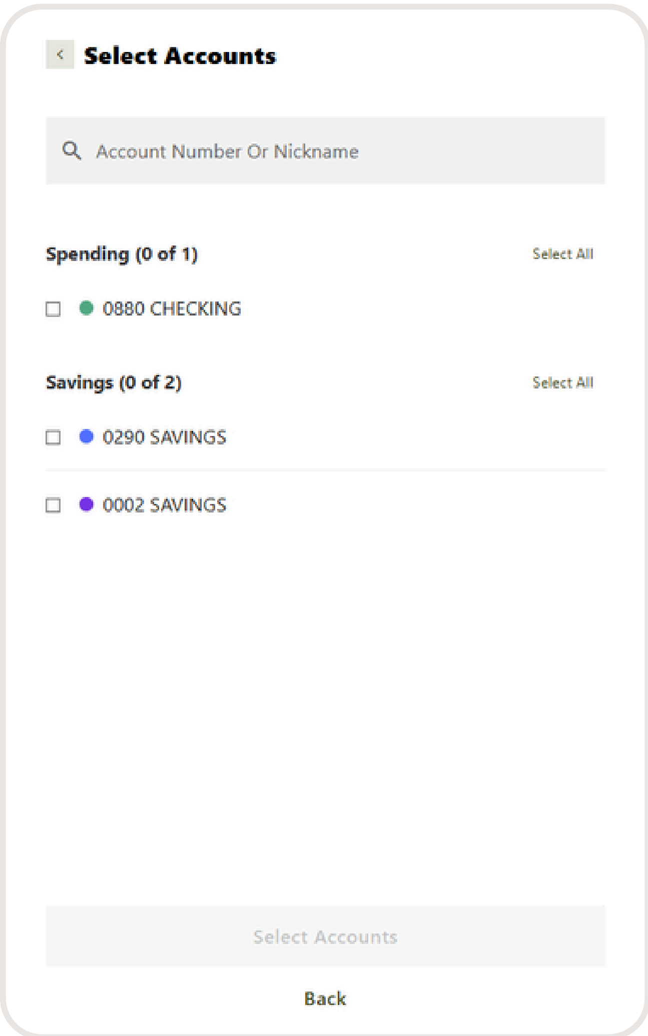
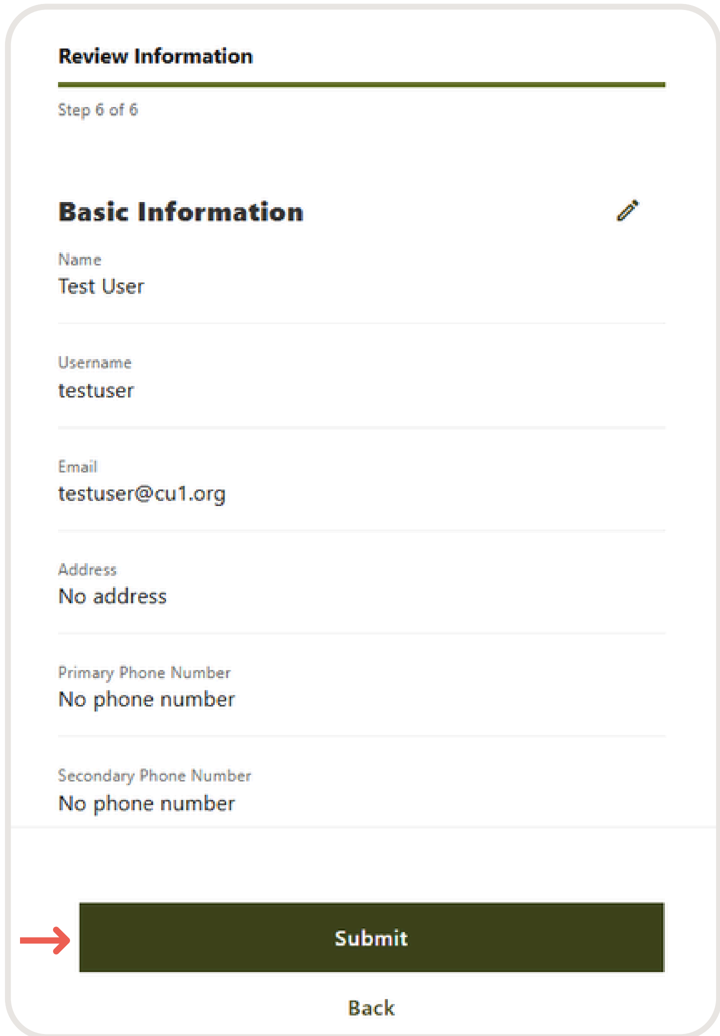
Step 6: Select Accounts

Select accounts the user should have access to.



Step 7: Review and Confirm

Review the details and permissions, then confirm to create the user.



Need Help?

If you have questions or need assistance, CU1 is here to help. Call us at 907-339-9485 or 800-478-2222 (toll-free), or visit your local branch for personalized guidance.