

## 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:

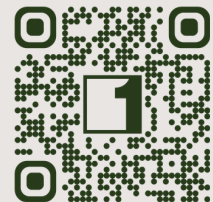
- Send electronic funds transfers
- Access accounts based on assigned roles
- Complete transactions typically processed same-day or next-day



#### 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.

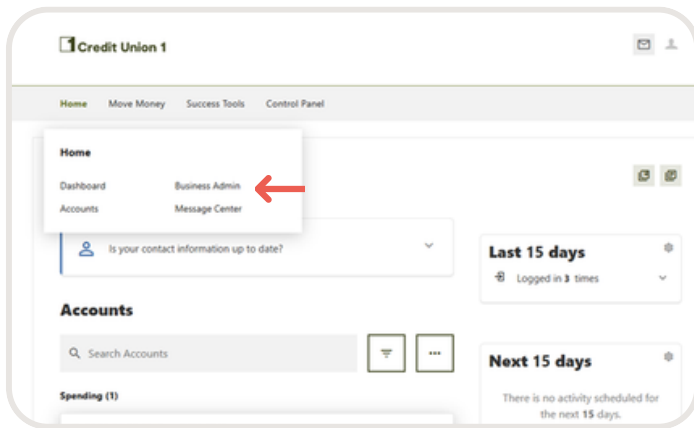


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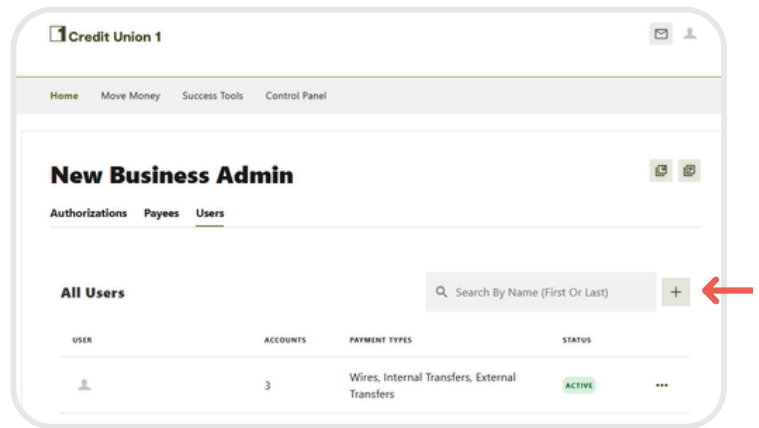
## Step 1: Add a Sub-User

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



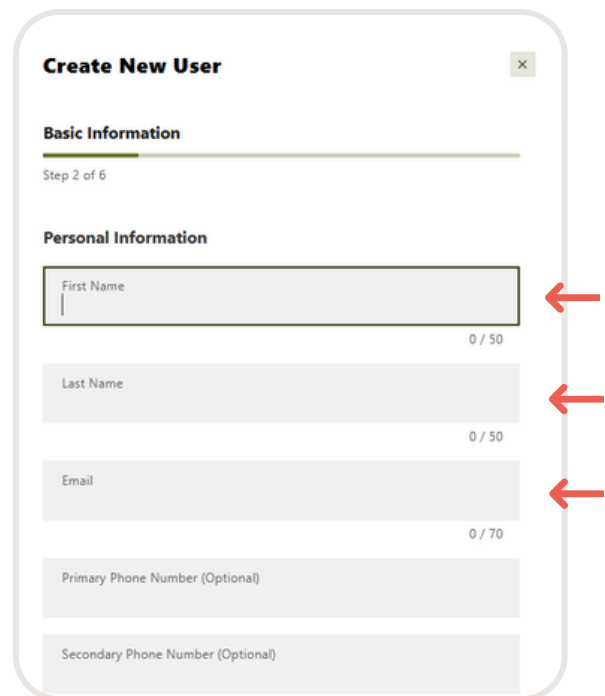
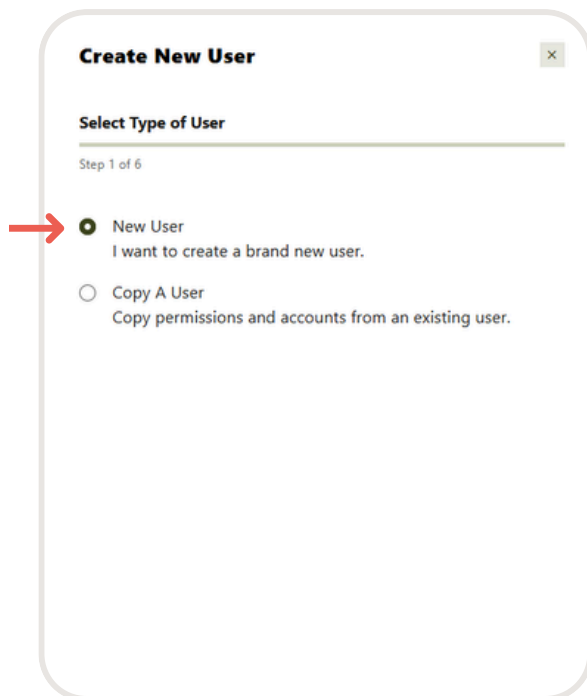
## Step 2: Navigate to Business Admin + Add New User

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

### Create New User

#### Permissions and Limits

Step 3 of 6

#### Feature Access

Select All

#### View eDocuments

View statements, notices, tax forms, and annual credit card summary.



#### Reorder Checks

Ability to reorder checks.

#### Access Card Management

Ability to manage card.

#### ACH and Wire Payees

Select All

#### View Payees and Payment Method

Ability to view business payees and payment methods.

#### Manage Payees and Payment Method

Ability to add, modify or delete payees and payment methods

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## Step 6: Select Accounts

Select accounts the user should have access to.

The screenshot shows the 'Select Accounts' screen. At the top, there is a search bar with the placeholder text 'Account Number Or Nickname'. Below the search bar, there are two sections: 'Spending (0 of 1)' and 'Savings (0 of 2)'. Each section has a 'Select All' link. Under 'Spending', there is one account listed: '0880 CHECKING' with an unchecked checkbox. Under 'Savings', there are two accounts listed: '0290 SAVINGS' and '0002 SAVINGS', both with unchecked checkboxes. At the bottom of the screen, there is a 'Select Accounts' button and a 'Back' button.

## Step 7: Review and Confirm

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

The screenshot shows the 'Review Information' screen. At the top, there is a title 'Review Information' and a subtitle 'Step 6 of 6'. Below this, there is a section titled 'Basic Information' with an edit icon. The fields are: 'Name' (Test User), 'Username' (testuser), 'Email' (testuser@cu1.org), 'Address' (No address), 'Primary Phone Number' (No phone number), and 'Secondary Phone Number' (No phone number). At the bottom, there is a 'Submit' button with a red arrow pointing to it, and a 'Back' button.

## 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.