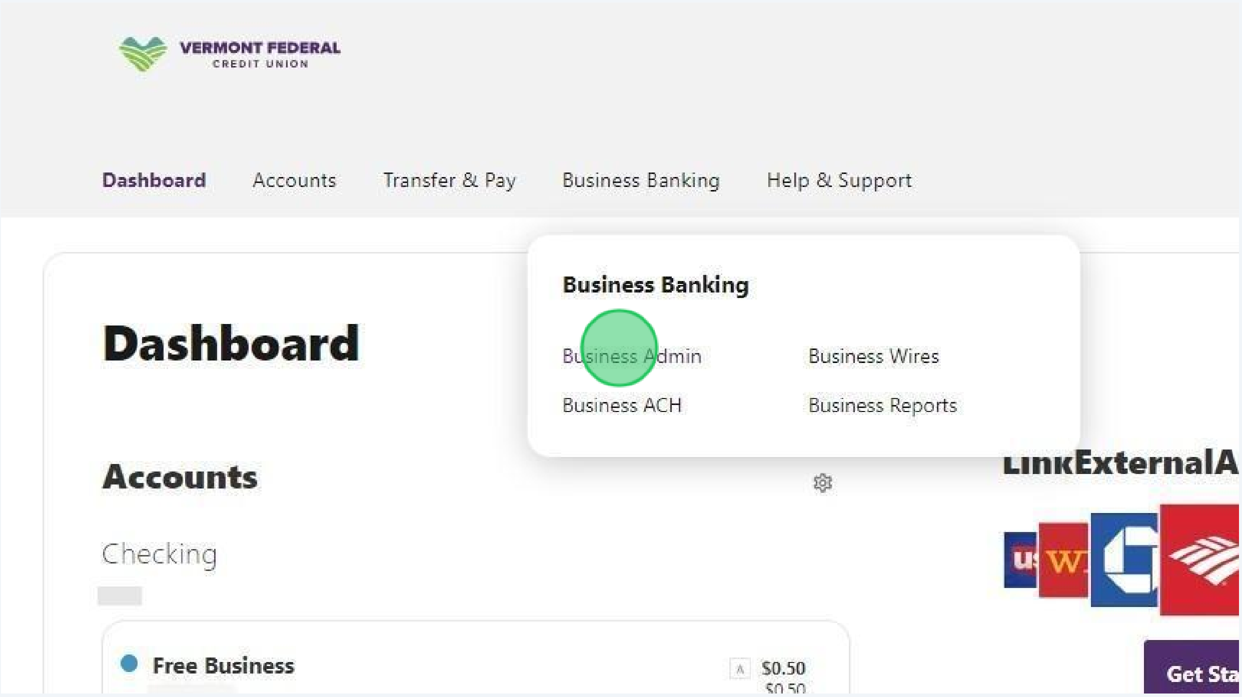
Getting Started: Create A New Business Sub User

Create A New Business Sub User

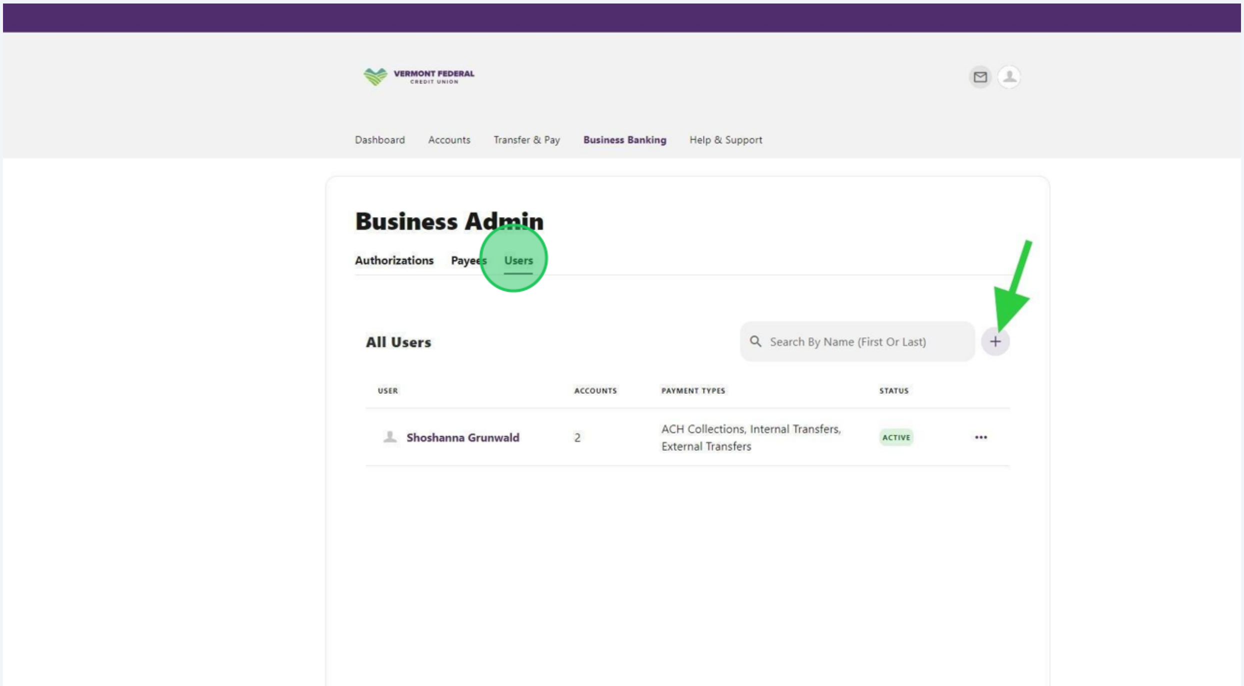
1 Log In to Your Account

- Navigate to the Login Page: Vermont Federal Credit Union
- Navigate to the **Business Banking** tab.
- Click on **Business Admin**



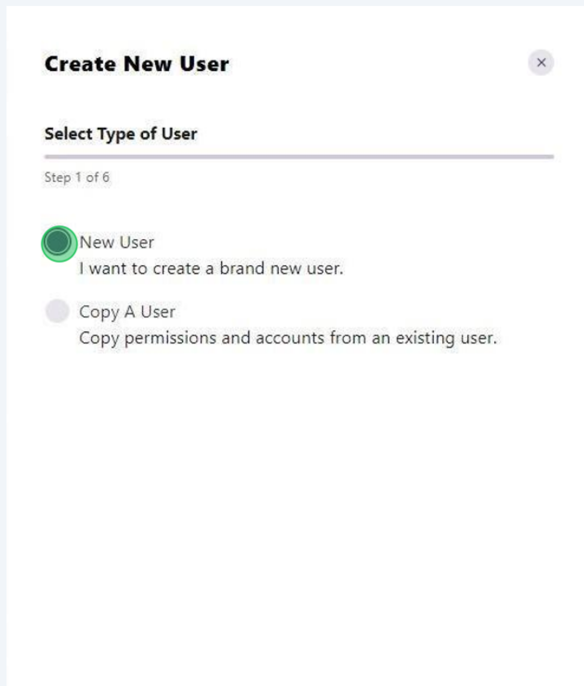
2 Adding New Business Users

- Click the **Users** tab
- Click the **+** button to Add a New User



3 Adding New Business Users

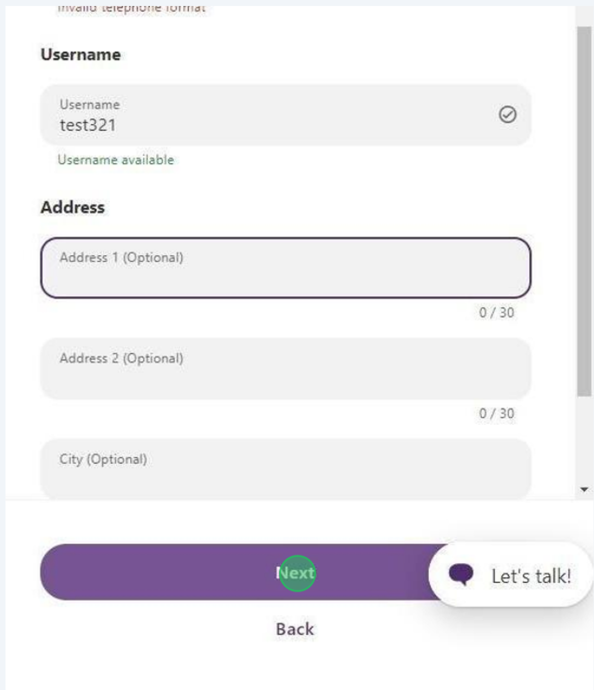
- Select the **New User** option
- Then click the **Next** button



Warning! You will need to verify that the username is not already in use. You do this by entering the text of the username, then pressing the arrow on the right side of the field. If you do not complete this step the "Next" button will not be selectable and you will not be able to move forward in the process.

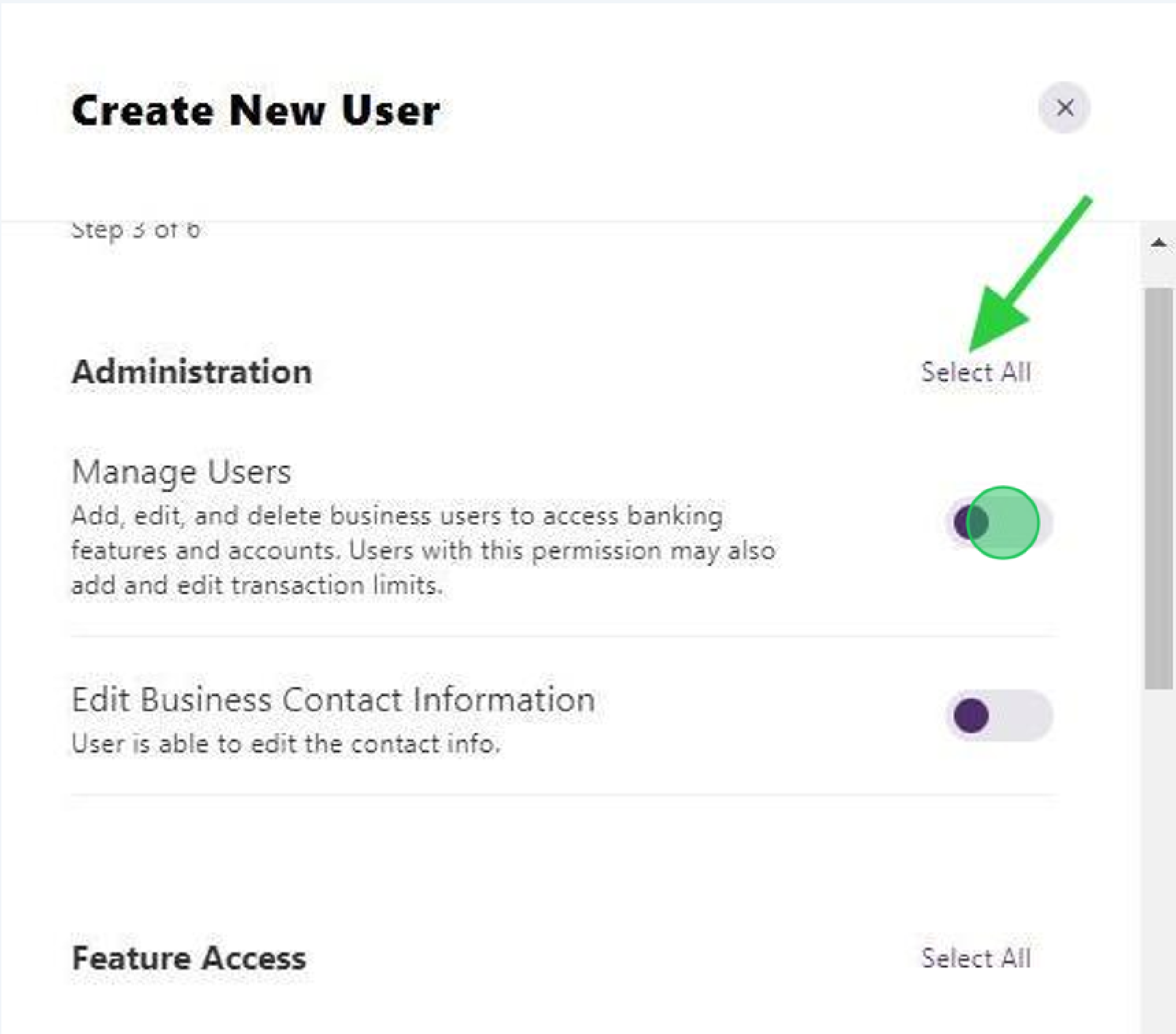
5 Adding New Business Users

- Fill out all **Required** fields
- Fill out any **Optional** fields if needed
- Click the **Next** button



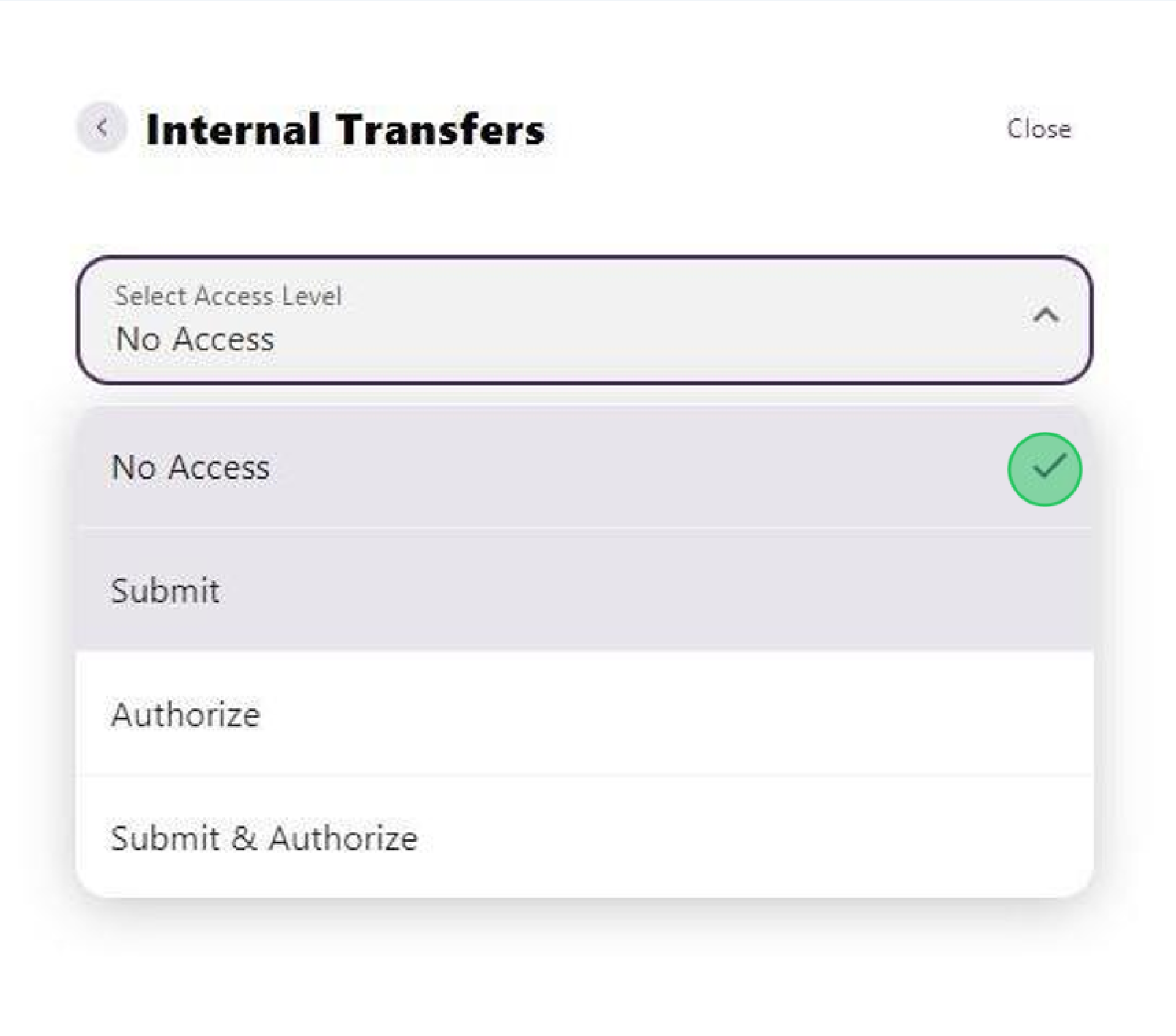
6 Setting Business User Permissions

- Select which permissions are applicable to your user using the sider buttons
- If all the permissions in a section apply, you can use the **Select All** button



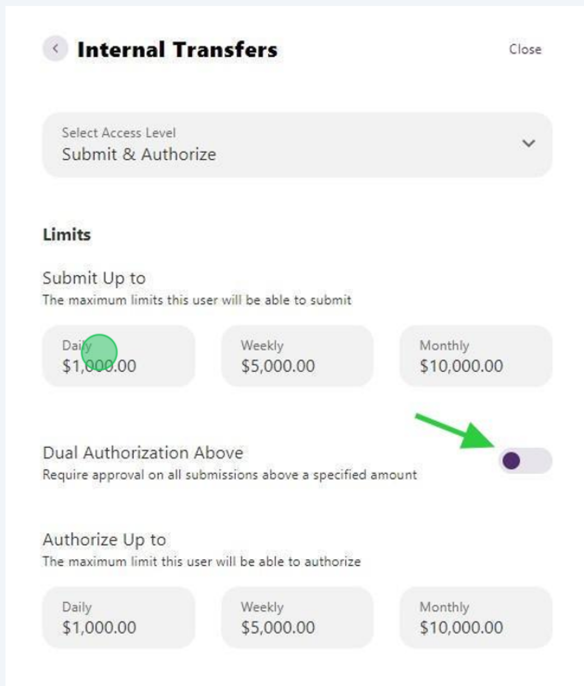
7 Setting Business User Access Levels

- **No Access** - User cannot make actions
- **Submit** - User can submit transfers
- **Authorize** - User can authorize transfers
- **Submit & Authorize** - User can submit and authorize transfers



8 Setting Business User Limits

- Users with **Submission** and **Authorization** access require limits to be set
- Limits are set **Daily**, **Weekly**, and **Monthly**
- **You** can also require **Dual Authorization**



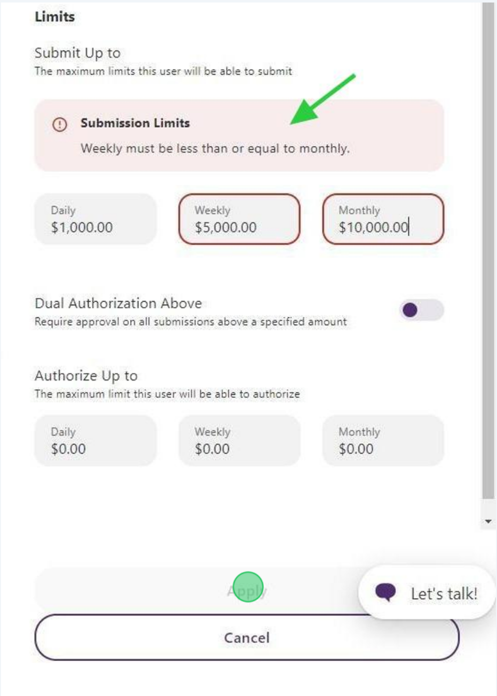
9

Setting Business User Limits

- **Note:** The system will display a warning message if you fill out limits left to right as **Daily** limits cannot be lower than **Weekly** or **monthly** limits

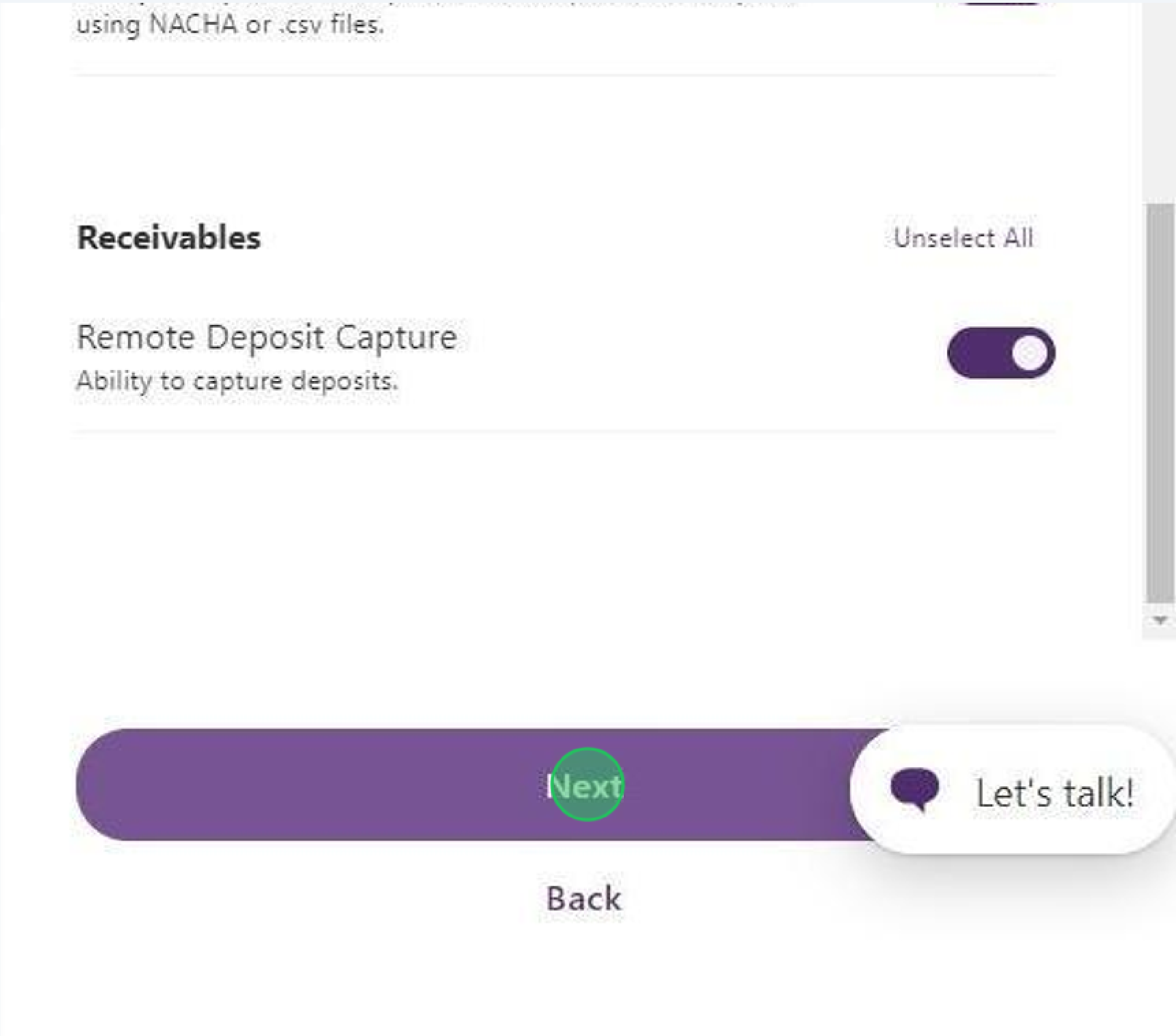
- This message will clear once all fields have been properly defined

- Once you have defined all applicable limits select **Apply**



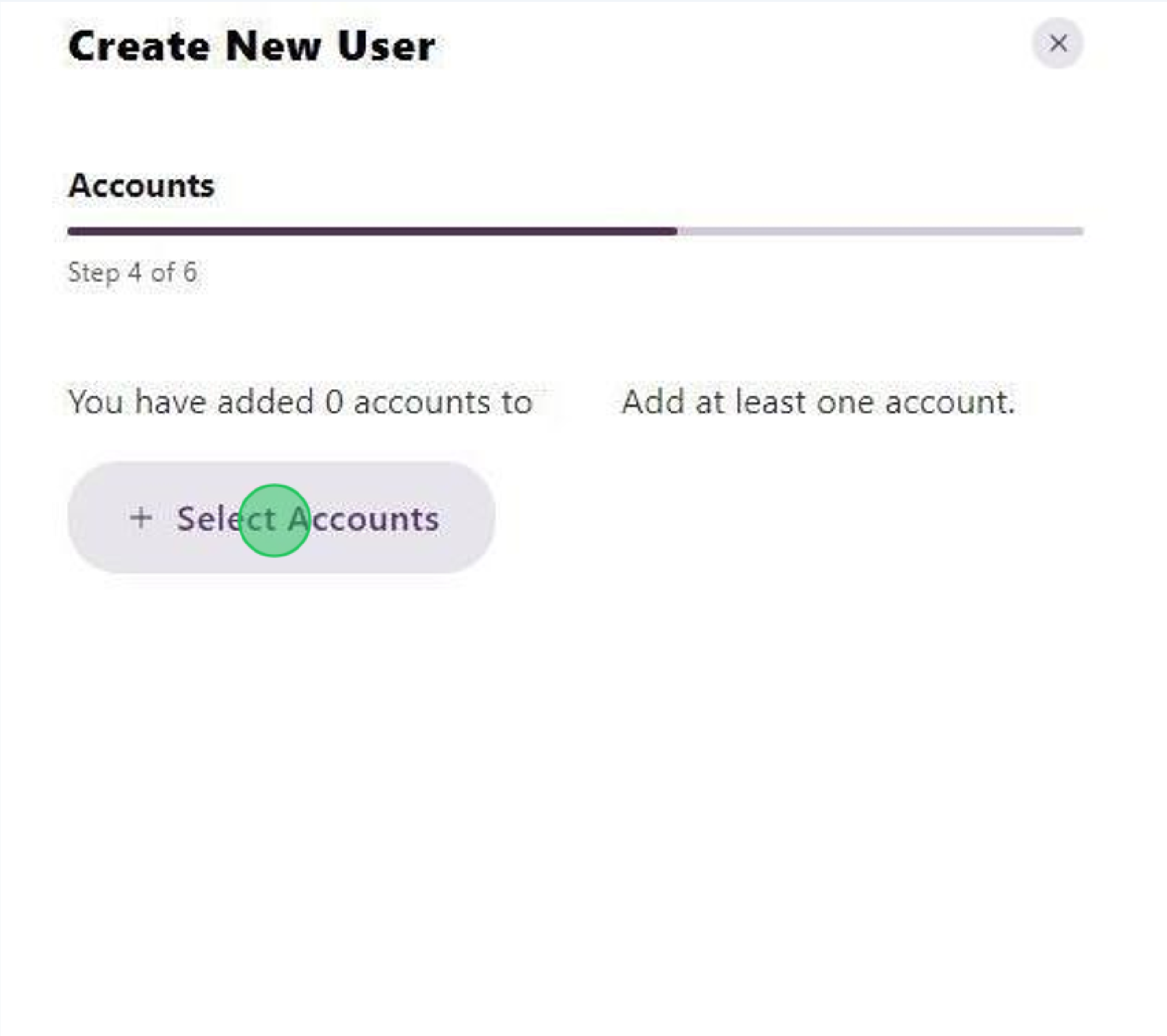
10 Setting Business User Limits

- Once you have selected all applicable permissions select **Next**



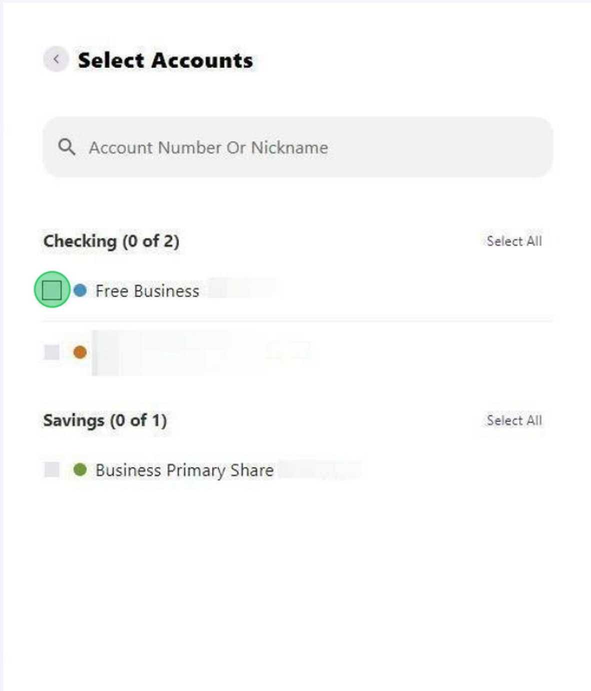
11 **Adding Users to Business Accounts**

- Next you will need to grant the user access to the individual accounts that they will need.



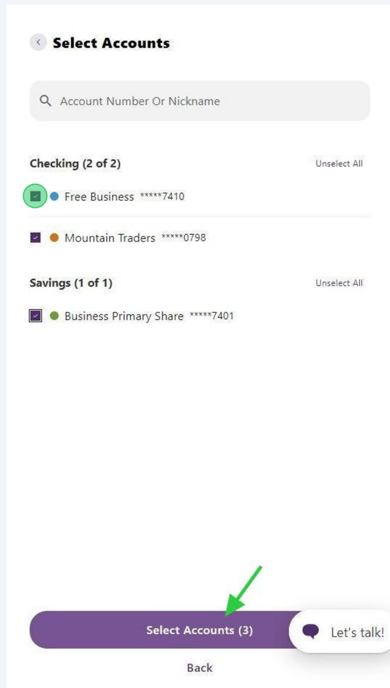
12 Adding Users to Business Accounts

- Select all the accounts the user should have access to
- Once complete, click **Select Accounts**



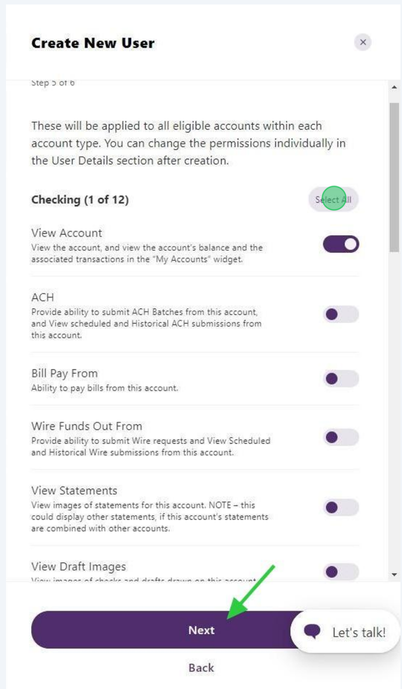
13 Adding Users to Business Accounts

- Select all the accounts the user should have access to
- Once Complete, click **Select Accounts**
- **Note:** The number in parenthesis indicates how many accounts you selected



14 Setting Business Account Permissions

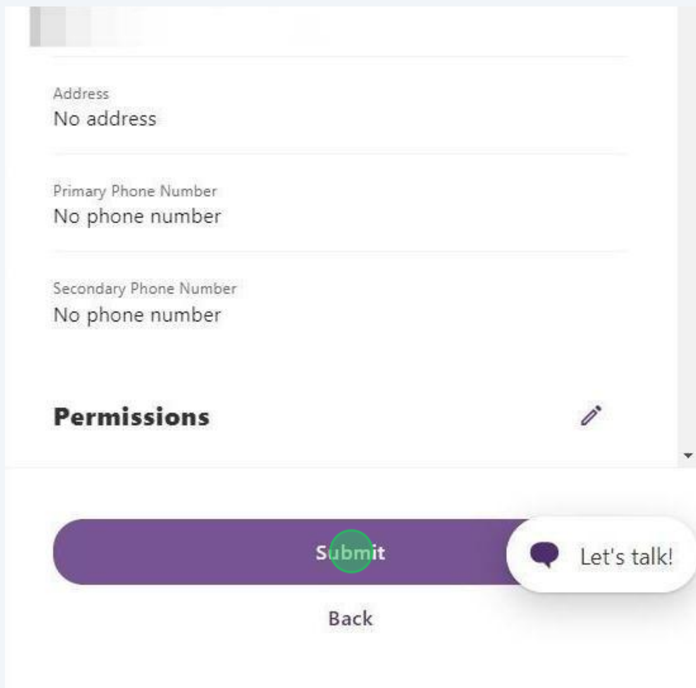
- Select the account permissions using the sider buttons
- If all the permissions in a section apply, you can use the **Select All** button
- Once complete, click **Next**



Tip! You can change the permissions for accounts individually in the **User Details** section after you have finished creating the user's account.

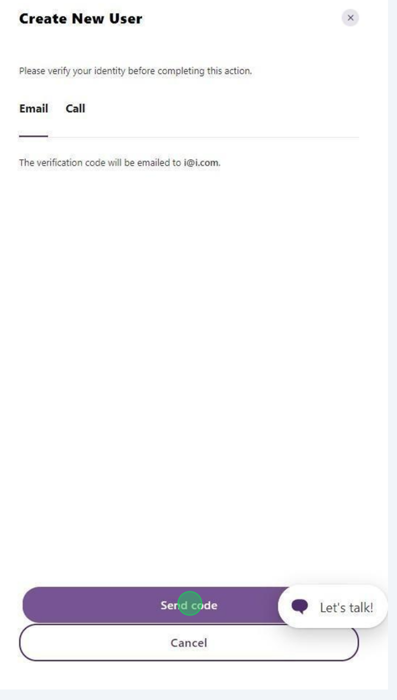
15 Creating a New Business User

- Review all user account information
- Select the pencil icon next to any section if you need to make updates
- Select **Submit** when complete



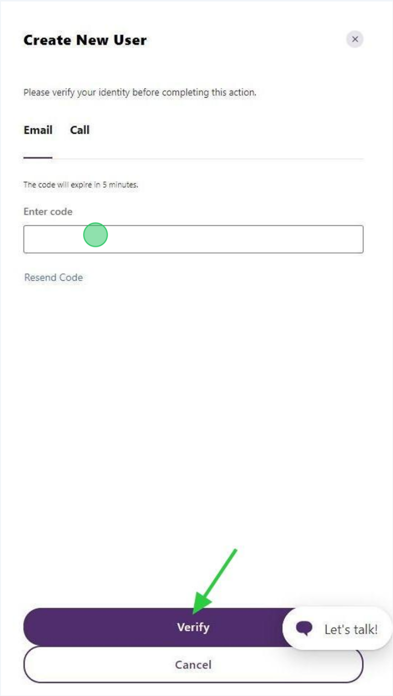
16 Verifying Your Identity

- Click "**Send Code**"
- This will send the master user a two-factor authentication code to verify
- Select either **Email** or **Call**



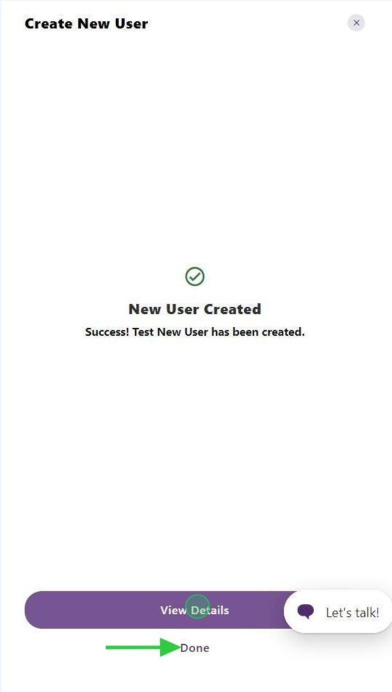
17 Verifying Your Identity

- Enter the code that was sent to via **Email** or **Call**
- If you have an issue, can click **Resend Code**
- Once complete, click **Verify**



18 Reviewing New Business Users

- Click **View Details** to navigate directly to the new user's account
- Click **Done** if you are finished creating the account.

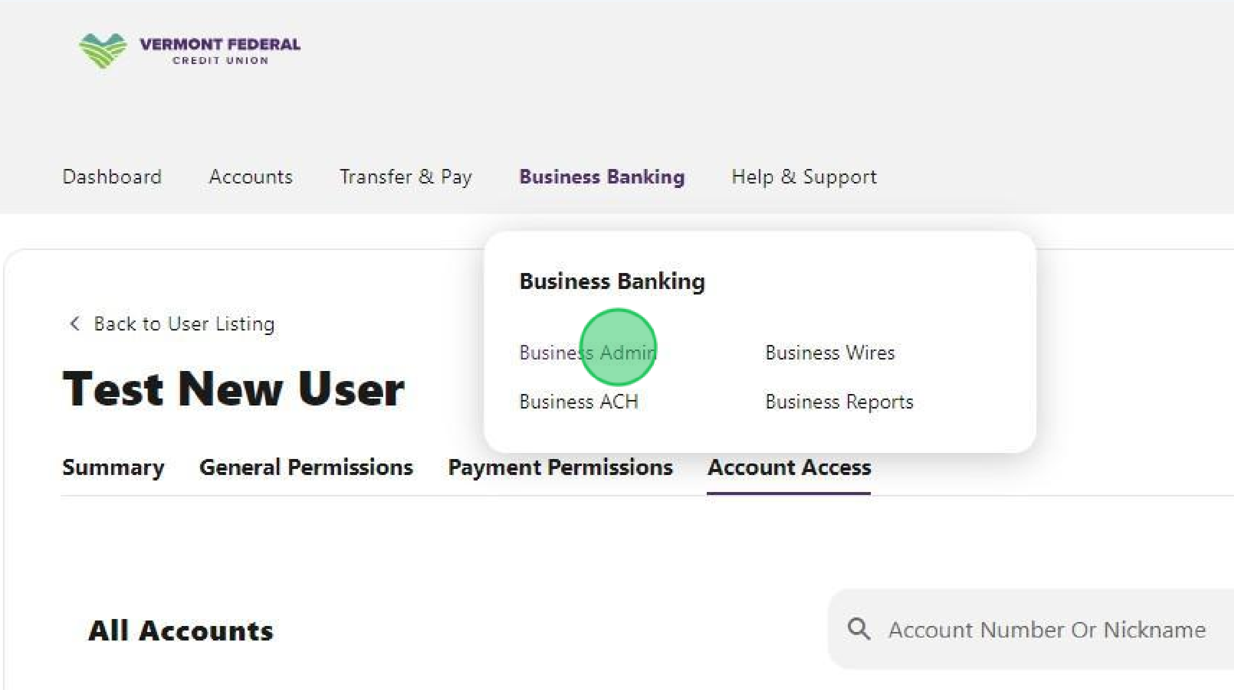


Tip! If you need to change the permissions for accounts individually use the view details section here, which selects the user you just created. Alternatively, if you need to do this at any time after user setup you can navigate to **Business Banking > Business Admin > Users > Select User's Name > Account Access.**

Copy An Existing User to Make A New User

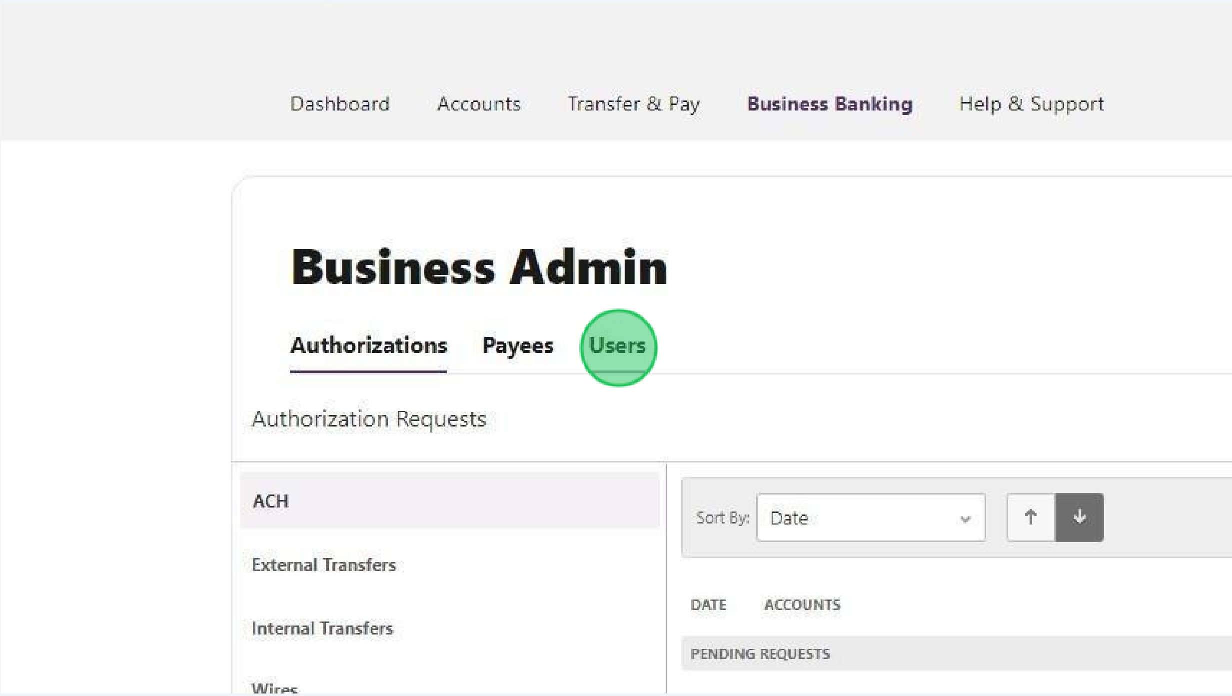
19 Log In to Your Account

- Navigate to the Login Page: Vermont Federal Credit Union
- Navigate to the **Business Banking** tab.
- Click on **Business Admin**



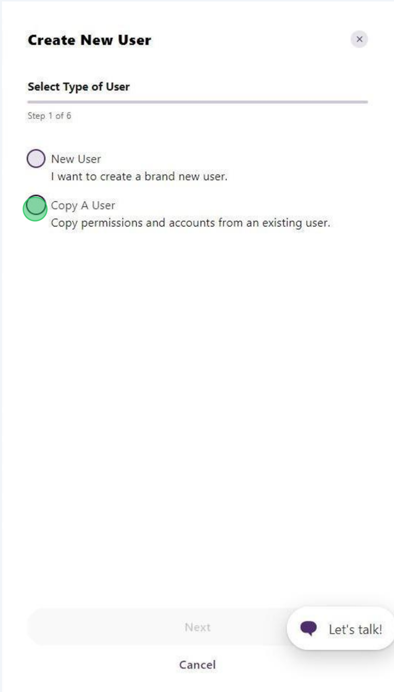
20 Copying Existing Business Users

- Click the **Users** tab
- Click the **+** button to **Copy a User**



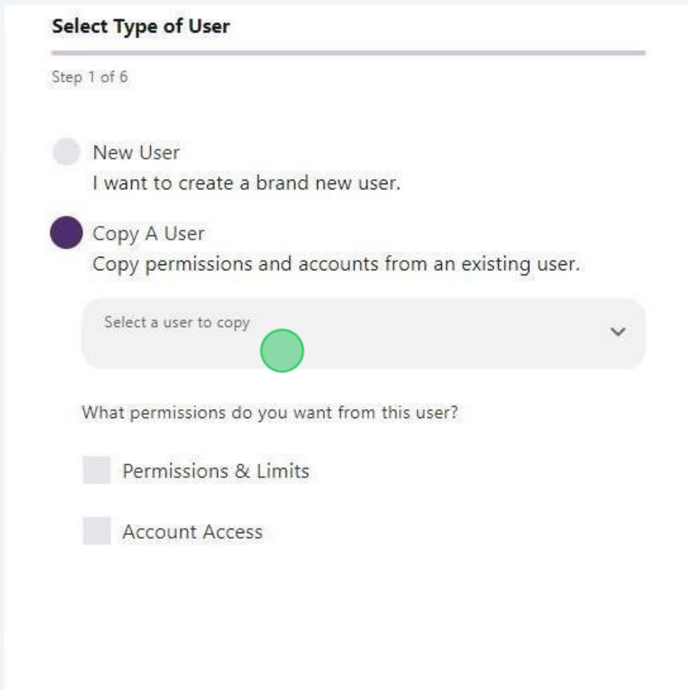
21 Copying Existing Business Users

- Select the **Copy a User** option
- Then click the **Next** button



22 Copying Existing Business Users

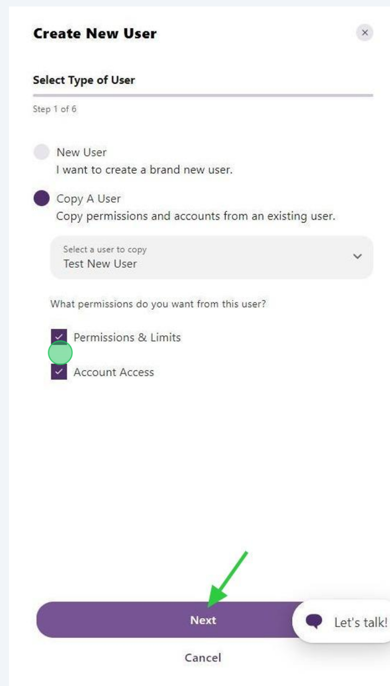
- Select the **Copy a User** option
- Select the user you would like to copy from the dropdown menu
- Then click the **Next** button



23 Copying User Permissions, Limits, & Access

• Select if you would like to copy **Permissions & Limits** and/or **Account Access** of the selected user.

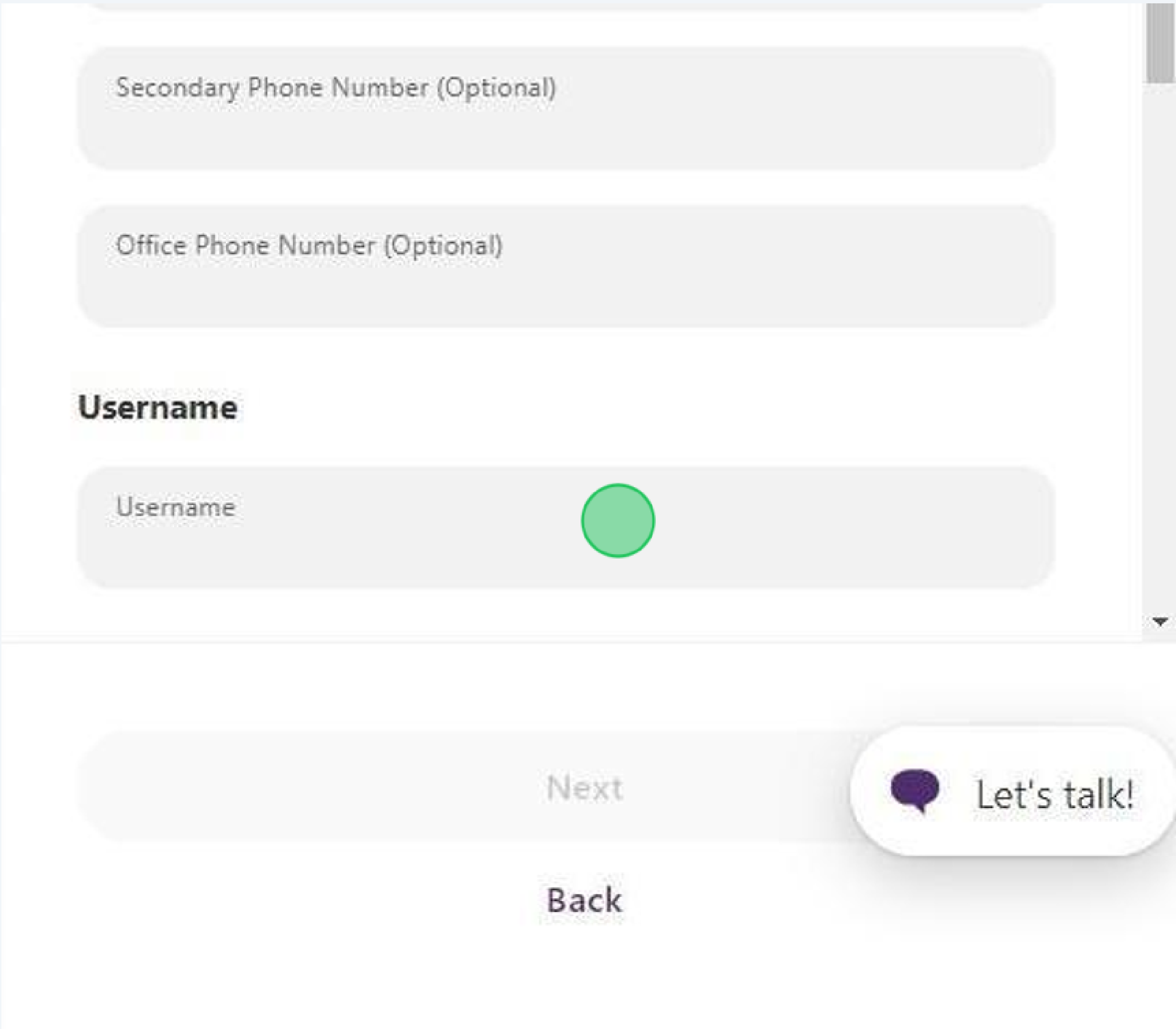
• Click **Next**



24

Copying Existing Business Users

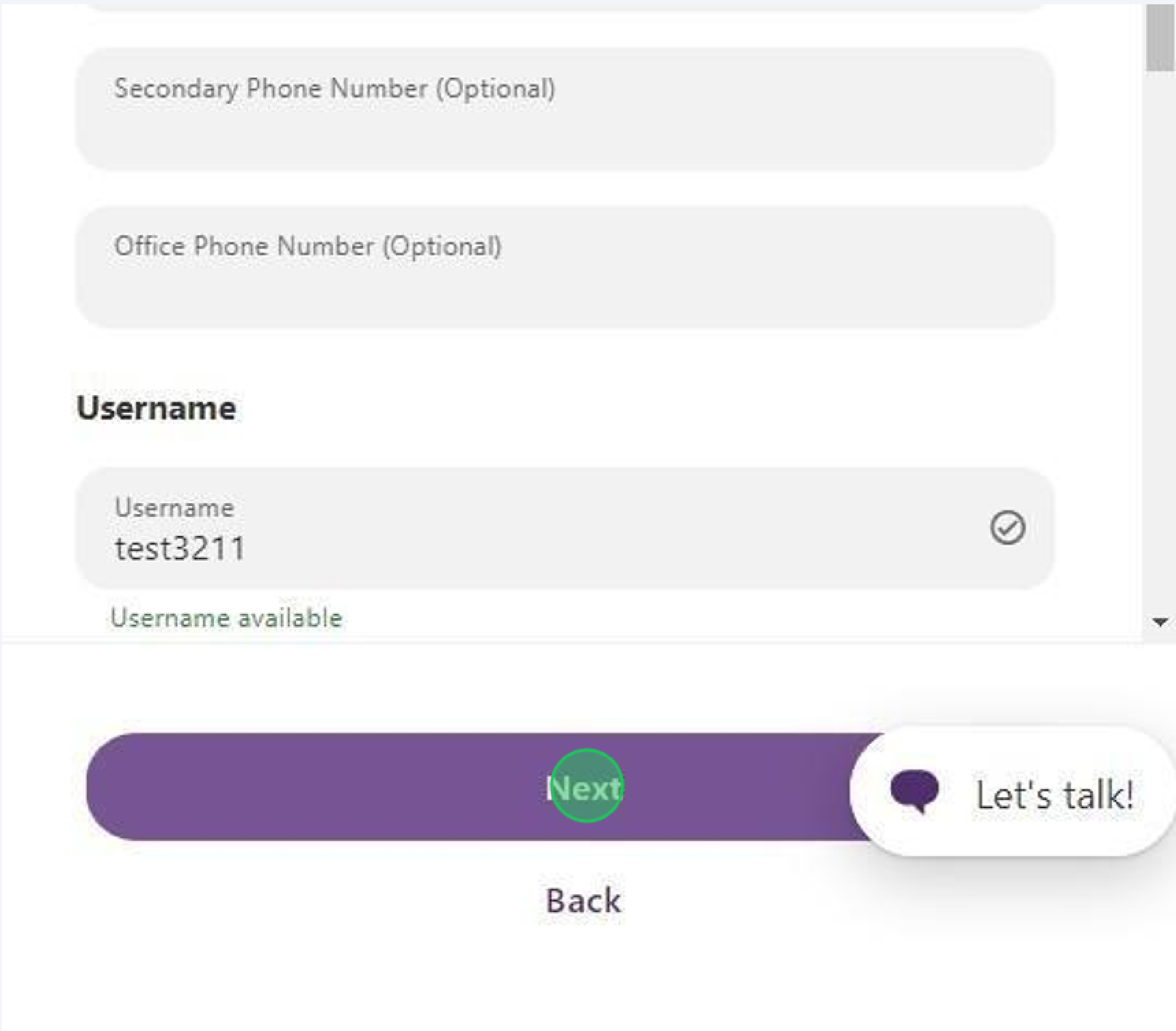
• The only required fields you will need to fill out for a copied user are **First Name**, **Last Name**, and **Username**



Warning! You will need to verify that the username is not already in use. You do this by entering the text of the username, then pressing the arrow on the right side of the field. If you do not complete this step the **Next** button will not be selectable and you will not be able to move forward in the process.

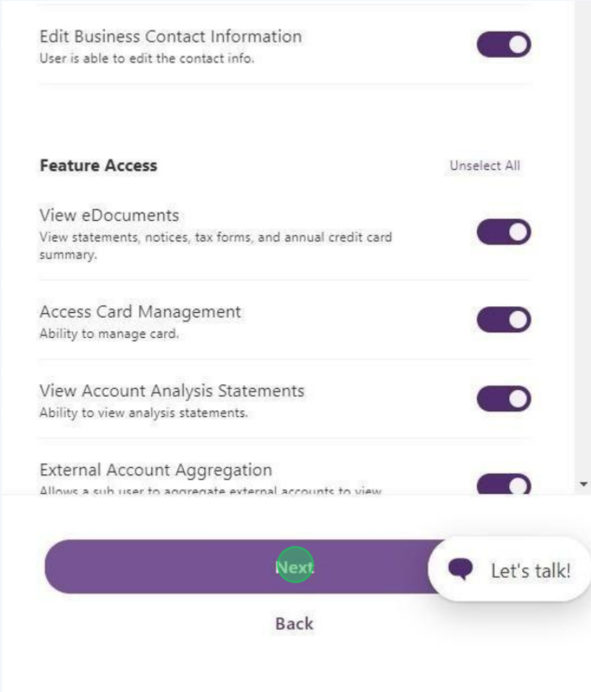
26 Copying Existing Business Users

- Fill out all **Required** fields
- Fill out any **Optional** fields if needed
- Click the **Next** button



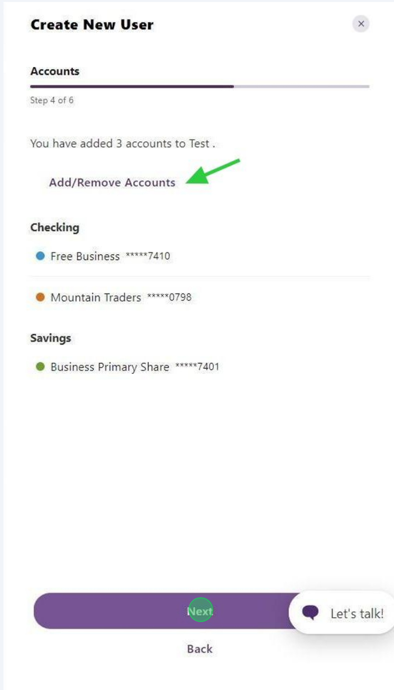
27 Setting Copied User Permissions

- Review the user permissions and make any necessary changes
- Then select **Next**



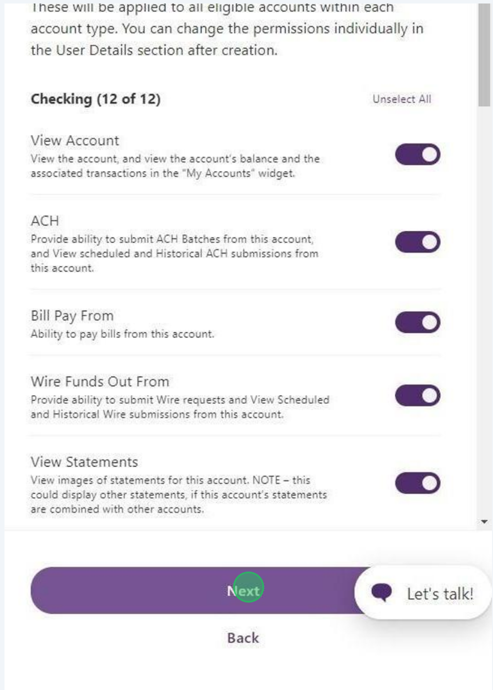
28 Adding Copied Users to Business Accounts

- Update any account access by clicking **Add/Remove Accounts**
- Then select **Next**



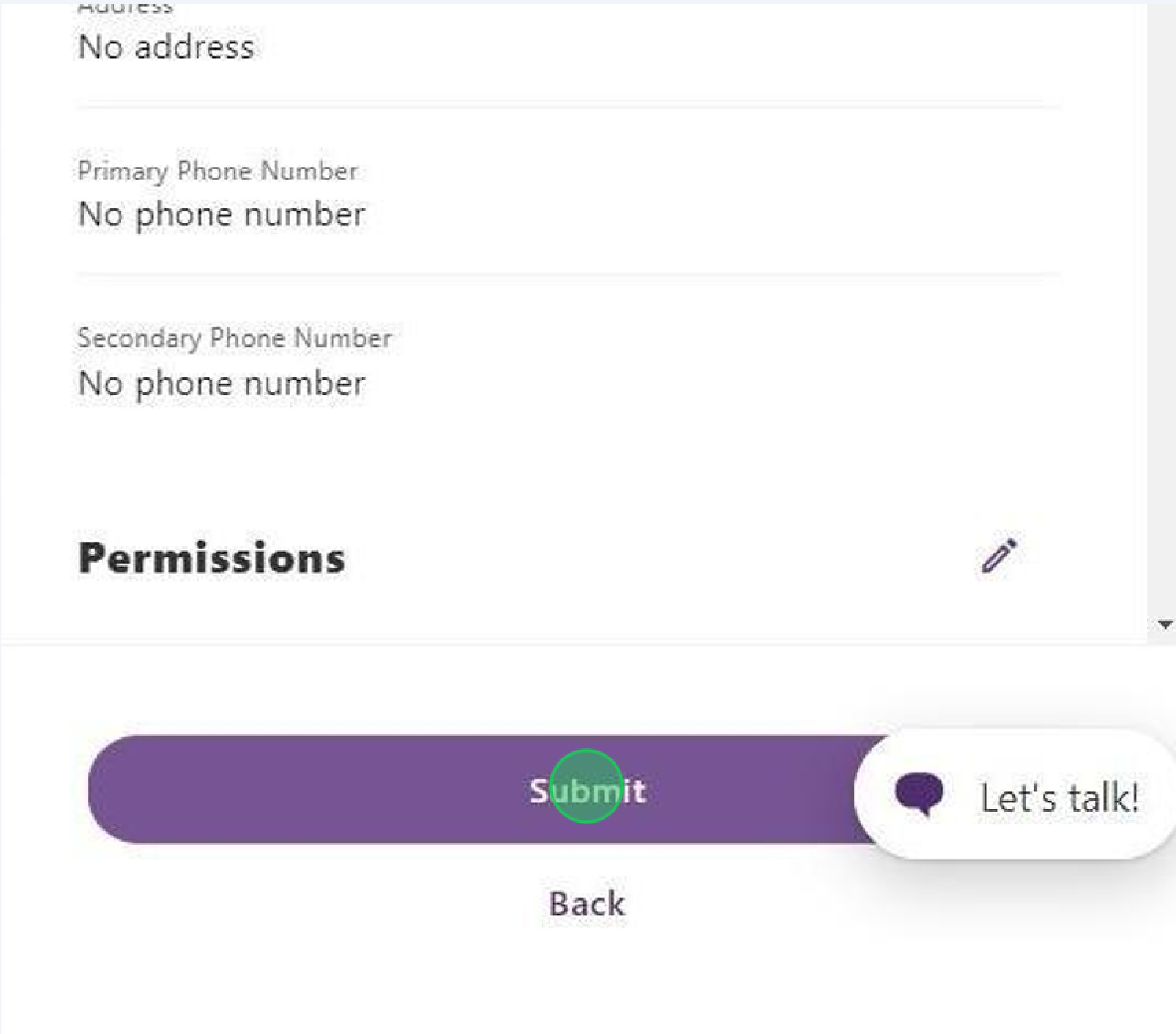
29 Setting Business Account Permissions

- Make any necessary updates to the account permissions.
- Once complete, click **Next**



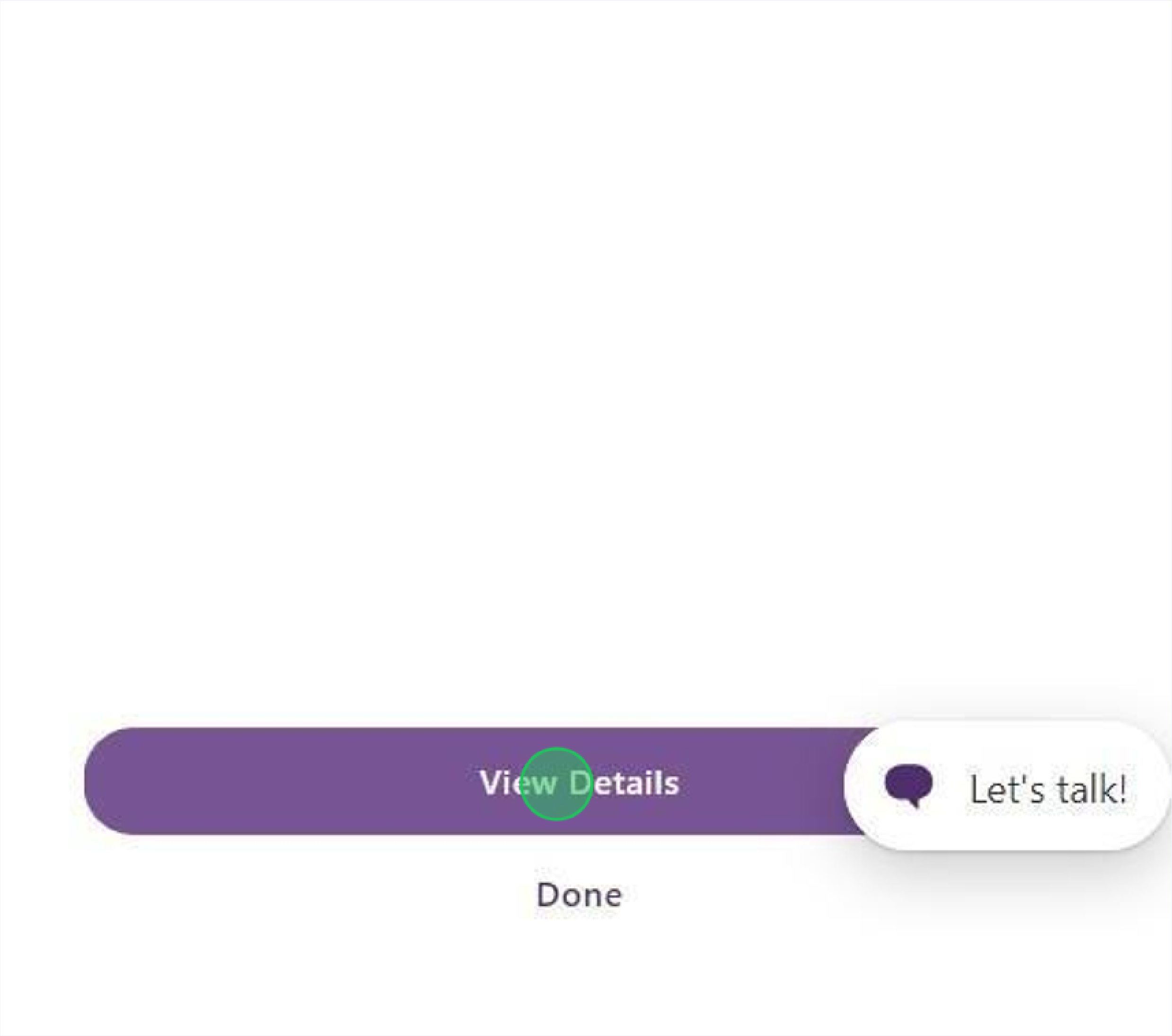
30 **Copying a Business User**

- Review all user account information
- Select the pencil icon next to any section if you need to make updates
- Select **Submit** when complete



31 **Reviewing Copied Business Users**

- Click **View Details** to navigate directly to the new user's account
- Click **Done** if you are finished creating the account.



Tip! If you need to change the permissions for accounts individually use the view details section here, which selects the user you just created. Alternatively, if you need to do this at any time after user setup you can navigate to **Business Banking > Business Admin > Users > Select User's Name > Account Access.**