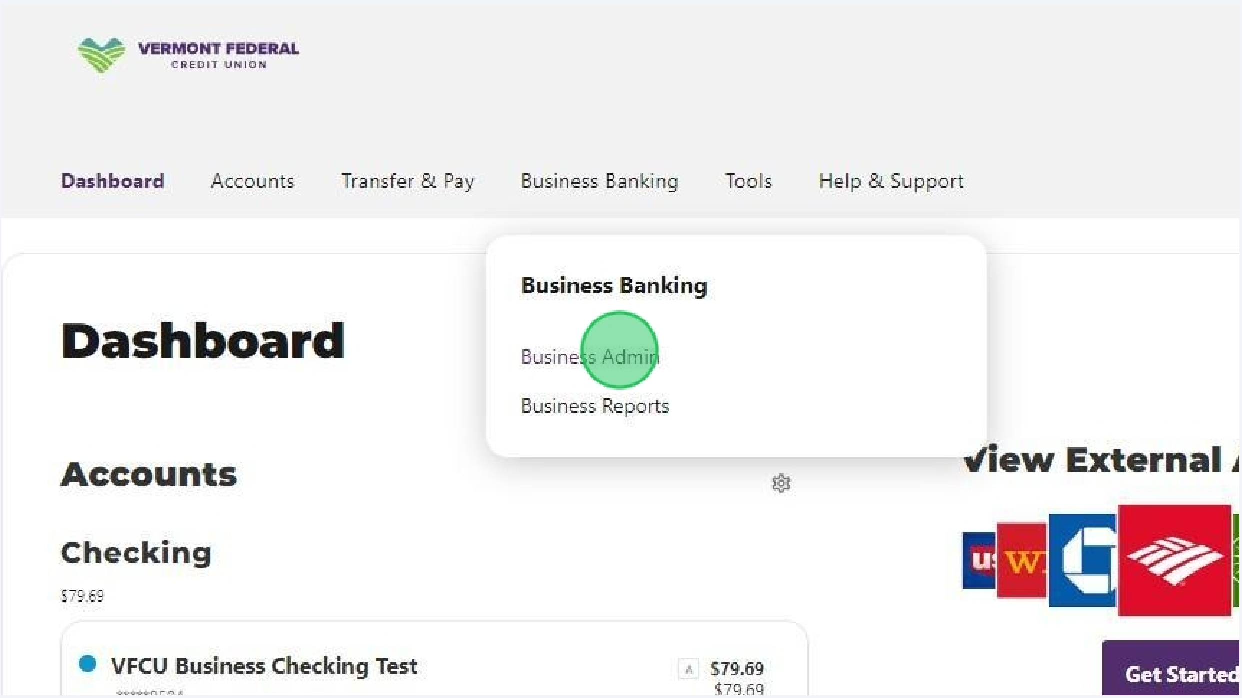
Getting Started: How to Create or Give Access to a Sub User

1 Step 1: Log into Your Business Account

1. Log into your business account using your credentials via the online banking.online.vermontfederal.org

2. Navigate to and click on "**Business Banking**" then select "**Business Admin**" and click on "**Users**."



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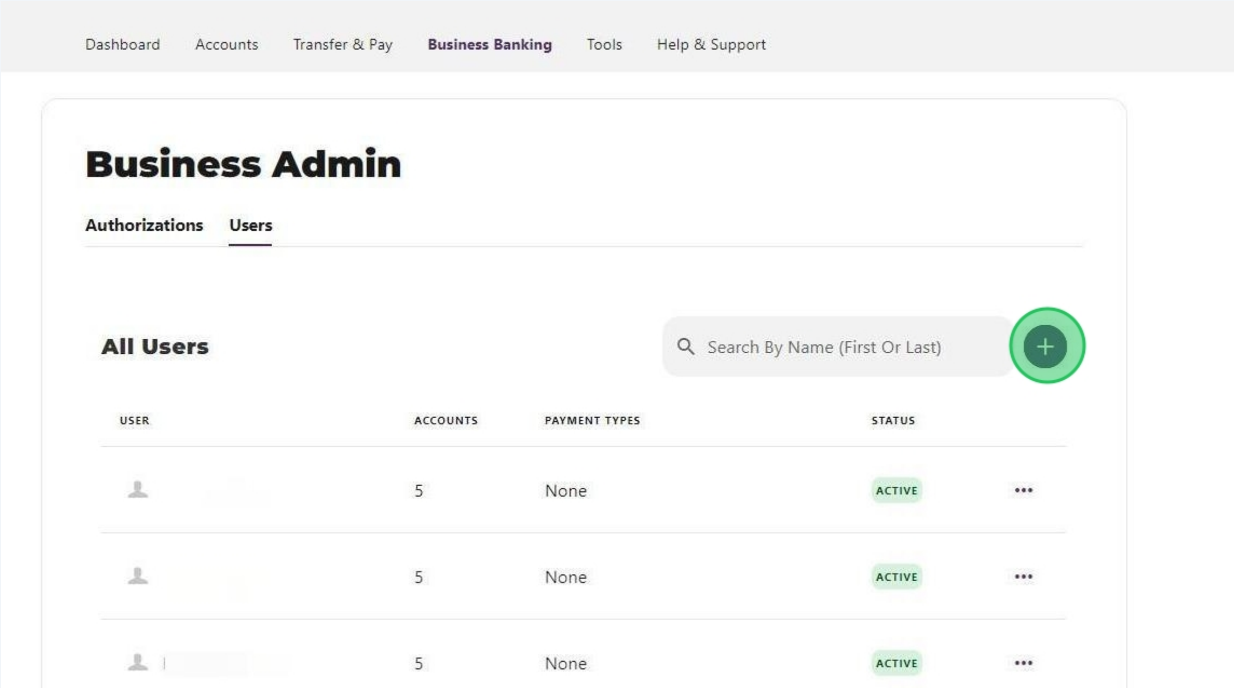
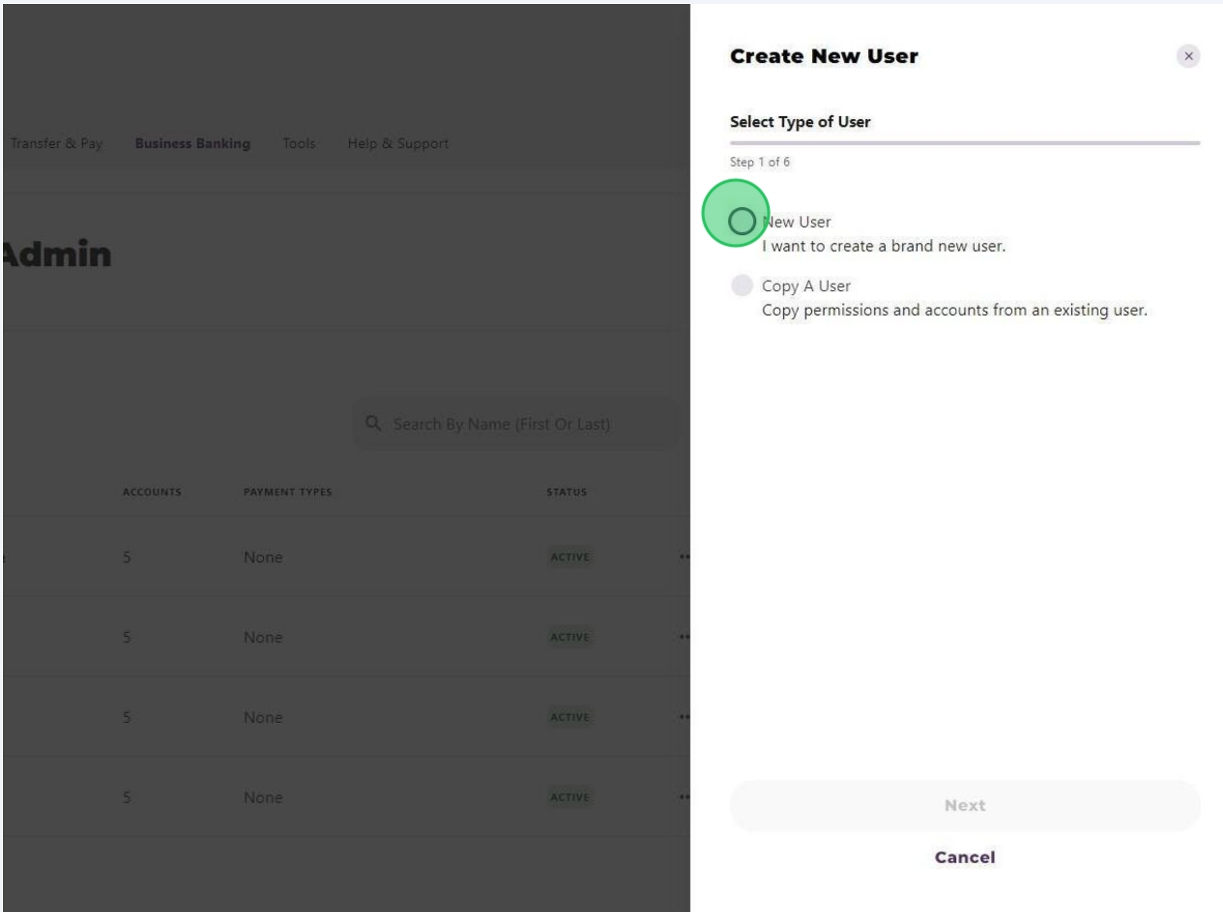
Step 2: Add a New User

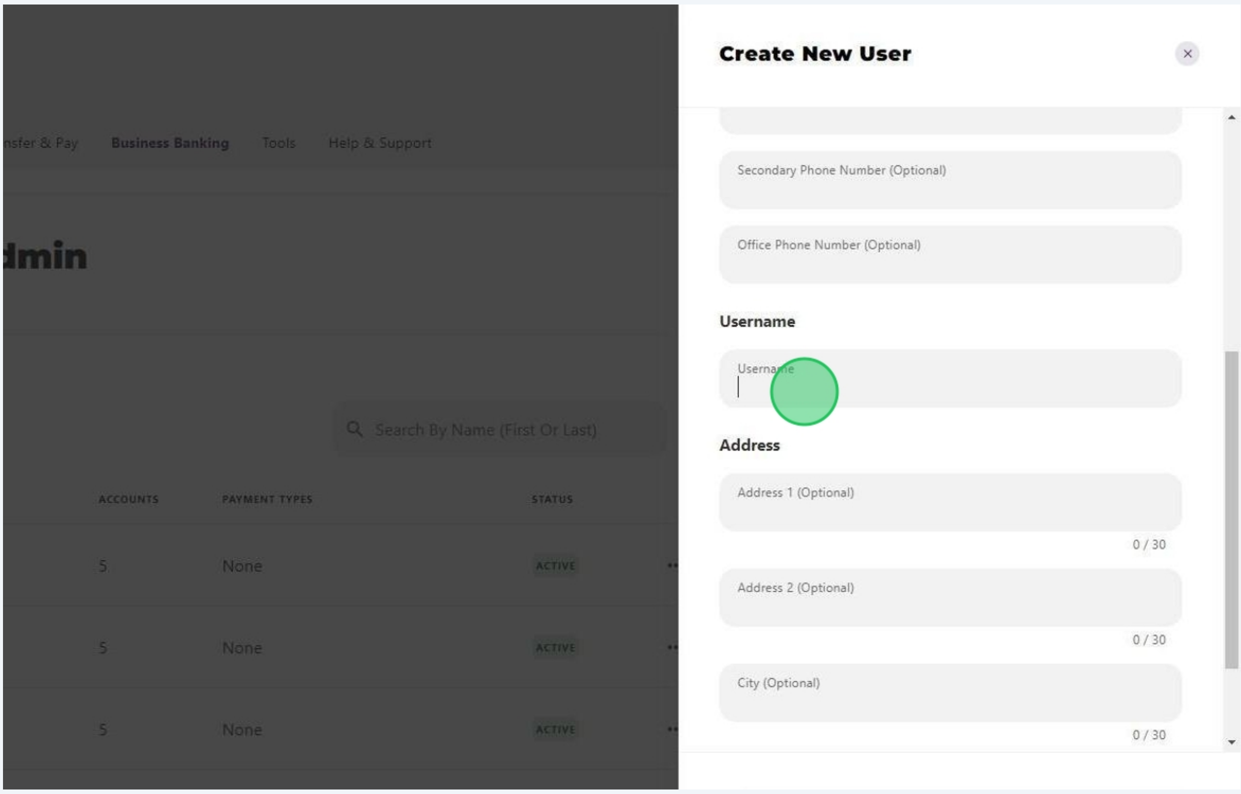
Click on the **+ (plus)** icon



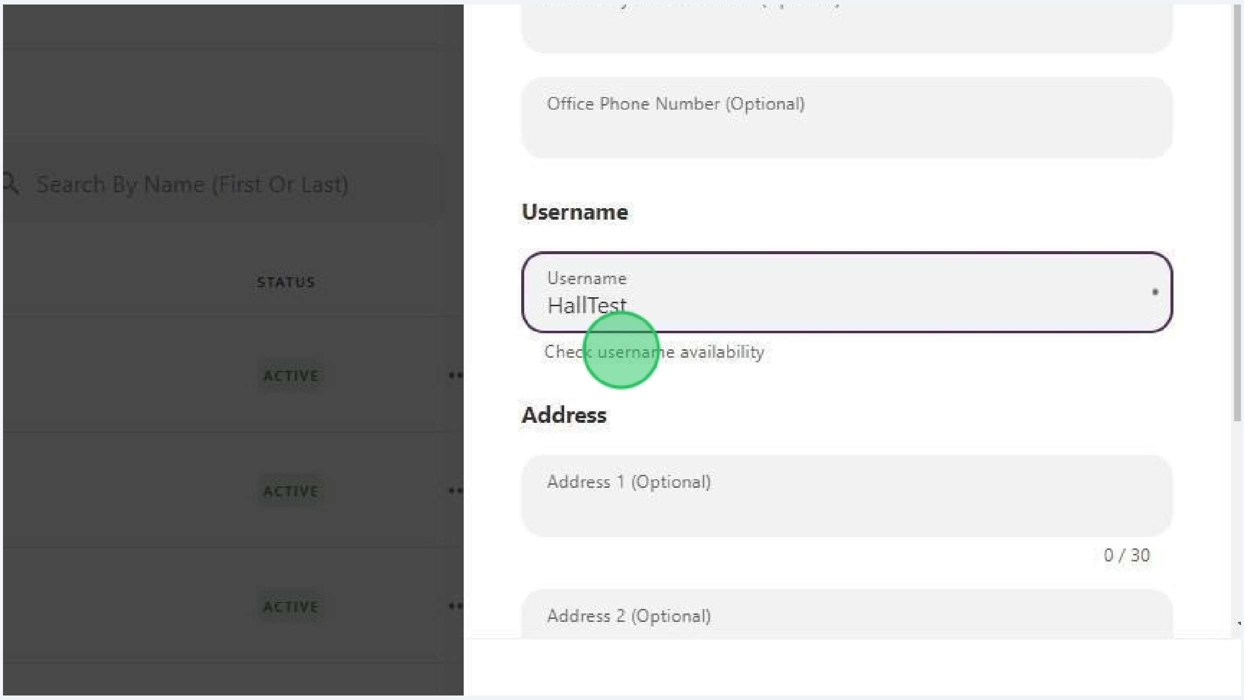
3 Select the "**New User**" box.



4 Fill out the required information, including creating a **username** for the sub user. (**The username should be provided to the sub user by the person who is creating the new sub user profile)**

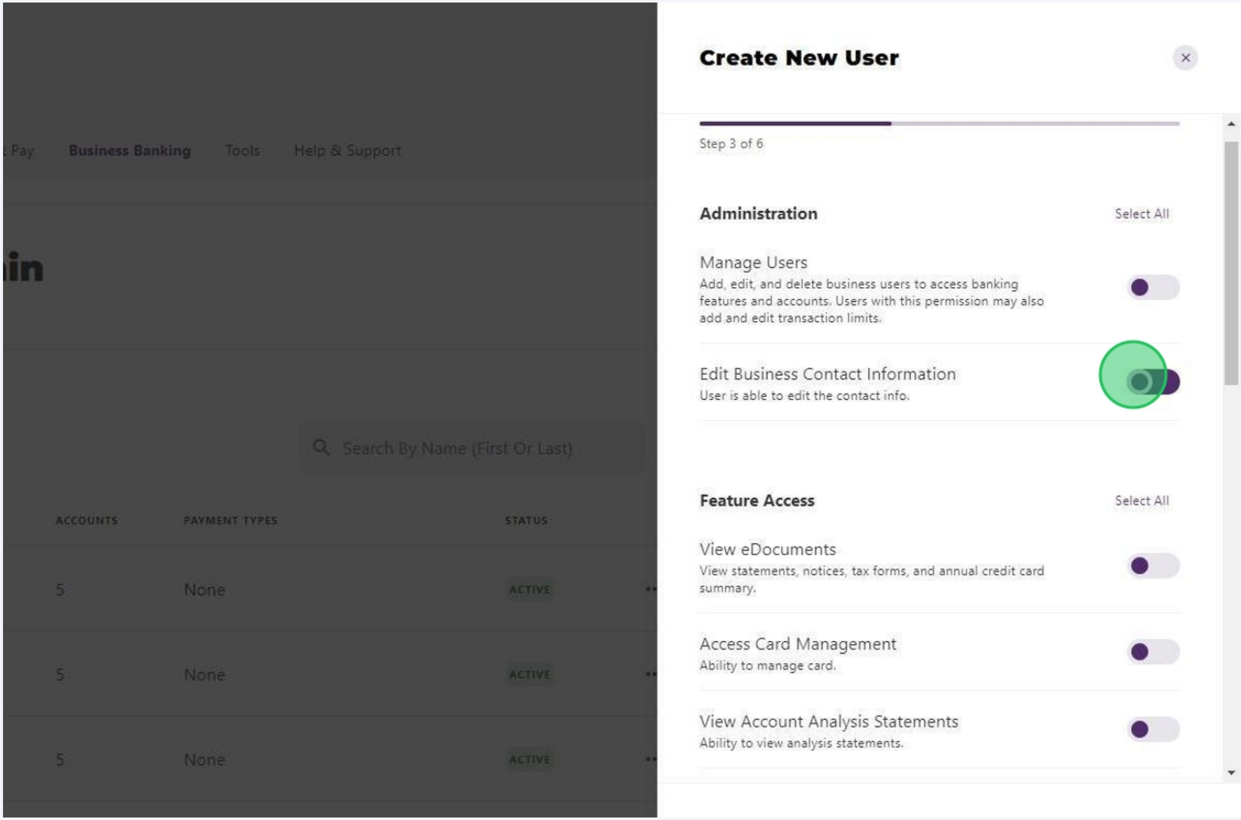


5 Click "Check username availability"



6 Step 3: Set Permissions and Limits

1. On the "Permissions and Limits" page, assign the appropriate access for the sub user.



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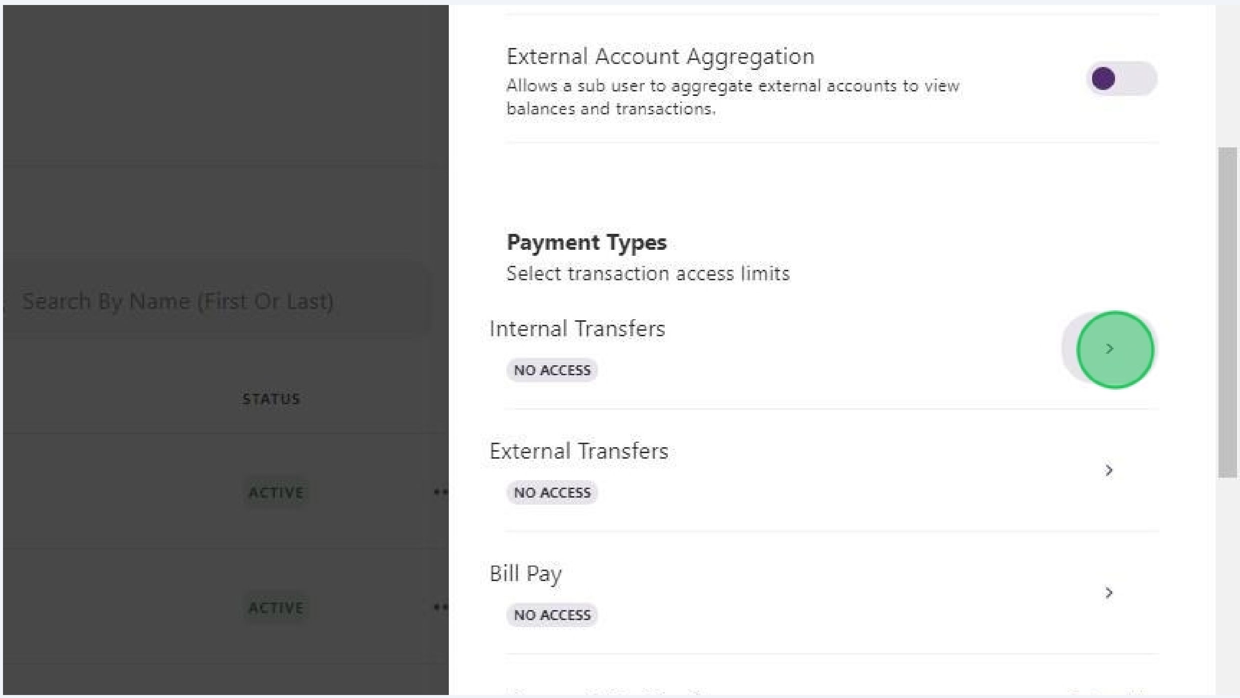
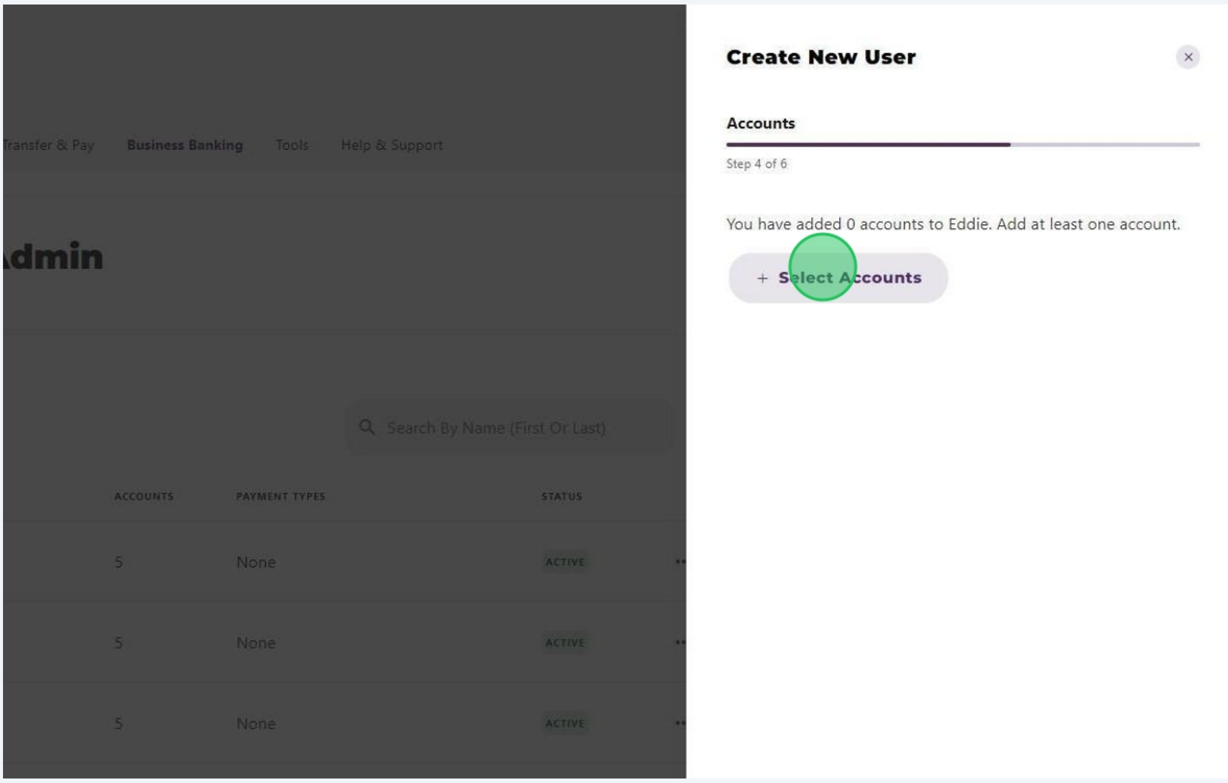
1. You can assign access in the following areas: (open each area to see what access is included)

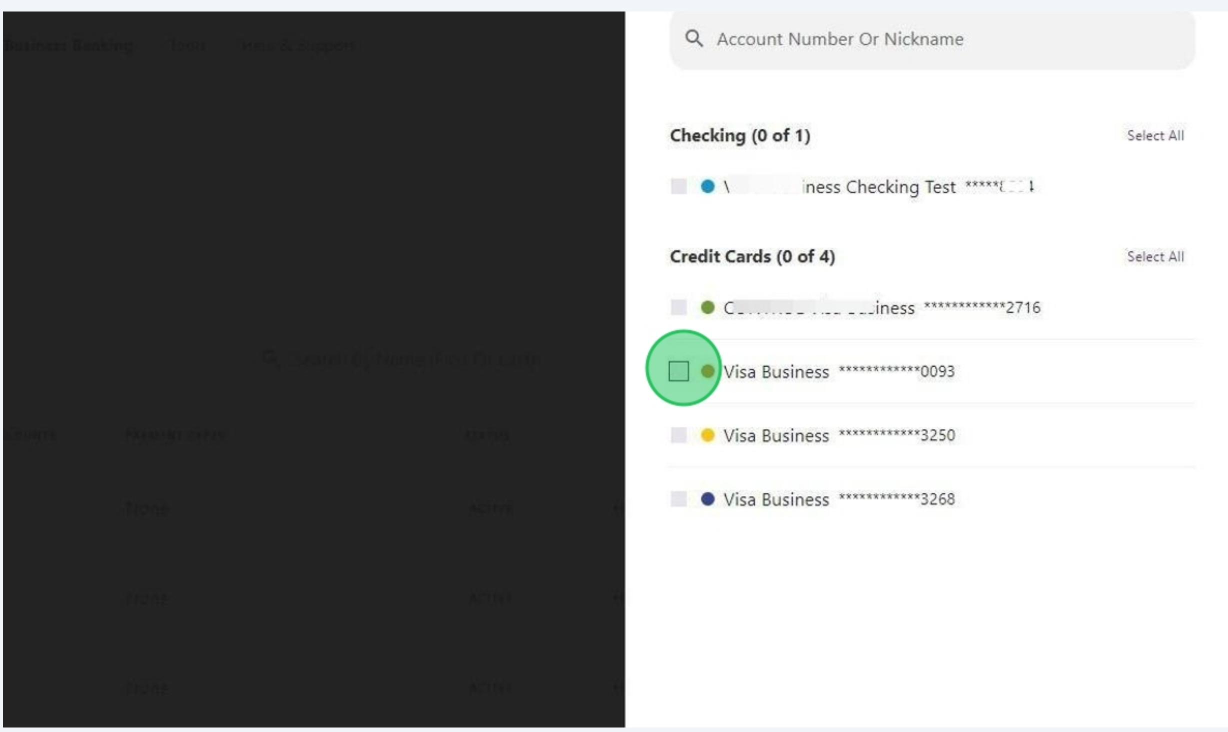
- **Administrative Access**
- **Feature Access**
- **Payment Type Access**
- **Payments Destination and Receivables**
- *(You also have the option to grant full access to the sub user.)*



8 Click "Select Accounts"



9 Select the **accounts** you want to grant access to the sub-user, then set the account permissions.



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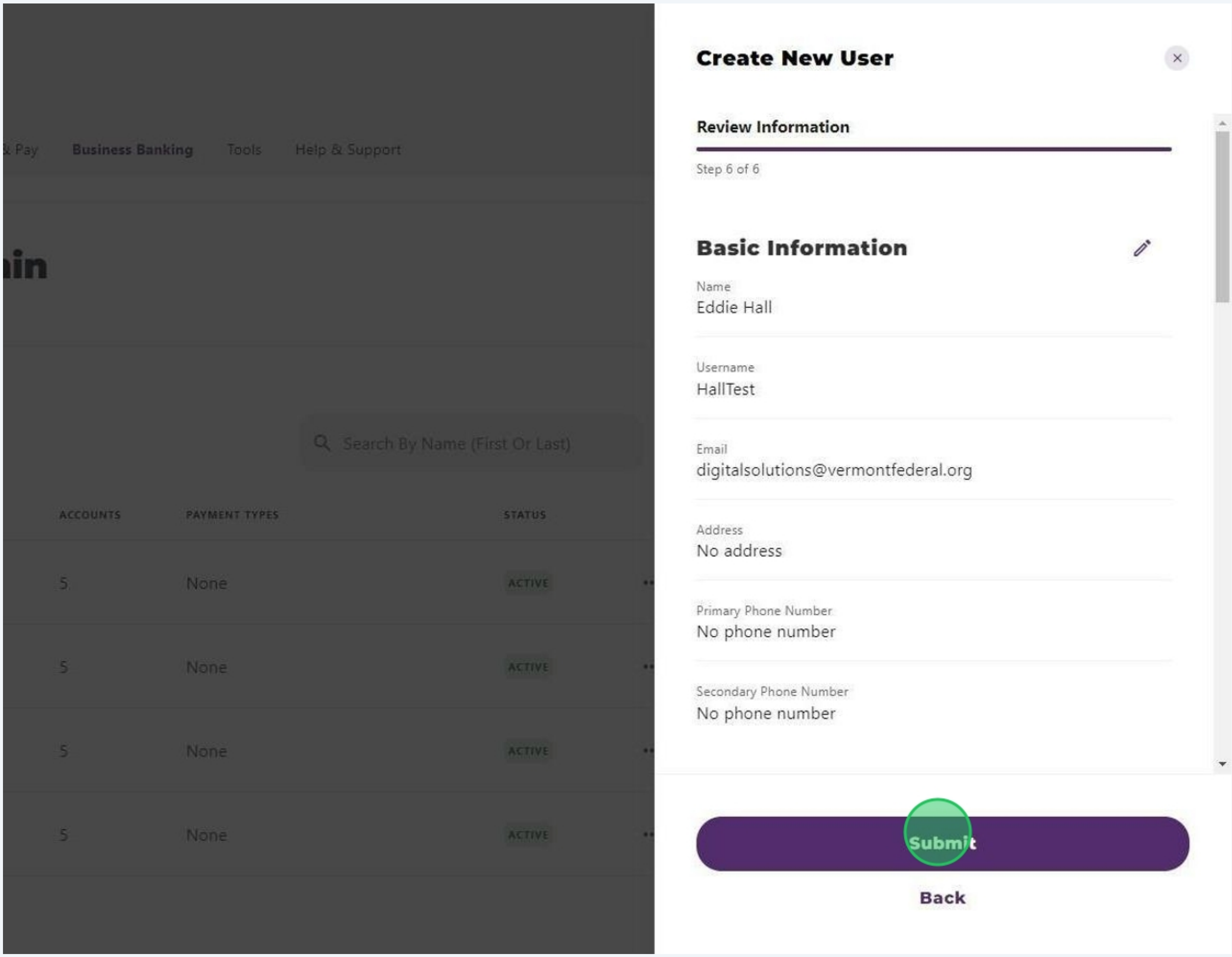
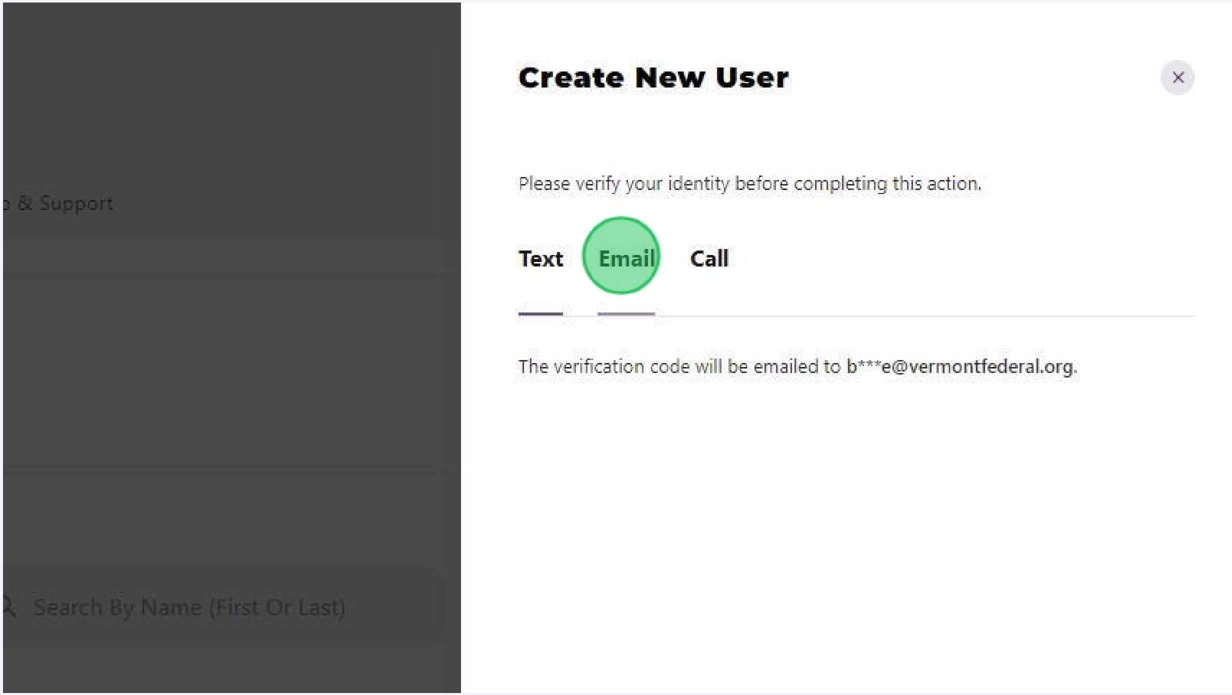
Step 4: Review and Submit

1. After assigning permissions, click "**Next**."
2. Review all the entered information to ensure accuracy and click "**Submit**."

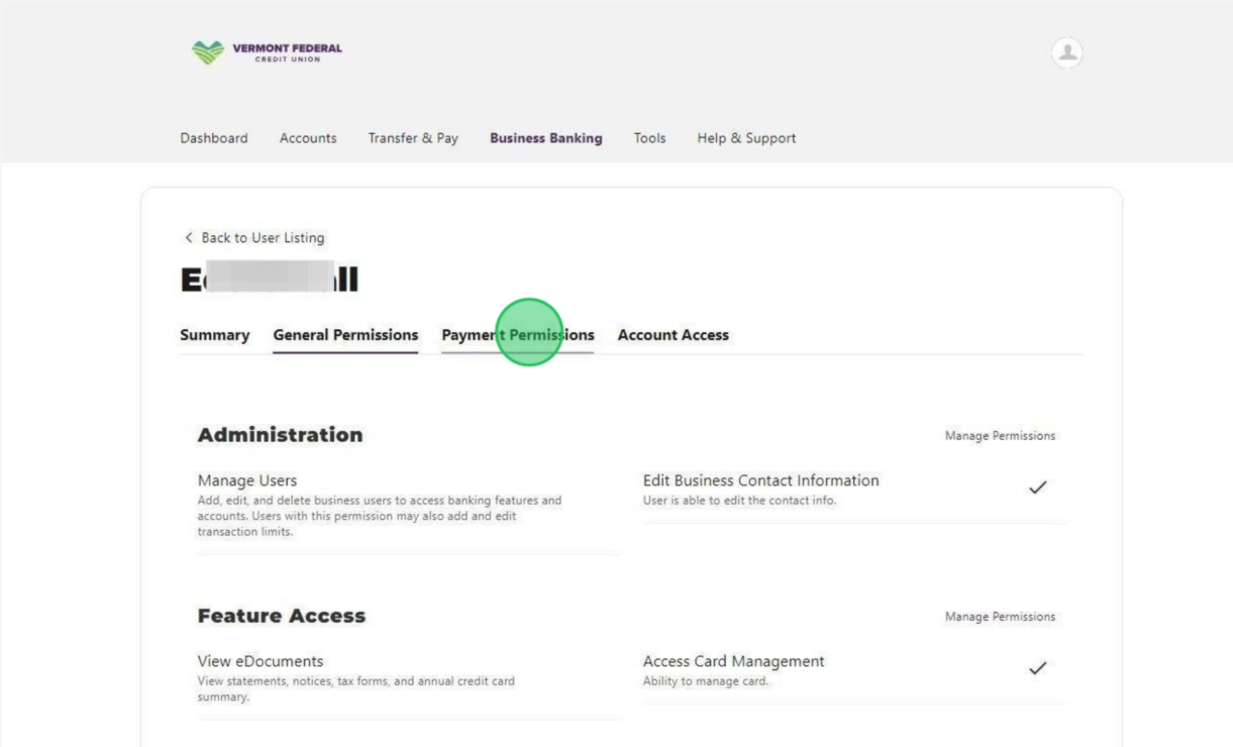


11 Select your preferred verification method (via email or SMS) and **verify** your identity



12 Step 5: Manage Sub User Profiles

1. Once your identity is verified, you can **view the newly added user profiles.**
2. From this page, you can **edit, manage access, or change permissions** as needed.



13 Sub User Login Setup -STEPS

1. The sub user will need to receive the username from the master business user.
2. The sub user will receive a temporary password via email that will expire within 24 hours.

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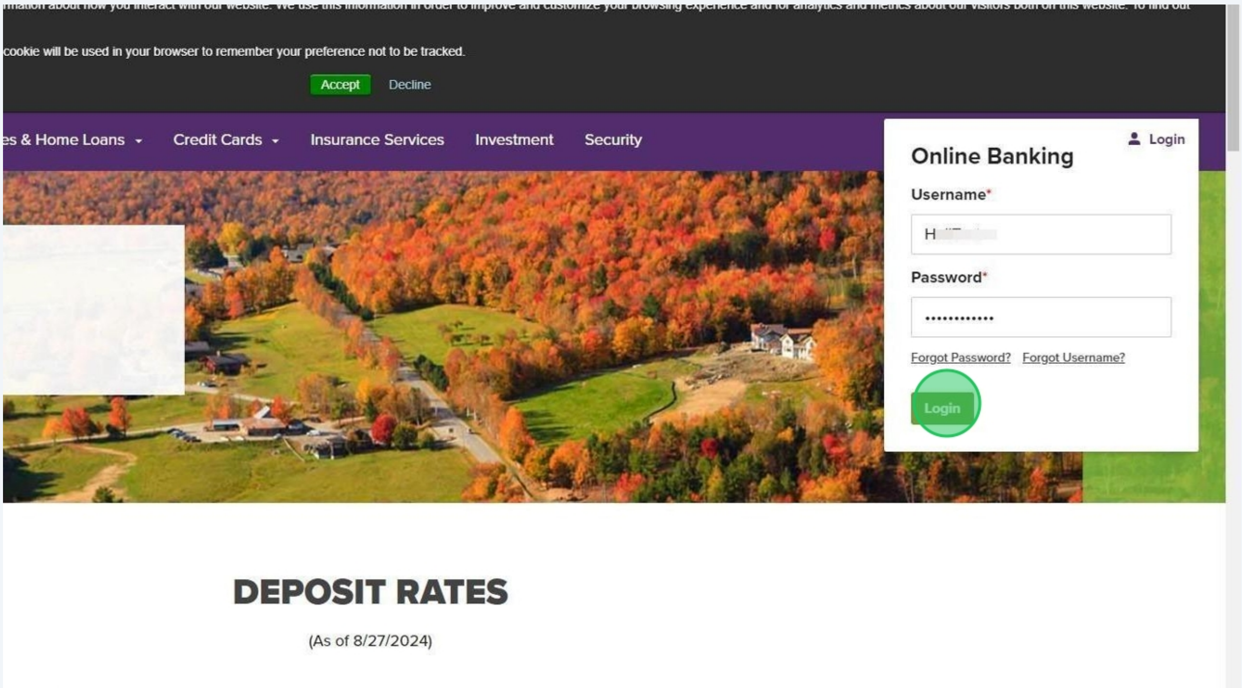
Step 7: Sub User First-Time Login

1. The sub user need to open the Vermont Federal Credit Union website or download the mobile app and select "**Login**."



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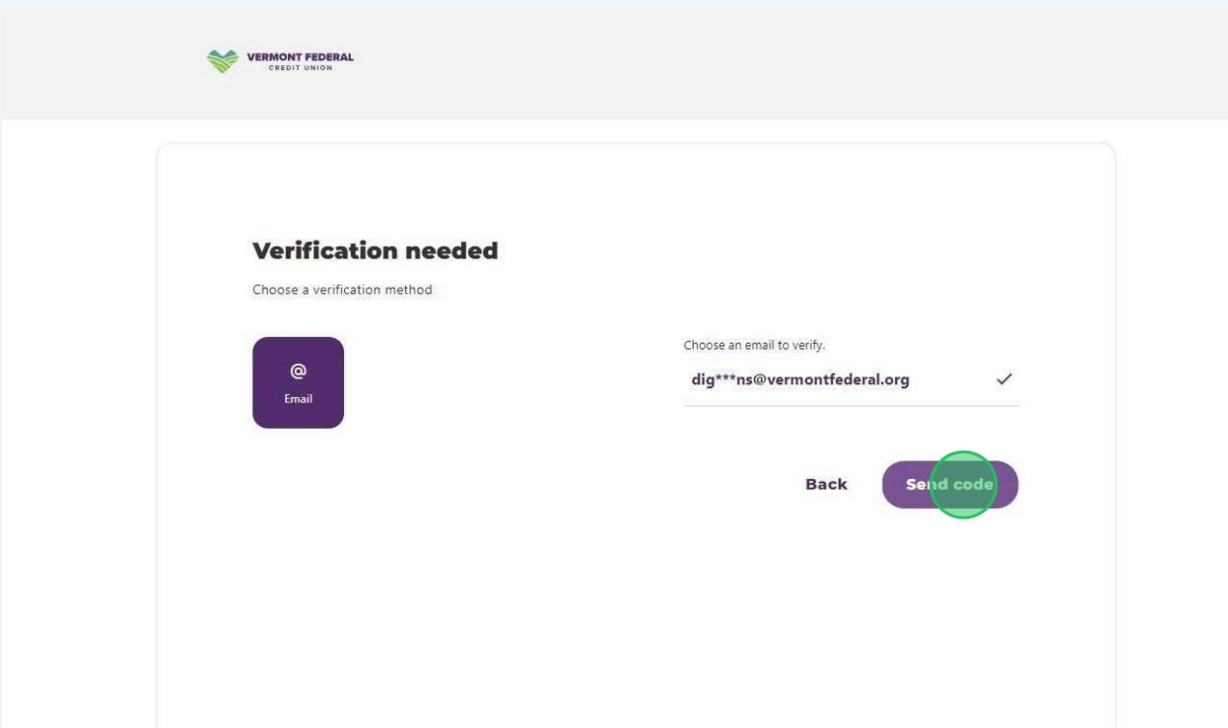
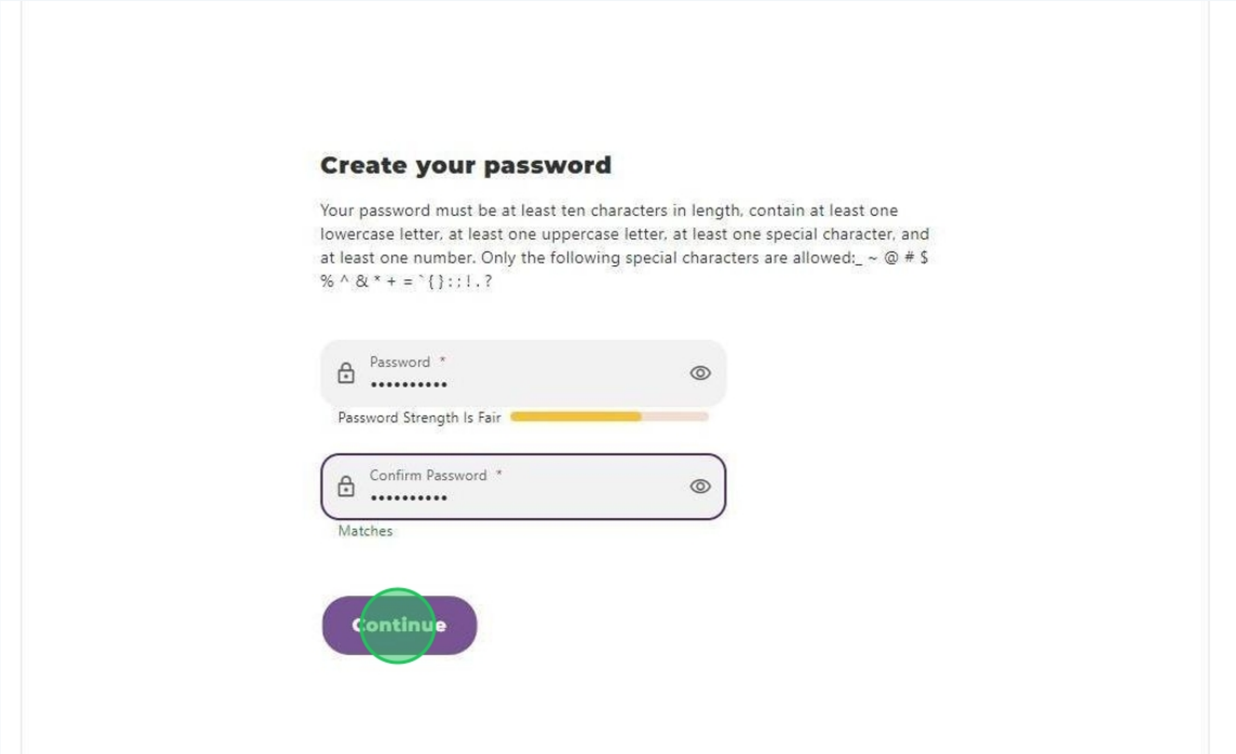
They will **verify** their identity via a code sent to their email



16 They will then create a **new password** and gain access to online banking.



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New added sub user can now access online banking.

Note: If you encounter any issues, please contact member support for assistance (888) 252-0202. Thank you!