# User Maintenance

User maintenance for a company is handled by the master user. Below are steps to manage users for your company.

Create New User

1. While logged into Digital Banking, select Manage Profile in the upper left of the screen.
2. The Profile page will appear with sub-users listed on the far right. To create a new sub-user, select the plus sign in the Sub-User section.
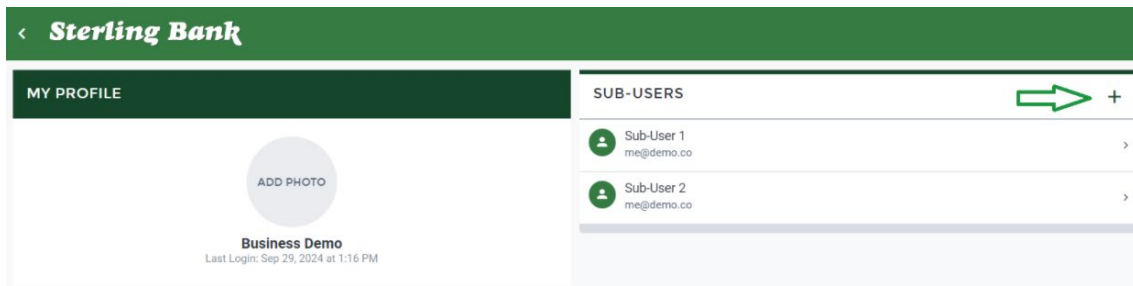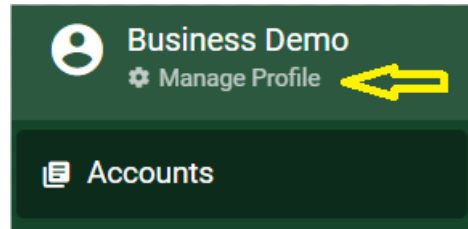

3. If another sub-user exists, you will have the option to copy permissions from another sub-user.

   a. Complete the required information: Full Name, Email Address, Display Name, and Invite Answer.
   b. Select from the available options if appropriate.
   c. Grant access to accounts. All available accounts will display. Select those that the sub-user should have access to. Select **Continue**.
   d. Click **Create Sub-User.**
   e. Upon finishing the process, you will see a Success message letting you know that the sub-user was created.

Edit a Sub-User

1. After the sub-user has been created, you can edit the user from the Manage Profile window.
2. Select the sub-user you wish to edit from the list.

3. Account permissions can be edited by clicking the **Permissions** button or by clicking on the **Edit** button of the desired account.
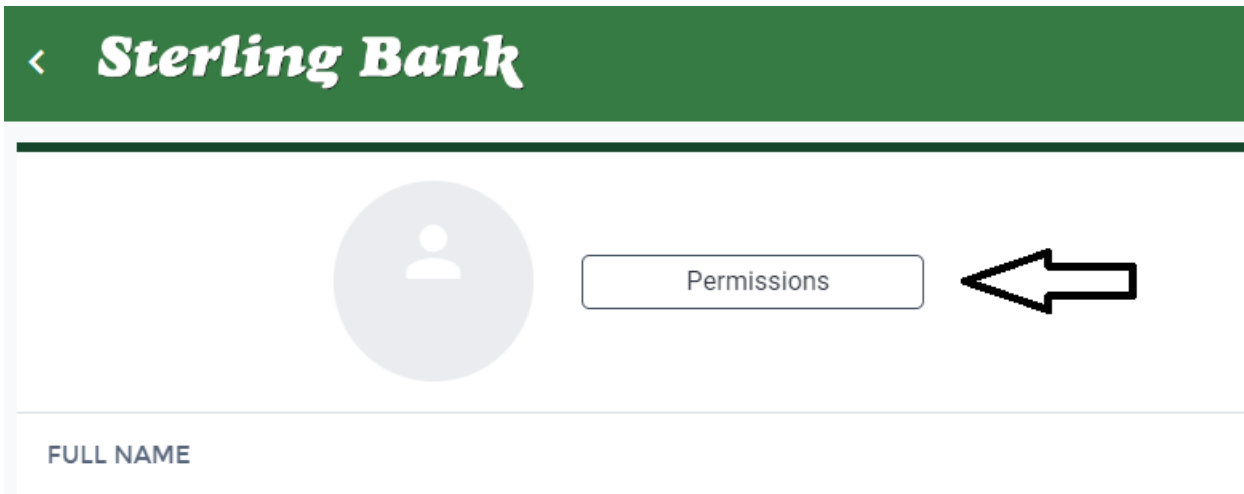
4. Account access can be removed by clicking the **Remove** button for the desired account.
5. Access can be granted to additional accounts by clicking the **Grant Access to Account** button and selecting the desired account(s).
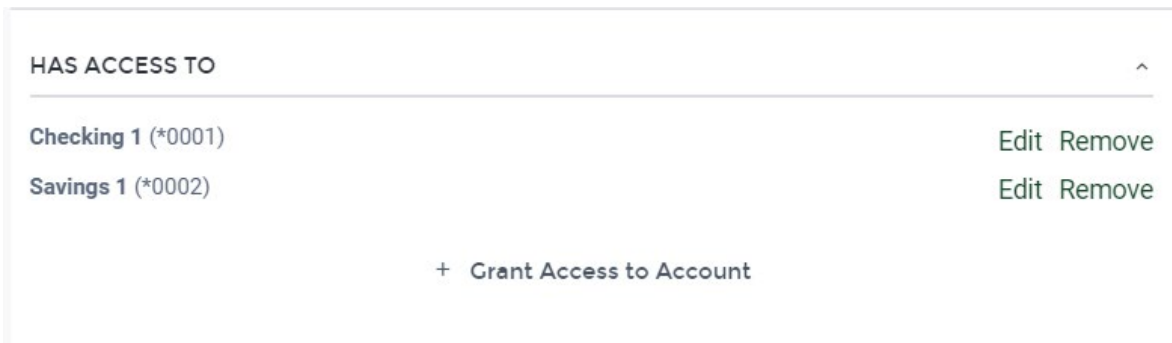
6. Sub-users can be deleted by selecting the **Delete this Sub-User** button.
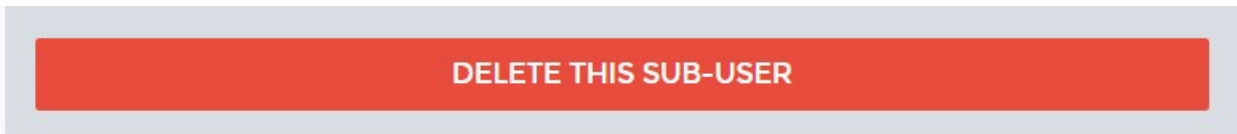
7. Changes are effective immediately upon saving the changes.

Setting Account Limits

1. When editing a Sub-User, select **Permissions** and select an account.

2. Select the **Limits** option and enter the desired amounts. Amounts cannot exceed the max amounts displayed under each limit description.

3. Select **Save All Permissions**.

Unlocking Users

1. From the Sub-Users listing, a locked user will be highlighted in red with **"LOCKED"** in red above their name.
2. Click on the Sub-User's name.
3. Select the red banner at the top that says **Unlock**. A window will appear to confirm the decision.

4. Select **Unlock**.
5. A confirmation message will appear.

10/3/2024