Quick Guide

Online Banking -
New Sub-Users and Assign Account Permissions

Setting up new sub-users and assigning account permissions.

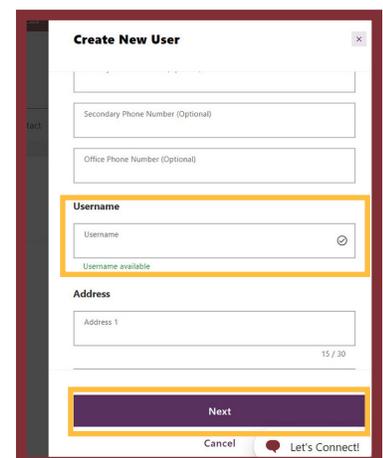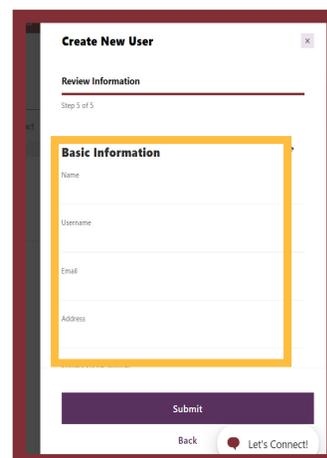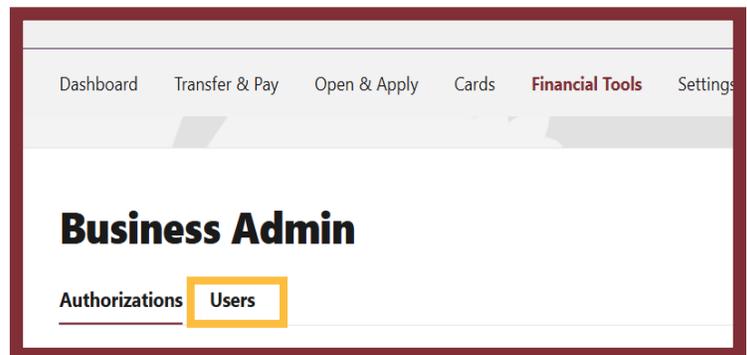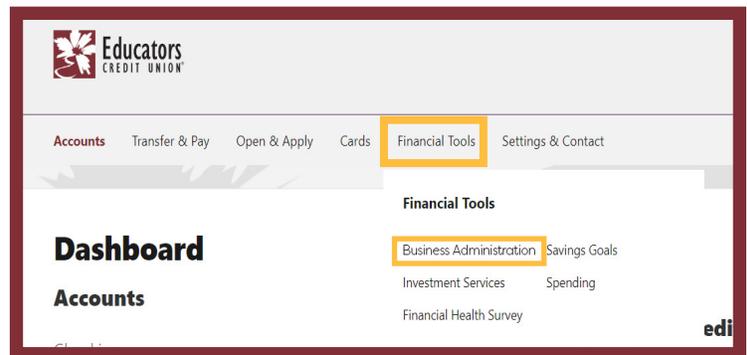1. Log into your business primary account in **Educators Online Banking.**

2. Under **"Financial Tools,"** select **"Business Administration."**
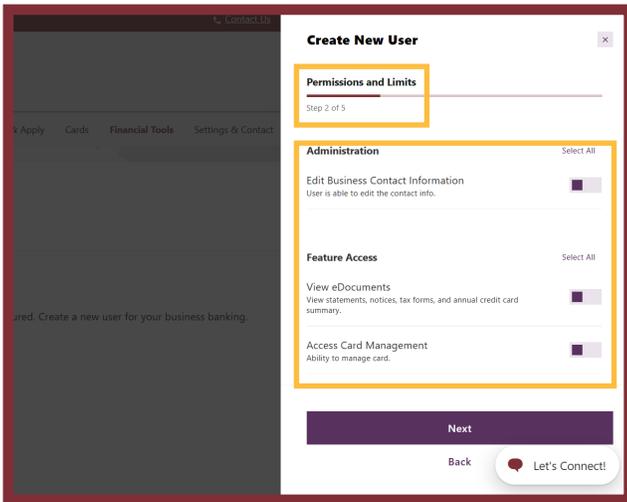
3. Select **"Users"** tab.

4. In the slide out, **enter** in the **sub-user's information.**

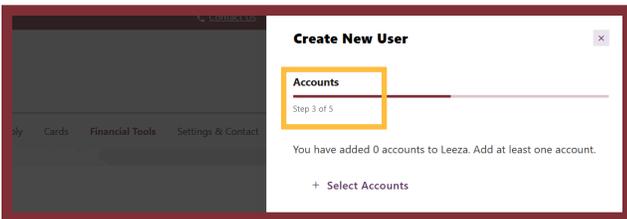5. Create a **username** by filling in the field.

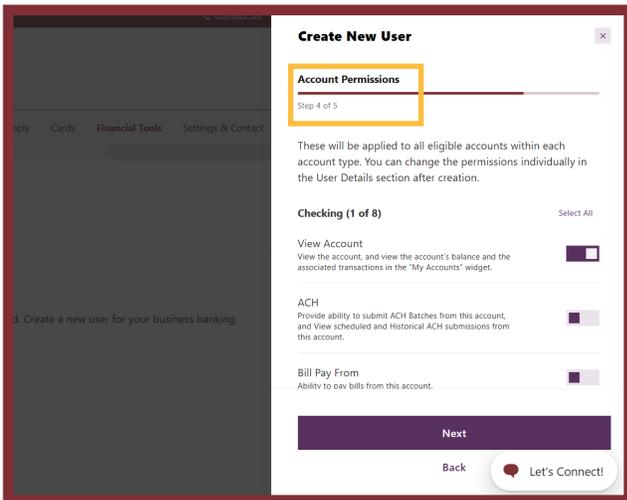6. Once all the fields are filled in, select **"Submit."**
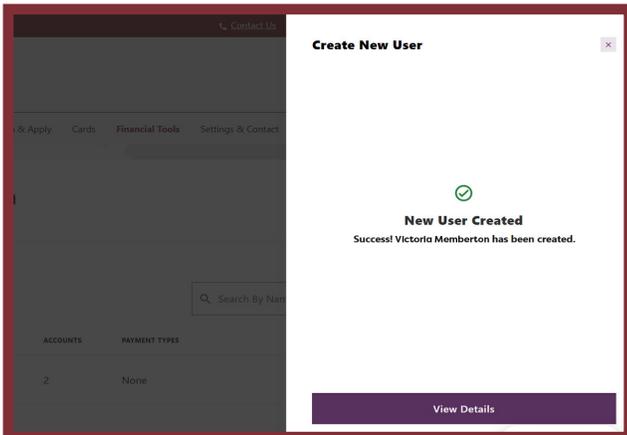
7. In **"Permissions and Limits,"** set the desired access.

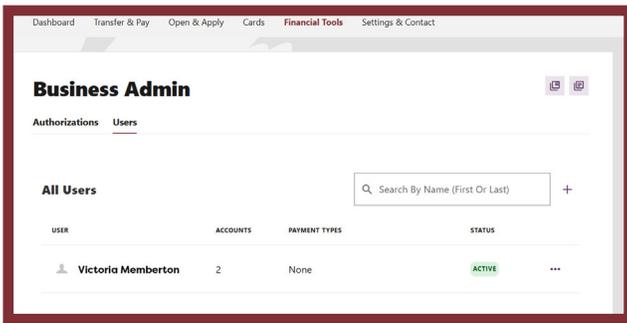**8.** In **"Accounts,"** select which shares the sub-user will have access to.

9. In **"Account Permissions,"** select which features the sub-user will have access to on the **specific share**. Different permissions can be set for each share.
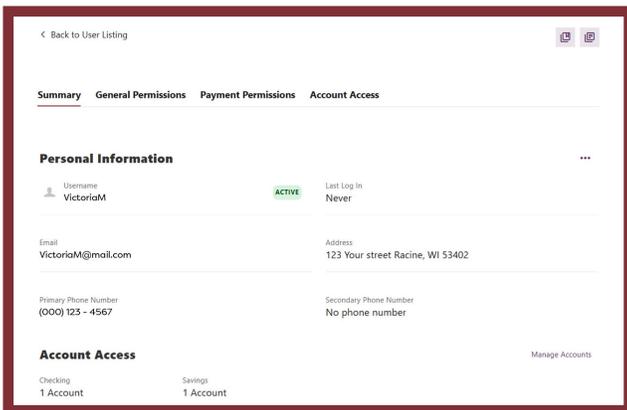
10. The profile is not created unless the **"New User Created"** confirmation appears.

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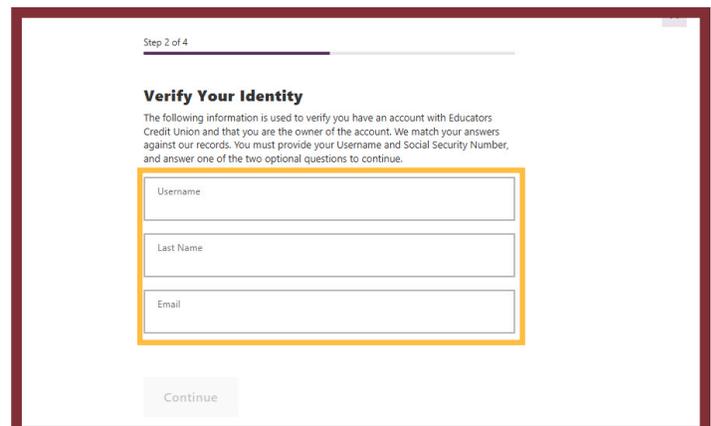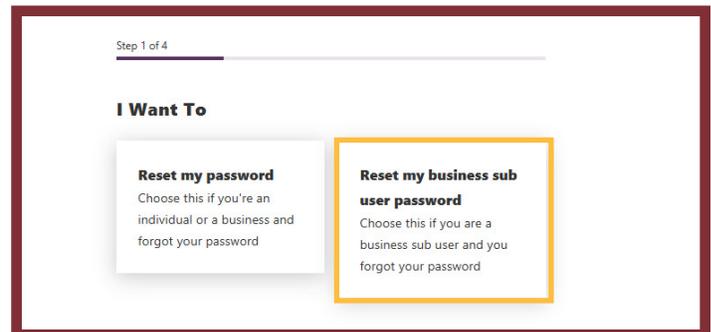New sub-users will show in the Business Admin Screen.

Selecting the username will open the view details and permissions of the sub-user.
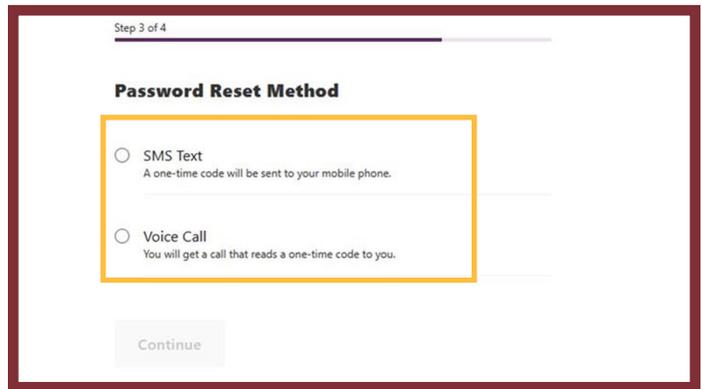
Sub-Users: First Login

1. To login as a sub-user for the first time, choose the **"Forgot Password"** link in the login account section.

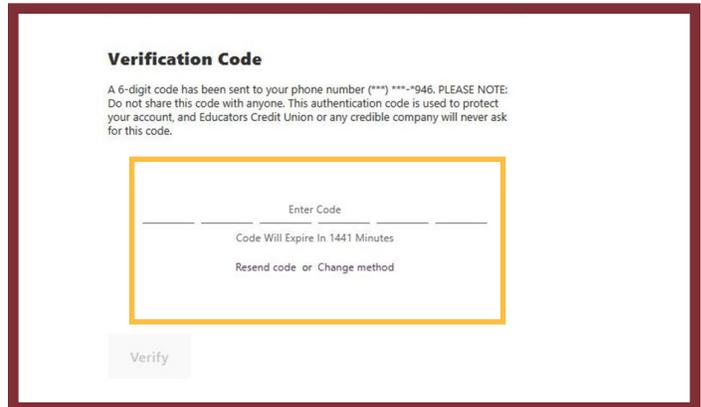Then choose **"Reset my business sub user password."**

2. Next, fill in the fields requested.
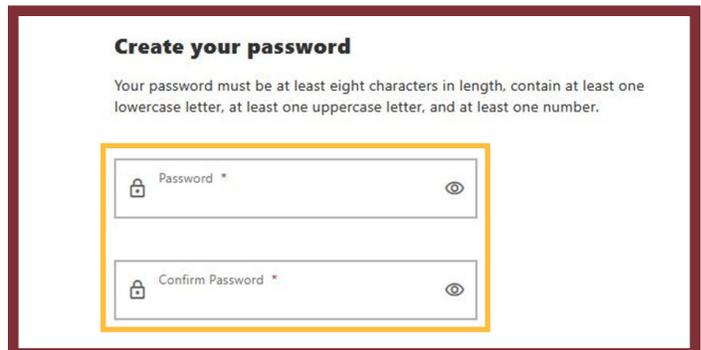
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3. After entering the information on the Verify your Identity Page, you will need to select a method of two-factor authentication.

4. Once you receive your authentication code, enter it into the spaces provided.

5. Once you have entered your verification code, create a password of your choosing that meets the required criteria.

Once your password is created, you will now have access to the Sub-User profile.

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