Sub-User Maintenance

BUSINESS ADMIN

Sub-user maintenance must be completed by business owners. Please do not have sub-users contact the credit union to perform any of these actions. We will not be able to verify the sub-user's identity, leaving us unable to assist. If a sub-user is locked out of the system, you will need to contact Educators Credit Union to request the sub-user be unlocked.

Edit Sub-User Contact Information

1) Click the "Business Admin" widget.

2) Click the "Users" tab.

3) Click the sub-user you want to edit.

4) Click the pencil icon in the "Contact Info" section.

5) Make adjustments to the sub-user's contact information.

6) Click "Save Changes" to complete the process.

Business Admin

Add a Role

Authorizations   Roles   Users

All Roles

CONTACT INFO

EMAIL
bobsmith@xyz.com

PHONE
No phone number specified.

CONTACT INFO

EMAIL *
bobsmith@xyz.com

PHONE

Home Phone

Mobile Phone

Work Phone

ADDRESS

Address Line 1

Address Line 2 (optional)

City   AL   Zip Code

Save Changes   Cancel

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Sub-User Maintenance

1

BUSINESS ADMIN

Update Sub-User Role

1) Click the "Business Admin" widget.

2) Click the "Users" tab.

3) Click the sub-user you want to edit.

4) Click the pencil icon in the "Role" section.

5) Click the role you would like to assign.

6) Click "Submit" to complete the process.

Business Admin

2

⊕ Add a Role

Authorizations | **Roles** | **Users**

All Roles

ROLE   Office Manager   ✏️ **4**

S0008 BUSINESS C
0008

ROLE

5 ◉ **Office Manager**

Can make transfers and view accounts.

View details

○ **Accountant**

Can view statements and account history.

View details

○ **Payroll Manager**

Can schedule payroll biweekly.

View details

6 **Submit**   **Cancel**

Sub-User Maintenance

1

BUSINESS ADMIN

Reset Sub-User Password

1) Click the "Business Admin" widget.

2) Click the "Users" tab.

3) Click the sub-user you want to edit.

4) Click the pencil icon in the "Reset Password" section.

5) Select "Email" or "SMS" (text).

6) Enter a reason for the password reset.

7) Click "Submit" to complete the process.

Note: Temporary passwords expire in 24 hours. If the sub-user's email or cell phone number has changed, update contact information before resetting the password.

Business Admin

2

Add a Role

Authorizations | **Roles** | Users

All Roles

RESET PASSWORD

4

RESET PASSWORD

Select a method to receive a new password.

5

EMAIL

⦿ Bobsmith@Xyz.Com

◯ OTHER

SMS

◯ OTHER

6 Please enter the reason for resetting the password. *

7 Submit | Cancel

Educators
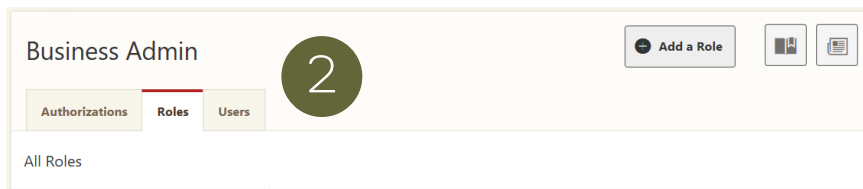CREDIT UNION™

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Sub-User Maintenance

BUSINESS ADMIN

Reset Sub-User Security Questions

1) Click the "Business Admin" widget.

2) Click the "Users" tab.

3) Click the sub-user you want to edit.

4) Click the pencil icon in the "Reset Security Question" section.

5) Enter a reason for the security question reset.

6) Click "Submit" to complete the process.

Note: The next time your Sub-User logs in, they will be required to set up new security questions and answers.

Business Admin

Add a Role

Authorizations | Roles | Users

All Roles

RESET SECURITY QUESTIONS

RESET SECURITY QUESTIONS

Please enter the reason for resetting the user's security questions. *

Submit   Cancel

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Sub-User Maintenance

BUSINESS ADMIN

Delete Sub-User

1) Click the "Business Admin" widget.

2) Click the "Users" tab.

3) Click the sub-user you want to delete.

4) Click "Delete User" at the bottom of the page.

5) Click "Yes, Delete User" on the pop up to permanently delete this user.

| Authorizations | Roles | **Users** |

All Users

Bob Smith
Office Manager

Sally Johnson
Accountant

⊕ Add a User

Bob Smith
Office Manager

USERNAME	bobsmith1
NAME	Bob Smith ✏
CONTACT INFO	EMAIL
	bobsmith@xyz.com ✏
	PHONE
	No phone number specified.
	ADDRESS
	No address specified.
ROLE	Office Manager ✏
	S0008 BUSINESS C
	0008
RESET PASSWORD	✏
RESET SECURITY QUESTIONS	✏

🗑 **Delete User**

Are you sure?   ✕

Clicking 'Yes' will permanently delete this user from the system. Do you wish to continue?

| Cancel | **Yes, delete user** |

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