



LATINO

BUSINESS
NEGOCIO

LATINOCONNECT BUSINESS

Create New Roles and
Sub-users





New Roles and Sub-user profile creation

LatinoConnect allows the assigned Account Administrator to create permissions and sub-users and grant customized online access.





Follow these 5 easy steps to create sub-users:

1. Log in to **LatinoConnect**.
2. Click on "**Manage Users**".
3. Create **Role(s)**.
4. Create user(s) and **assign a role**.
5. **Notify** the user about their access.

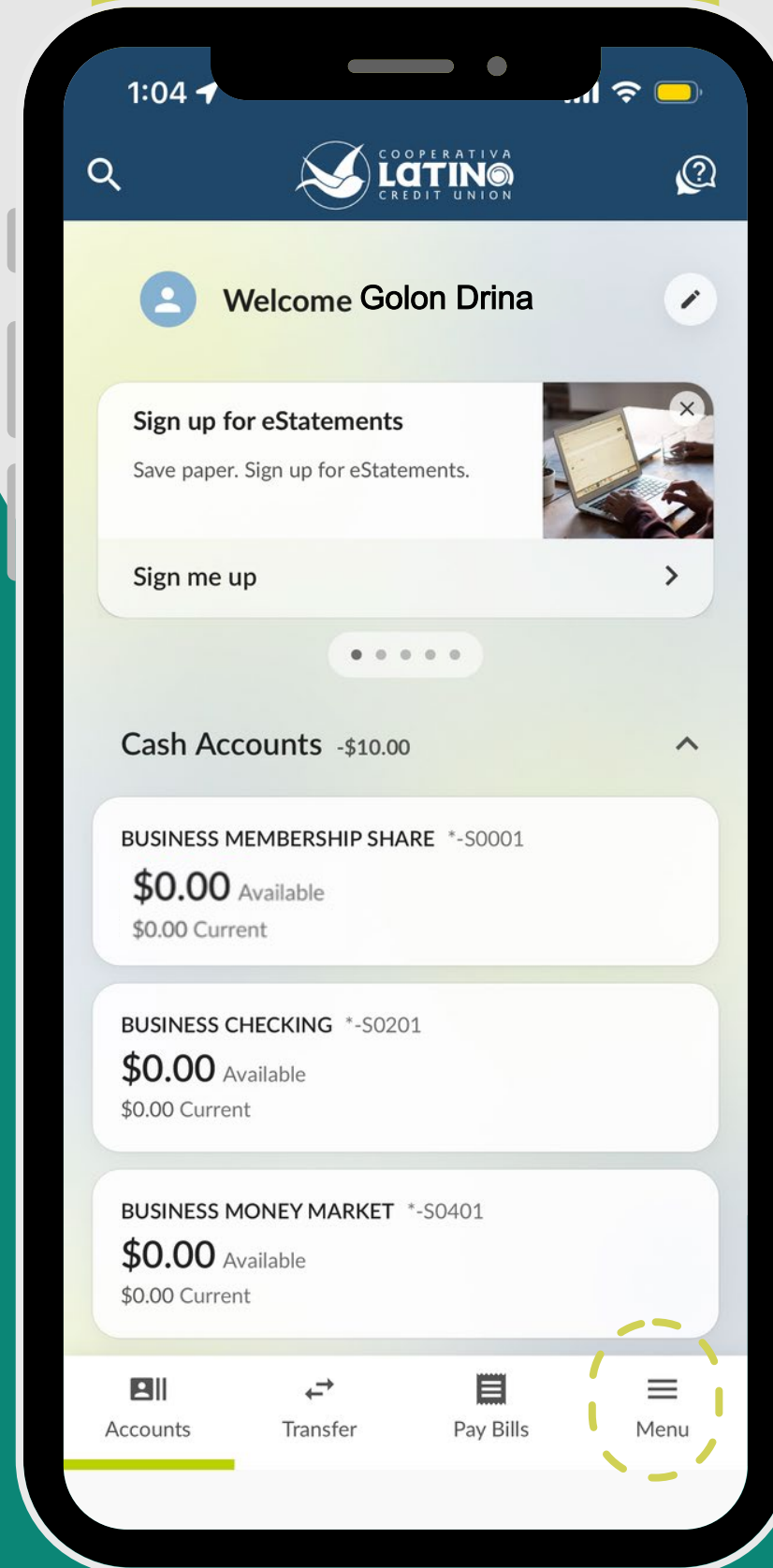
Note: A role defines the position and level of access that the Account Administrator assigns to a person to use LatinoConnect.



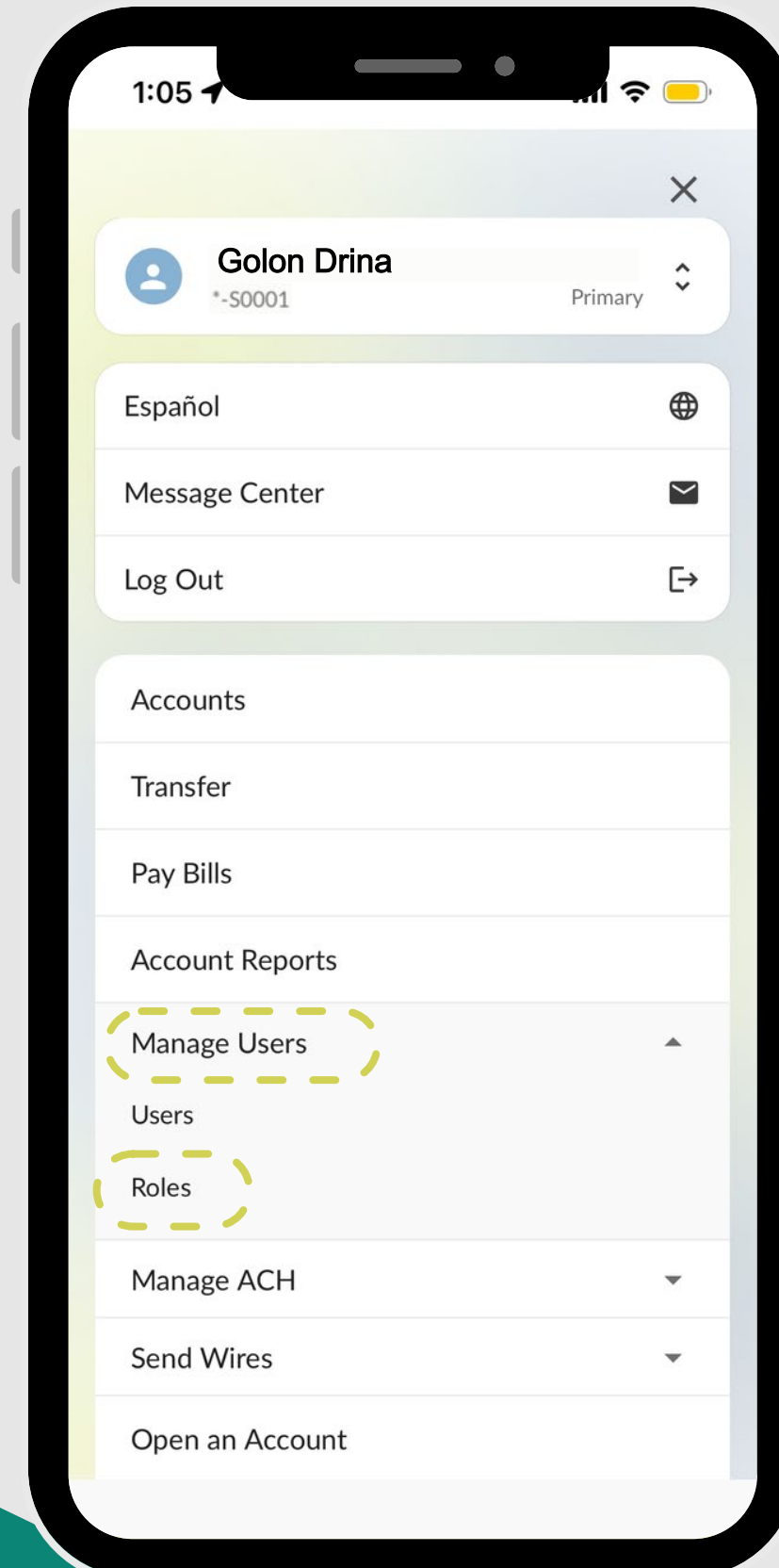
Learn how to add a New Role

Remember, before creating a New User, you must first add a New Role.

Click on "Menu"

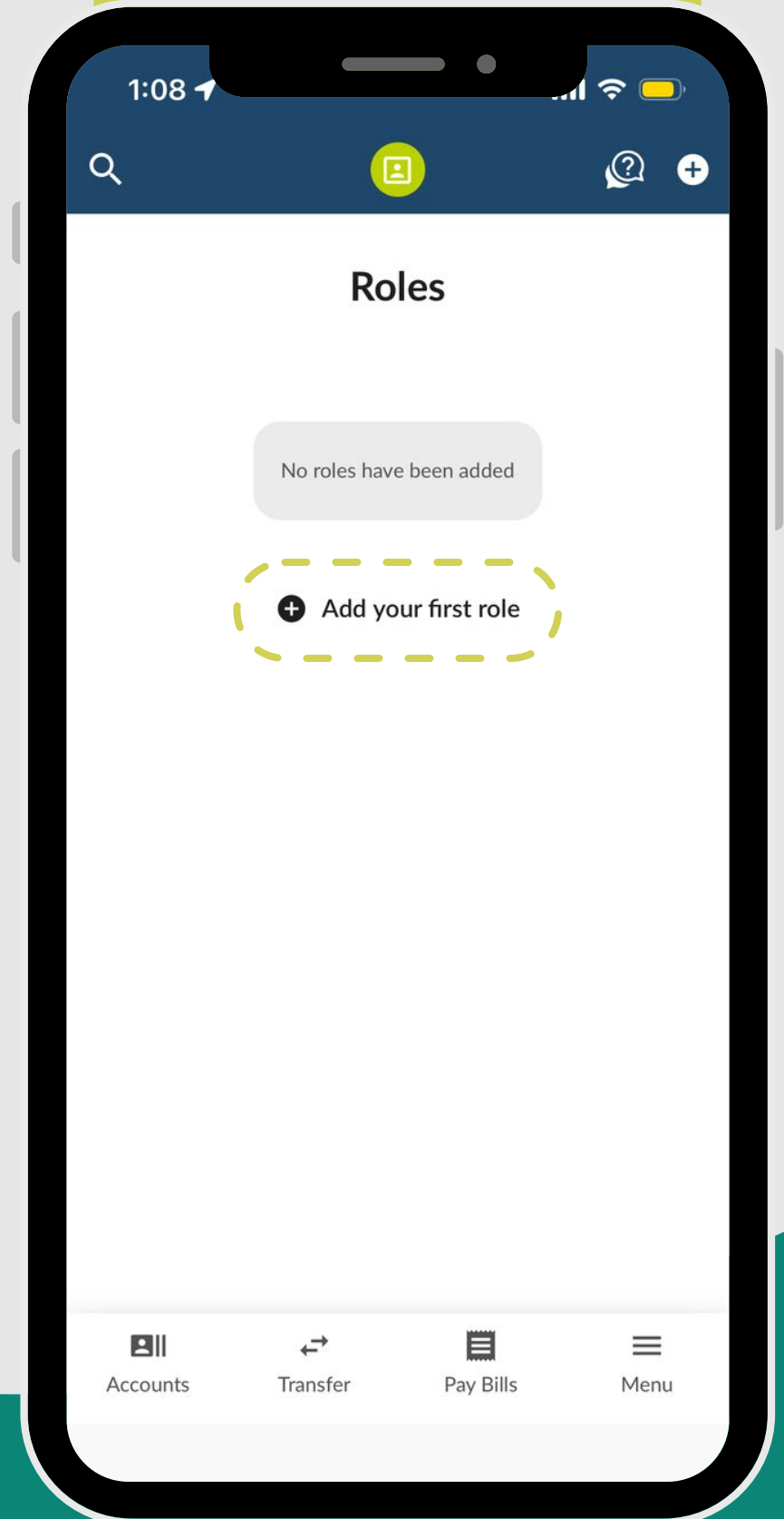


1:05



Click on "Manage Users," then click on "Roles"

Click on "Add your first role"





Verify your identity
and select your
verification method

1:02

COOPERATIVA LATINO CREDIT UNION

New Role

Verify Your Identity

To protect your account, we need to verify your identity. Please choose a verification method to proceed.

Verification Method

Text Message >

Phone Number

(***) ***-**04 >

Next

Cancel

Need more assistance? Click to call 919-595-1800

1:02

COOPERATIVA LATINO CREDIT UNION

New Role

Verify Your Identity

To protect your account, we need to verify your identity. Please choose a verification method to proceed.

Verification Method

Text Message >

Phone Number

(***) ***-**04 >

Next

Cancel

Need more assistance? Click to call 919-595-1800

Enter your verification
code, then click
"Next"

Manage the roles for
your new user, then
click "Create Role"

1:09

COOPERATIVA LATINO CREDIT UNION

New Role

Manage Roles

This User has Access to...

- View Roles
- Create Roles
- Edit Roles
- Assign Roles
- View Role Account Permissions
- Edit Role Account Permissions
- View Role External Account Permissions
- Edit Role External Account Permissions

Create Role

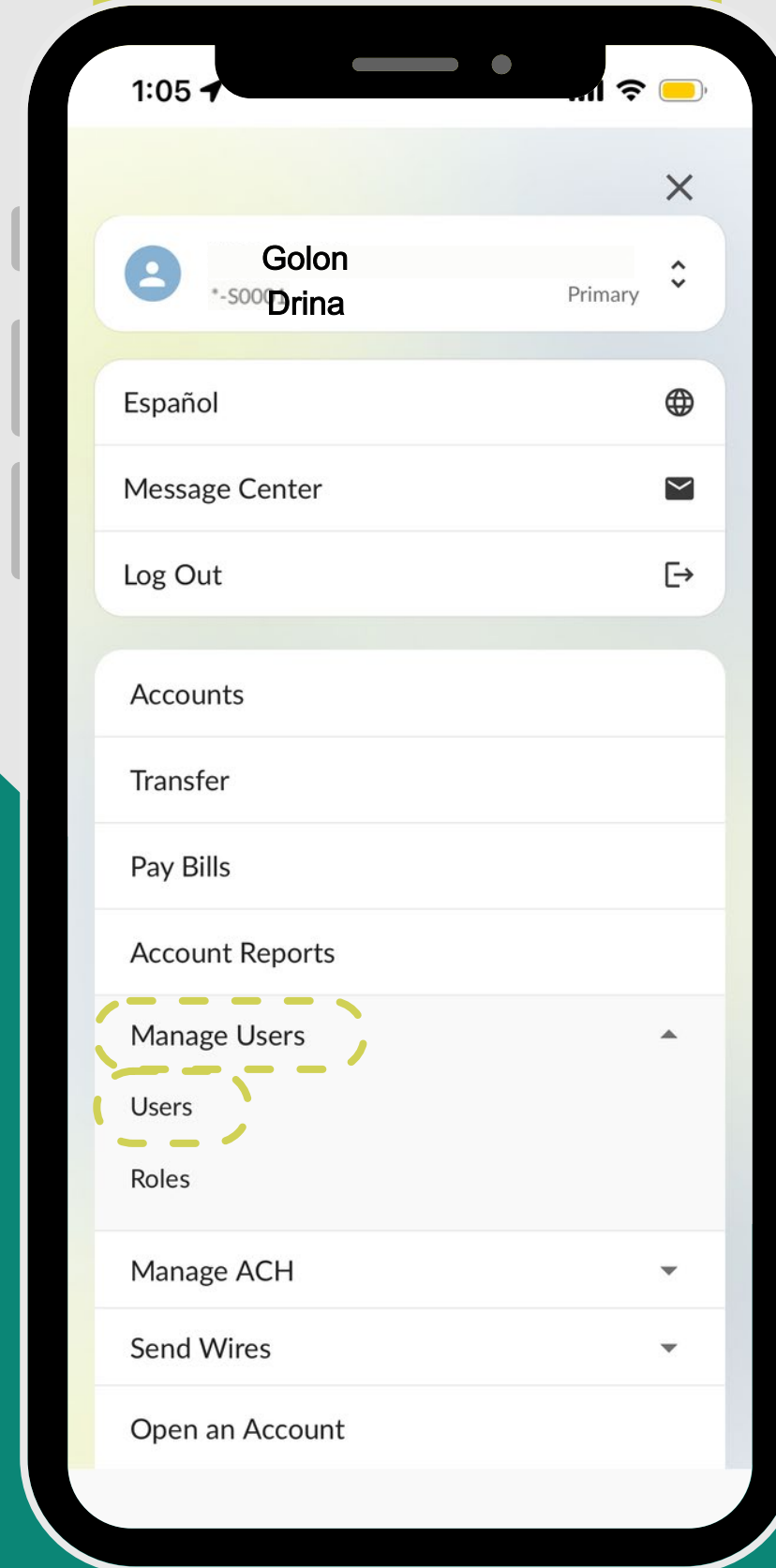
Cancel



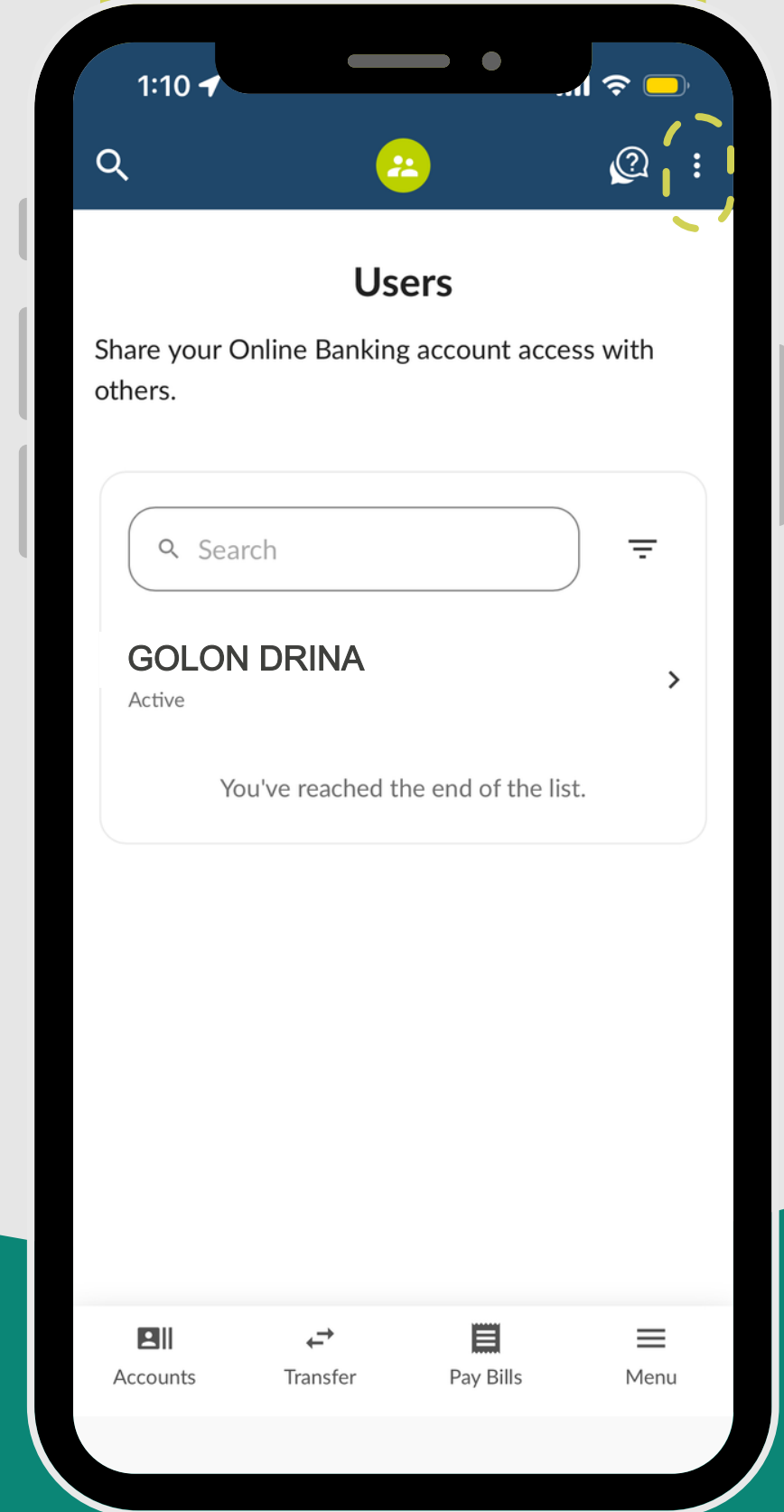
Learn how to add a Sub-user

You can create and manage users from the same tabs where roles are managed.

Click on **“Manage Users,”** then click on **“Users”**

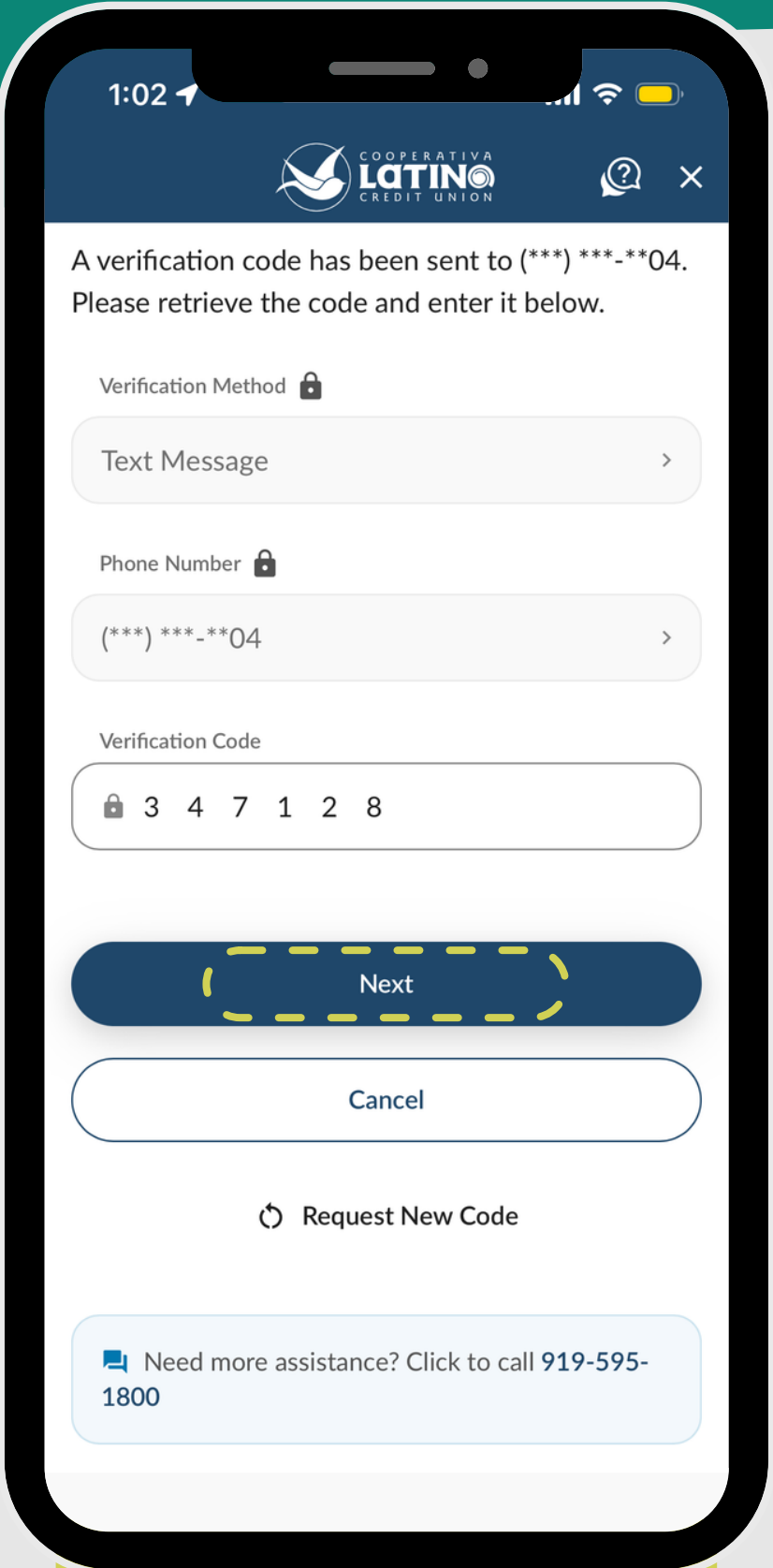
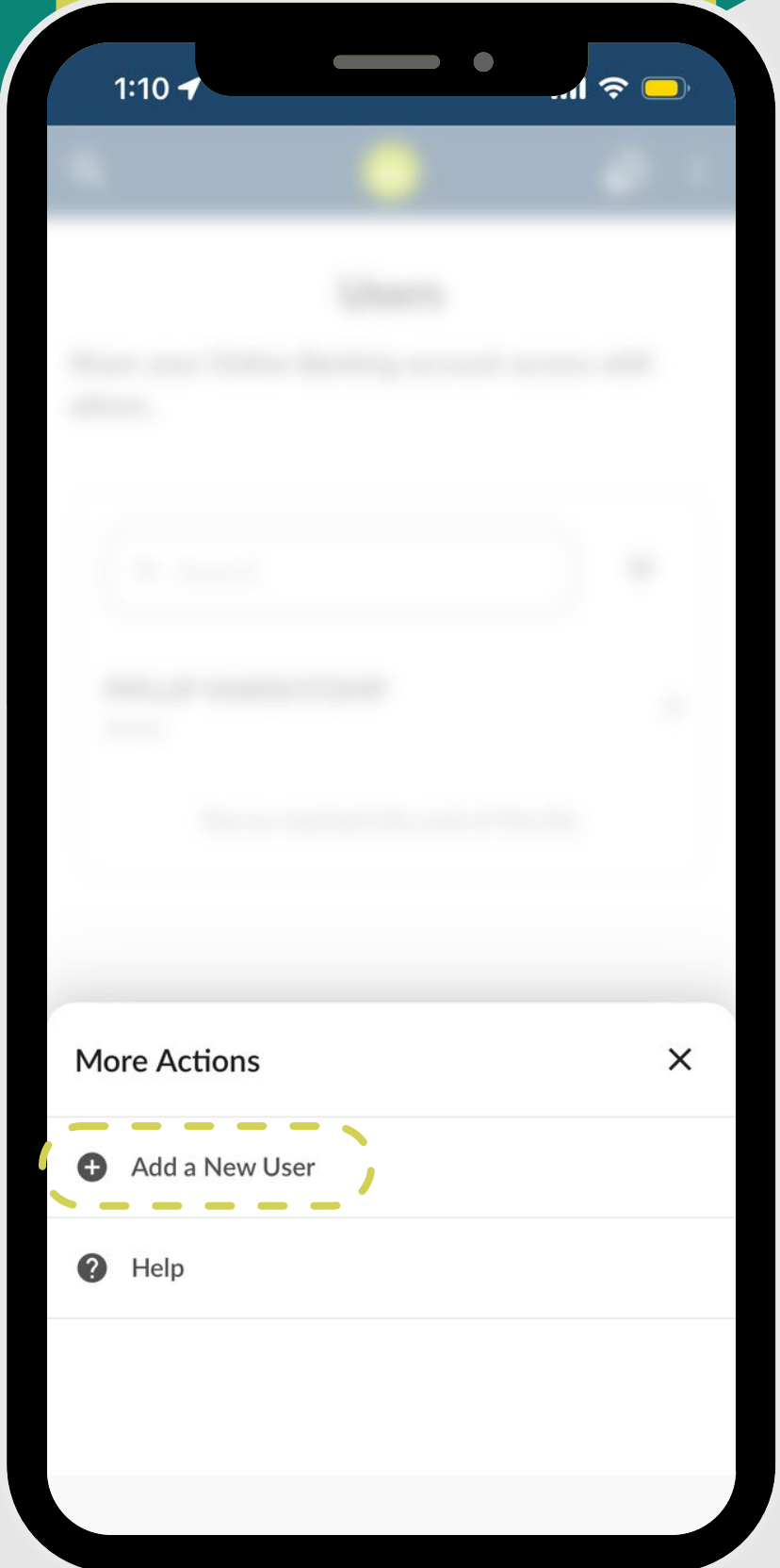


Click on the **three dots** in the **top right corner**



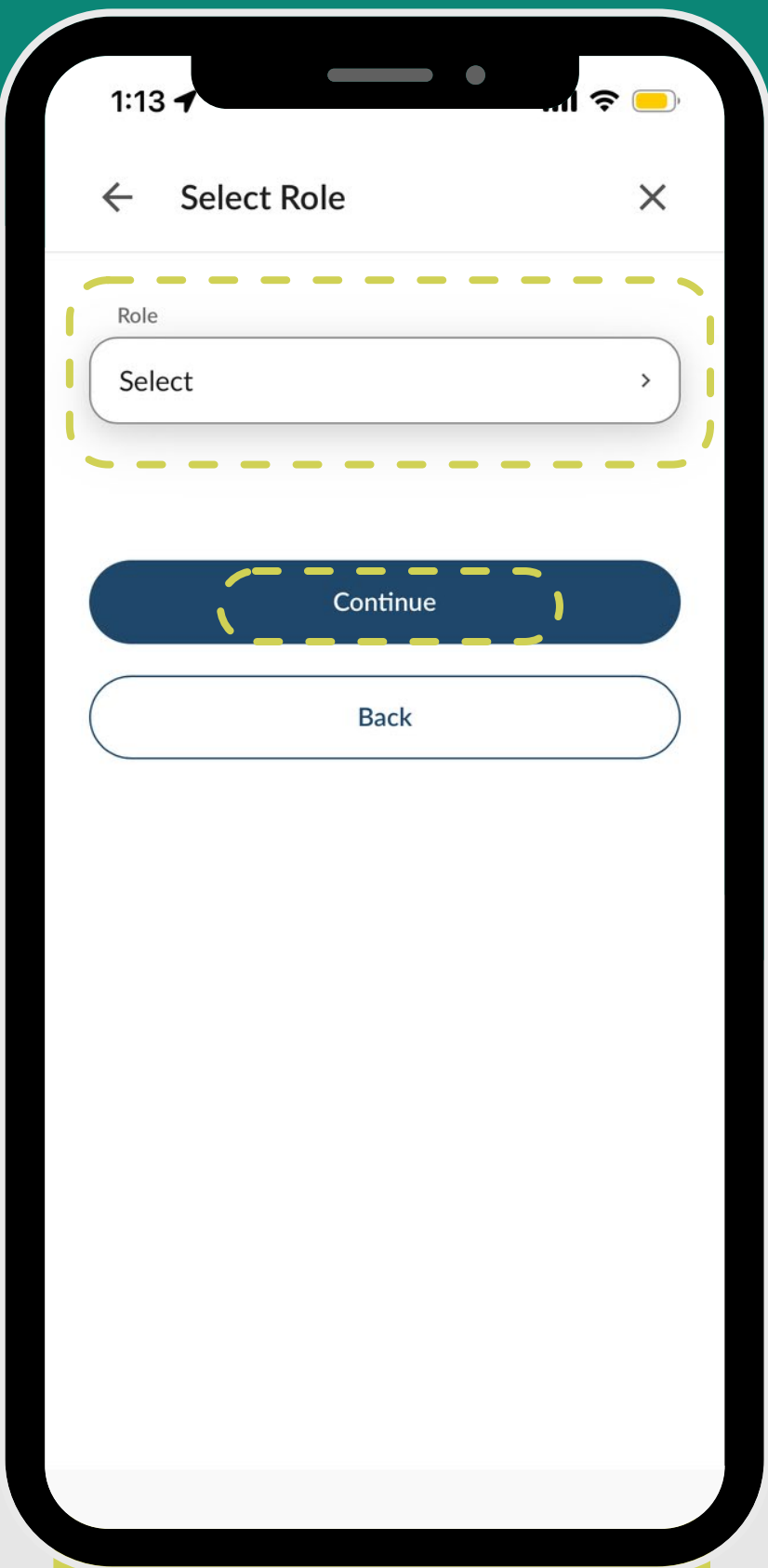
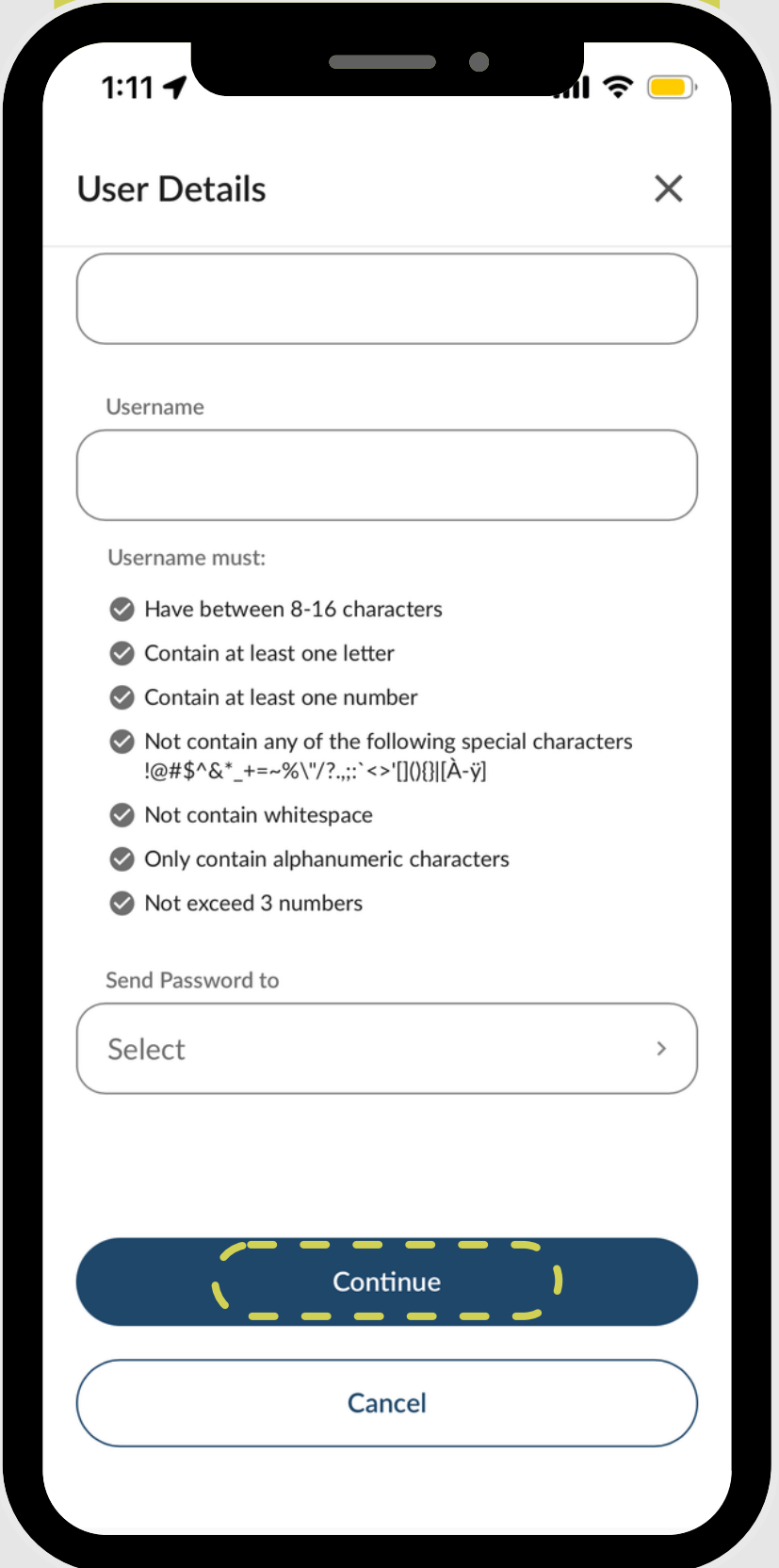


Click on
"Add a New User"



Verify your identity
and enter your
"Verification Code"

Enter the User
Details, then click
"Continue"



Select the Role for the
New User, then click
"Continue"



Set up the New User's access controls, then click **"Continue"**

1:13

← Access Controls ×

Friday
Hours (EDT)
Unrestricted >

Saturday
Hours (EDT)
Unrestricted >

Sunday
Hours (EDT)
Unrestricted >

Continue

Back

1:13

← Review ×

First Name: Golon
Last Name: Drino
Email: Golon.drino@gmail.com
Username: GolonDrino1
Role: HR
Access Permission: Unrestricted

Confirm

Back

Review the new user's information, then click **"Confirm"**

Click **"Done"**. You will then see the Sub-user in your account dashboard.

1:14

New User Added ×

GolonDrino1 has been added as a new user. This user has been sent a temporary password that will expire in 24 hours.

Done

View User

+ Add New User



New Features



**Add and remove
permissions**



Restrict and set limits



**Grant access to all or
selected accounts**



**Fully customizable
to fit your needs**

**ENJOY MANAGING YOUR FINANCES
WITH THE CONVENIENCE YOU'RE
LOOKING FOR, ALL IN ONE PLACE.**

