Managing Users

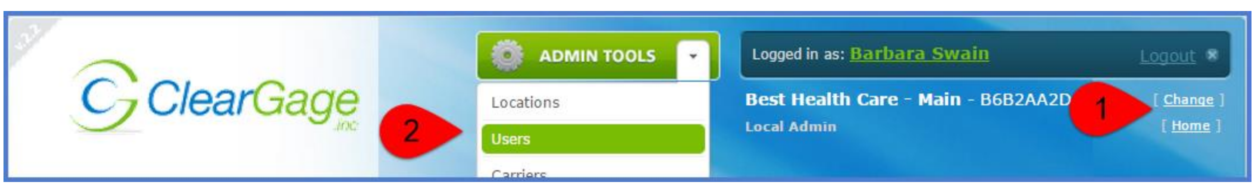
Contents

In order to Manage Users, you must have Local Admin permissions. We strongly recommend, for security purposes, that each user have their own individual login account. This will help to prevent the potential for any misuse if someone leaves your employ. Individual logins also provide for activity tracking in the system.

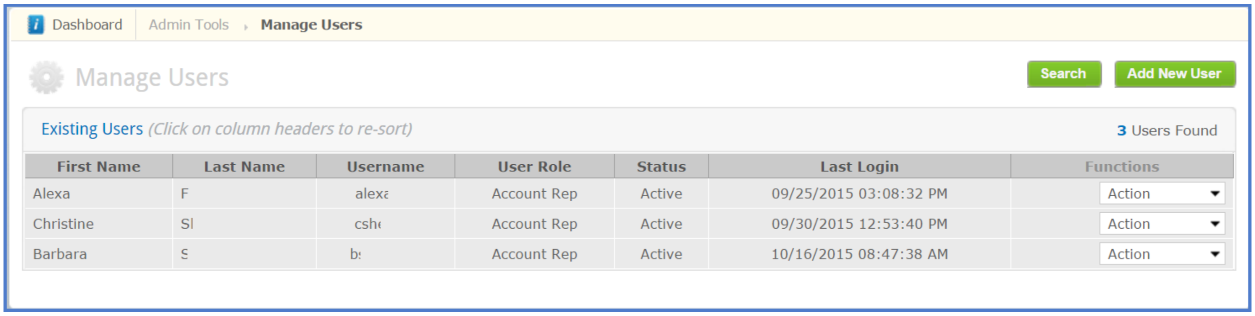
Managing users is done from the “Admin Tools” drop down in the upper portion of the Dashboard page.

IMPORTANT NOTE: If you have multiple locations it is important to decide first “where” the user should be added. If you wish to add the user to one location only, then it is necessary for you to be logged in at that *specific location* before adding the user.

Click “Change” and select the appropriate Location.
Click “Admin Tools” and select Users



The Manage Users screen will open listing your existing users.



To Add a New User.

1. Click the “Add New User” button and complete the required fields. Each user added must have a unique User ID and email address. If you use an ID or email address that is already in use you will receive an error message.
2. Select the appropriate User Role
3. Set the status as “Active”
4. Click “Save”

An automatic email will be generated and sent to the User’s email account. The email contains the login ID and temporary password as well as a link to click. When the link is clicked the User will be prompted to change their password.

To Edit an Existing User

1. In the Manage Users screen locate the User to be edited.
2. From the Action dropdown next to the User’s name select Edit
3. In the User Information screen make any necessary changes and click “Save Changes”

Password Resets

If a user requests that their password be reset you can check the “Generate a new password and email to user” check box. The User can then follow the instructions in the email to log in and create their new password.

IMPORTANT NOTE: Password must be a minimum of **8** characters **and** contain at least **1** number, **1** capital letter and **1** lower case letter.

Inactive Users

A User's status will be automatically changed to "Inactive" if they have not logged in within the last 90 days. This is a security measure.

To reset the user's status

1. Next to the User's name select "Edit" from the Action dropdown
2. In the User Status field select "Active" from the dropdown

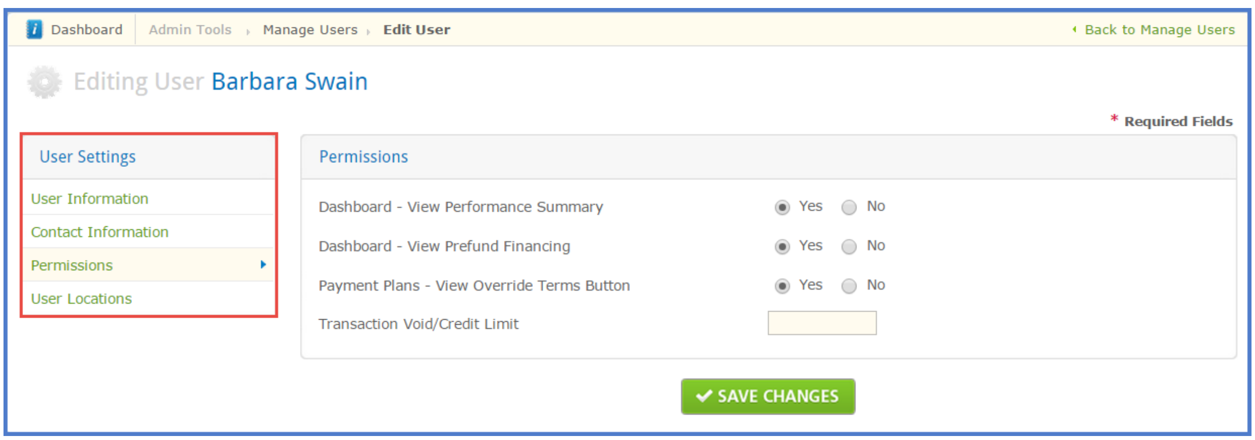
IMPORTANT NOTE: When resetting a user account to Active status the User ***must*** log in within 7 days of the reset being done otherwise the status will be automatically change back to Inactive.

Deleting Users

When employees leave, their user login should be deleted from the Payment Accelerator. This is particularly important if the new employee will be using the same email address. Do not simply change the user ID to the new person. This will result in all of the historical entries performed by that user ID being changed to reflect the new ID. It is recommended that you create a new user account for the new employee.

User Settings

Once in the Editing User screen there are several options provided in the left hand navigation.



User Information is the default screen and is used to edit existing user information.

Contact Information provides a place for you to enter address and phone information for the user.

Permissions (shown above) provides the ability to override some of the default settings for the User's Role. For example: An Account Rep role, by default has permission to see both the

Performance Summary and the Prefunding Financing information blocks on the Dashboard page. You may use the radio buttons here to turn that off on a per user basis.

You are also able to put an upper limit on the size of a refund that any one individual may process.

User Locations. If you are adding a User at your “Main” level and want that person to see 2 of your 3 other locations you can use the radio buttons to indicate which additional locations they may view.