

ADDING AND EDITING USERS

Please contact customer service at cs@ad-id.org, (704) 501-4410 or (704) 594-6285 for assistance.

Note: Only Administrators have the ability to add users or edit user permissions. If you are not an Administrator, please contact the Administrator of the group for assistance.

ADDING USERS

If you need to add a new user to your group, please follow these steps.

1. Click on the "Add users" button at the top of your home page.
2. Choose the group to which you would like to add a user from the group drop down list. (This only applies if you belong to more than one group.) Please note that the group you are currently in may not be the group that is automatically populated in the list. Be sure to check the drop down and make sure the appropriate group is chosen.
3. Using the Role drop down, choose whether the person will be a User or Administrator of the group.

Users: Allows the person limited access to the functions of the system. Users cannot add other users, edit user permissions, activate prefixes, etc. The default setting is that Users can create codes. Administrators can edit user permissions to edit only or view only in the Edit Users tab in Ad-ID by clicking on the Users name.

Administrators: Allows the person all functions of the system (create, edit, view codes; add and set permissions for users and groups; create reports, create prefixes, manage partnership options).

4. Type in the email address of the new User/Administrator. You can include multiple emails, by entering a comma separated list of emails. Be sure that the role you want for each person is the same if you are sending an invite to multiple emails.
5. Click on "Invite Now."
6. This will send an email to each email listed. The recipient can click on the link in the email, which will bring them to an Ad-ID sign up page where they will fill in their information. Once the sign up is complete, they will be added to the group.

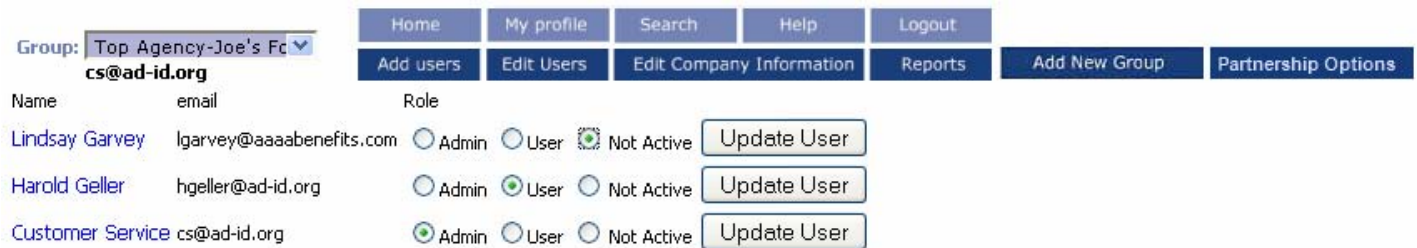


The screenshot shows the Ad-ID user management interface. At the top, there is a navigation bar with buttons for Home, My profile, Search, Help, Logout, Add users, Edit Users, Edit Company Information, Reports, Add New Group, and Partnership Options. Below this, the current group is identified as "Top Agency-Joe's Food Market" with the email "cs@ad-id.org". A list of instructions is provided: "Please select the group for which you want to invite other users.", "Enter a comma separated emails list of the people you want to invite.", "choose the role of the new user(s)", and "Click on 'Invite Now'". The form fields are: "Group Name:" with a dropdown menu showing "Top Agency-Joe's Food Market"; "Role:" with a dropdown menu showing "User", "Administrator", and "User"; "Emails:" with a large text area for entering email addresses; and an "Invite Now" button. Red arrows point from text labels to these specific elements: "Choose group from list" points to the Group Name dropdown, "Choose user role" points to the Role dropdown, "Enter email addresses" points to the Emails text area, and "Click to send email" points to the Invite Now button.

EDITING USERS

Editing User Role

1. Click on the “Edit users” button at the top of your home page.
2. To the right of the person’s name, click on Admin, User or Not Active. (Not Active means the person will no longer have access to this group. Contacts can not be deleted once they have been added.)
3. Click on “Update User” to the right of the name to save the change.



Group: Top Agency-Joe's Fc cs@ad-id.org

Home My profile Search Help Logout

Add users Edit Users Edit Company Information Reports Add New Group Partnership Options

Name	email	Role	
Lindsay Garvey	lgarvey@aaaabenefits.com	<input type="radio"/> Admin <input type="radio"/> User <input checked="" type="radio"/> Not Active	Update User
Harold Geller	hgeller@ad-id.org	<input type="radio"/> Admin <input checked="" type="radio"/> User <input type="radio"/> Not Active	Update User
Customer Service	cs@ad-id.org	<input checked="" type="radio"/> Admin <input type="radio"/> User <input type="radio"/> Not Active	Update User

Editing User Permission by Prefix

The ability to limit permissions was programmed in Ad-ID to match internal procedures. The default setting is always “Create.” This allows the user to create, edit and view codes. Permissions can be set to “Edit” where the user can only edit code information or view codes. If someone is set as “View” they can see the information but they cannot create codes or make edits. And if the permission is set as “None,” when the user signs in they won’t see that prefix listed on their home page.

1. Click on the “Edit users” button at the top of your home page.
2. Click on the person’s name for which you would like to make edits.
3. Choose whether the person can Create, Edit only, or View only the codes for each specific prefix. (The default setting is Create.)
4. Click on “Update User Access” to save changes.



Group: Top Agency-Joe's Fc cs@ad-id.org

Home My profile Search Help Logout

Add users Edit Users Edit Company Information Reports Add New Group Partnership Options

Prefix Access for Customer Service - cs@ad-id.org

Prefix Permissions

VZZZ	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input checked="" type="radio"/> Create
VZZV	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input checked="" type="radio"/> Create
VZZY	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input checked="" type="radio"/> Create
VZZU	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input checked="" type="radio"/> Create
VZVZ	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input checked="" type="radio"/> Create

Update User Access

Note: If the Administrator activates more prefixes in the group at a later date, the permissions for each user will have to be updated accordingly. The default setting for all prefixes activated in the group will be Create.

Editing User Permission by Ad-ID Code

Administrators can also set permissions by Ad-ID code. The permission denotes whether the user can or cannot see a particular Ad-ID code. The default setting is “Yes” where the user can see the code.

1. Click on the “Edit users” button at the top of your home page.
2. Click on the person’s name for which you would like to make edits.
3. Click on the appropriate prefix. This will list all of the codes created under the prefix.
4. Choose Yes or No for the codes listed. (The default setting is Yes).
5. Click on “Set Access” to save changes.



The screenshot shows the Ad-ID user management interface. At the top, there is a navigation bar with buttons for Home, My profile, Search, Help, and Logout. Below this is a secondary navigation bar with buttons for Add users, Edit Users, Edit Company Information, Reports, Add New Group, and Partnership Options. The main content area shows a dropdown menu for the Group, currently set to 'Top Agency-Joe's Fc cs@ad-id.org'. Below the group selection, the Prefix is set to 'VZVZ'. A table lists Ad-ID codes and their Access status:

Ad-ID	Access
VZVZ00010000	<input checked="" type="radio"/> Yes <input type="radio"/> No
VZVZ00020000	<input checked="" type="radio"/> Yes <input type="radio"/> No
VZVZ00030000	<input checked="" type="radio"/> Yes <input type="radio"/> No
VZVZ00040000	<input checked="" type="radio"/> Yes <input type="radio"/> No
VZVZ00050000	<input checked="" type="radio"/> Yes <input type="radio"/> No
VZVZ00060000	<input checked="" type="radio"/> Yes <input type="radio"/> No
VZVZ00070000	<input checked="" type="radio"/> Yes <input type="radio"/> No
VZVZ00080000	<input checked="" type="radio"/> Yes <input type="radio"/> No
VZVZ00090000	<input checked="" type="radio"/> Yes <input type="radio"/> No
VZVZ00100000	<input checked="" type="radio"/> Yes <input type="radio"/> No
VZVZ00110000	<input checked="" type="radio"/> Yes <input type="radio"/> No
VZVZ00120000	<input checked="" type="radio"/> Yes <input type="radio"/> No

At the bottom of the table, there is a 'Set Access' button.

Please see the Help section of the Ad-ID website for further assistance or contact Ad-ID customer service with questions.