Managing Account Access

Ad-ID codes are created at www.ad-id.org. In order to create a code, you must first have a group, prefix and account set up and associated to each other. This document will provide instructions on adding and editing users to an account. Accounts are used to deposit credits so that you can create prefixes and codes.

Users do not have to be given access to an account in order to utilize the account to create codes. If a user has access to a group to which the account is associated, they can create codes using the account. The Account Administrator can invite users to the Account. There is no limit on the number of users that can be given access to an Account. There are 4 permissions:

Read Only: Can view the account information and view the groups and prefixes associated with the account. This is subject to their permission to the group or prefix.

Edit Only: In addition to read only permissions, an Edit Only user can edit the account and billing information, use the calculator, deposit funds and view groups and prefixes associated to the account.

User: In addition to all actions permitted to Edit Only and Read Only users, a User can associate and disassociate groups and prefixes to the account.

Administrator: Can add, edit and remove users to the account. Set up account notifications and paperless invoicing and close the account. Administrators can see all groups, prefixes and users that have access to account.

Adding Users to Account(s)

1. To access the account, click on the Account name on the right side of your dashboard. Or go to the group home page and click on View Account List and click on the account name from the list.

From Dashboard
2. To add users, click on Invite a User.

3. Check off the Account or Accounts that you want to add the user to. You can add users to one or multiple Accounts. The Account you are currently in will automatically be checked off. Check off select all if you would like to add user to all Accounts.
4. Type in the email or emails of those you want to add. When doing multiple emails, separate them with a comma. Choose the Permission then click on Invite.
   a. If user being added already has an Ad-ID log in, they will automatically be added to the Account and will not need to do anything further.
   b. If the user does not have a log in, they will receive an email and will need to complete the registration process.

Removing and Editing User(s) from an Account

1. On the right side of the account home page, click on View Associated Users to see the users who have access to the account.
2. When viewing the associated user list, an Administrator can remove users from the account by clicking on the icon in the Actions column.

3. An Administrator can edit a user’s role by clicking on the icon in the Actions column.

4. Then select the role and click Update.

Please visit [www.ad-id.org](http://www.ad-id.org) to access additional help instructions or contact Ad-ID customer relations at 704-501-4410 or cs@ad-id.org.