

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](#)

DASHBOARD

Ad-ID Codes - Your recently created Ad-ID Codes.

Active Suspended

10 records per page Filter Codes:

Accounts		
Active		
Account	Credits	Actions
ADHL TV Codes	4600	+ - x
Valmor Inc	5100	+ - x
Ad-ID LLC	2920	+ - x

From Group

Ad-ID LLC-Valmor Inc

Ad-ID Codes - Ad-ID Codes recently created in this group (up to 1000).

Active Suspended

10 records per page Filter Codes:

<input type="checkbox"/>	Code	Title	Version	Advertiser	Brand	Product	Media Type	Length/Size	Created on
<input type="checkbox"/>	VALM0002000	Valmor		VALMOR CONFECTIONARY	VALMOR	CHOCOLATE & PEANUT BUTTER	Video	15	2012-12-13

- Edit
- Manage Address Book
- Invite Users
- Associate Accounts
- Associate Prefixes
- Associate Codes
- Disassociate Accounts
- Disassociate Prefixes
- Disassociate Codes
- View Account List**
- View Users List

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

Valmor Inc

Current Usage

Credits Available	5100
Credits Used	0
Credits Deposited	5100
Codes Created	0

Overall Usage

Credits Available	5100
Credits Used	0
Credits Deposited	5100
Codes Created	0

- Edit
- Deposit
- Calculator
- Associate a Prefix
- Disassociate a Prefix
- Associate a Group
- Disassociate a Group
- Invite a User**
- Notifications

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.

> Add users to this or other accounts

This will add the user(s) to the account(s) only. If the user needs the ability to create codes, please also add them to the appropriate group(s).

- | | | |
|--|--|------------------------------------|
| <input type="checkbox"/> Ad-ID, LLC | <input type="checkbox"/> ADHL 2 | <input type="checkbox"/> ADHL Inc |
| <input type="checkbox"/> ADHL TV Codes | <input type="checkbox"/> Agency Inc | <input type="checkbox"/> Brand Inc |
| <input type="checkbox"/> Soda Pop Co | <input type="checkbox"/> Soda Pop Co-Juicy | <input type="checkbox"/> Valmor |
| <input checked="" type="checkbox"/> Valmor Inc | <input type="checkbox"/> Valmor Test | |
- You may add users to any of these accounts
- Select all

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.

> Add a user to this account

Emails *

cs@ad-id.org,admin@ad-id.org

Enter emails to add, each separated by a comma.

Permission *

[Invite](#)

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.

Valmor

Current Usage	
Credits Available	4,560
Codes Available	121 ¹
Credits Used	360
Credits Deposited	4,920
Codes Created	9
Prefixes Created	0
Activation Date	10-28-2013
Anniversary Date	10-28-2014

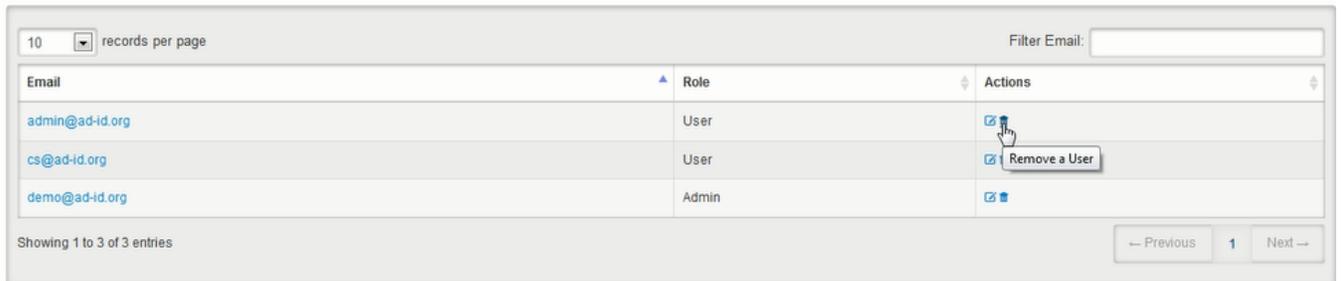
Overall Usage	
Credits Available	4,560
Credits Used	3,440
Credits Deposited	8,000
Codes Created	36
Prefixes Created	4
Activation Date	10-28-2013
Anniversary Date	10-28-2014

¹ Estimates for # of codes are calculated based on the status of the account at the time of calculation and may vary as a result of account usage and anniversary date.

- [Edit Account](#)
- [Deposit](#)
- [Calculator](#)
- [Associate a Prefix](#)
- [Disassociate a Prefix](#)
- [Associate a Group](#)
- [Disassociate a Group](#)
- [Invite a User](#)
- [Notifications](#)
- [Paperless Invoicing](#)
- [Invoice Log](#)
- [View Associated Groups](#)
- [View Associated Prefixes](#)
- [View Associated Users](#)
- [Close Account](#)
- [Delete Account](#)

- When viewing the associated user list, an Administrator can remove users from the account by clicking on the icon in the Actions column.

> Account Users

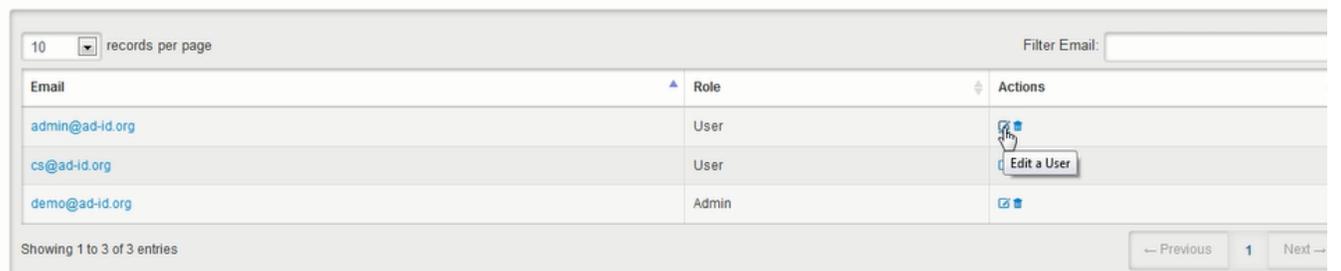


The screenshot shows a table with columns for Email, Role, and Actions. The 'Email' column contains 'admin@ad-id.org', 'cs@ad-id.org', and 'demo@ad-id.org'. The 'Role' column contains 'User', 'User', and 'Admin'. The 'Actions' column contains icons for 'Remove a User' and 'Edit a User'. A tooltip is visible over the 'Remove a User' icon for the 'cs@ad-id.org' row. The table is part of a larger interface with a 'Filter Email' search box and pagination controls.

Email	Role	Actions
admin@ad-id.org	User	
cs@ad-id.org	User	Remove a User
demo@ad-id.org	Admin	

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

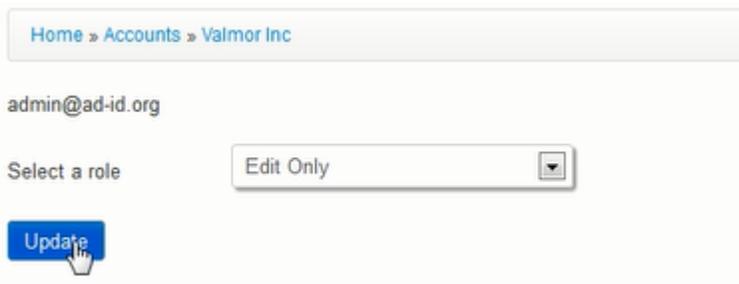
> Account Users



The screenshot shows the same table as above, but with a tooltip over the 'Edit a User' icon for the 'cs@ad-id.org' row. The interface elements are consistent with the previous screenshot.

Email	Role	Actions
admin@ad-id.org	User	
cs@ad-id.org	User	Edit a User
demo@ad-id.org	Admin	

- Then select the role and click Update.



The screenshot shows a form for updating a user's role. The breadcrumb path is 'Home > Accounts > Valmor Inc'. The email address 'admin@ad-id.org' is displayed. Below it, there is a label 'Select a role' and a dropdown menu currently showing 'Edit Only'. A blue 'Update' button is at the bottom, with a mouse cursor hovering over it.

Please visit www.ad-id.org to access additional help instructions or contact Ad-ID customer relations at 704-501-4410 or cs@ad-id.org.