Managing Account Access

This document will provide instructions on adding and editing users to an account.

The account Administrator(s) can invite users to the Account and edit their permission. There is no limit on the number of users that can be added to an Account. Users do not have to be given access to an account in order to utilize it to create codes.

There are 5 permissions:
Inherited Permission: Occurs when a user is not added directly to the account, but has permission to use the account and view certain information. This occurs when a user is added to a group which is associated to an account. If they are added to the group as an Administrator or User, they have permission to use the associated account to make purchases and create codes.

Read Only: 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 and purchase credits.

User: In addition to all Edit Only and Read Only permission, a User can associate and disassociate groups and prefixes to the account. This is subject to their permission to the group or prefix.

Administrator: Can add, edit and remove users with access to the account. Can add, edit and remove email recipients for notifications, invoices and statements. Close the account. Administrators can see all groups, and users that have access to account.

Adding Users to Account(s)

1. Click on the Accounts drop down menu from the top navigation bar.

2. Click on Manage Account Users.
3. The Account Users table shows everyone that has access to the account and their role. The Invited table shows everyone that has been invited to the account but has not registered on Ad-ID yet.

4. Click on the blue “Add a User” button.

5. Check off the account(s) that you want to add the user to. You can choose one account, multiple accounts or check the select all box.
6. Select the email addresses of those you want to add. When sending an email through the Ad-ID system, the system will save an email address after the email is sent and you can select from the saved addresses list. You may also enter other emails into the “Emails” field. When entering multiple emails in this field, separate them with a comma. Then choose the Permission and click on Invite Users.

   a. If the user already has an Ad-ID log in, they will automatically be added to the Account(s).
   b. If the user does not have a log in, they will receive an email and will need to complete the registration process.

   ![Image showing email addresses and permission selection]

   Click on one email or use Ctrl-Click (option click) to select multiple.

   Manually type in additional emails here. Separate each one with a comma.

   ![Image showing email invite process]

Editing a User’s Role for One or Multiple Accounts

1. Access the account for which you need to edit users. On the right side, click on Manage Account Users.

   ![Image showing Account Details]

   ![Image showing Account Users]

2. Click on the icon in the Actions column.

   ![Image showing user role editing]

   Edit
3. Check off the account(s) that you want to edit the role for the user. You can choose one account, multiple or check the select all box. Select the role and click Update.

![Select Role](image)

**Removing a User from One or Multiple Accounts**

1. Access the account for which you need to remove a user. On the right side, click on Manage Account Users.

   ![Manage Account Users](image)

2. Click on person’s email address.

   ![Click on email address](image)

3. Check off account or accounts to remove the person from.

   ![Check off accounts](image)

4. Click on Selected menu and choose “Remove User From Accounts”.

   ![Selected menu](image)
Allow/Disallow Users with Inherited Permissions to Make Purchases to an Account

Account administrators can manage whether those users with inherited permission are allowed to make purchases on the account. Inherited permissions occur when a user is not added directly to the account, but has permission to make purchases and view certain information.

1. Access the account. On the right side, click on Manage Account Users.

2. Scroll down to the Associated Group Users Table. Check off box next to the email address(s) and click on the Selections menu. Choose whether to allow or disallow the user to make purchases on the account. The default status is Allow.

   ![Associated Group Users Table]

If the Administrator disallows the user’s permission, the user can still create codes using available credits in the account, but they cannot make purchases to add more credits. If there are not enough funds in the account, the user will not be able to create codes.

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.