

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.

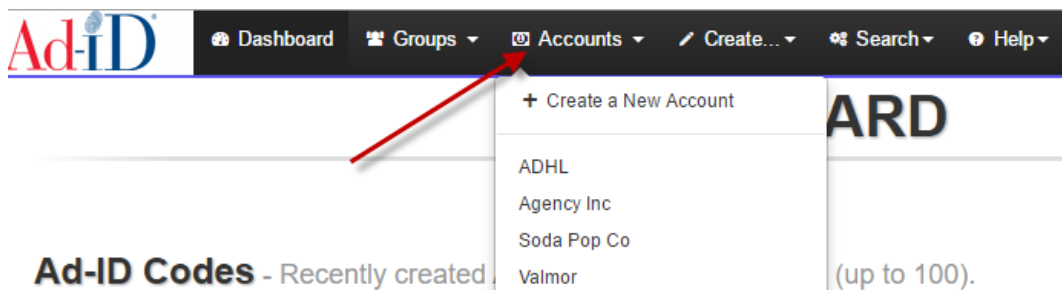
Edit Only: In addition to read only permissions, an Edit Only user can edit the account and billing information, use the calculator and purchase credits.

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.

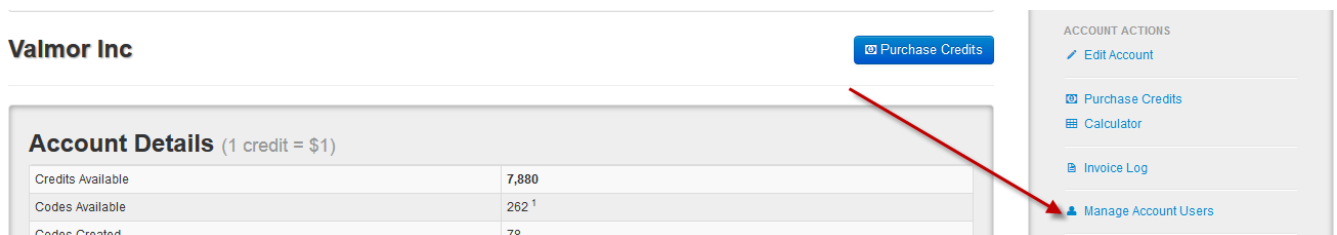
Administrator: Can add, edit and remove users with access to the account. Can add, edit and remove email recipients for notifications, invoices and statements. Close the account. Administrators can see all groups, and users that have access to account.

Adding Users to Account(s)

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



2. Click on Manage Account Users.



- 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.

> **Valmor Inc Account Users** - Showing all users in this account. + Add a User

Actions: Selected 10 records per page Filter Email:

<input type="checkbox"/>	Email	First Name	Last Name	Role	Actions
<input type="checkbox"/>	demo@ad-id.org	Customer	Service	Admin	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	demo@adidagencyn.com	Customer	Service	Admin	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	jwold@ad-id.org	Jarrett	Wold	Admin	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	training@ad-id.org	Customer	Service	Admin	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	info@ad-id.org	Customer	Service	User	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Showing 1 to 5 of 5 entries < -- Prev 1 Next -- >

> **Invited** - Showing new users invited to this account. Contact must register to access account.

10 records per page Filter Email:

Invited Email	Invited By	Invited On	Invited Role	Status
No data available in table				

Showing 0 to 0 of 0 entries < -- Prev Next -- >

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

> **Valmor Inc Account Users** - Showing all users in this account. + Add a User

Actions: Selected 10 records per page Filter Email:

<input type="checkbox"/>	Email	First Name	Last Name	Role	Actions
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- 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.

[Home](#)

<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 Co. Inc	<input type="checkbox"/> Agency Inc
<input type="checkbox"/> Agency inc-Classic Alarm Co	<input type="checkbox"/> Agency Inc-Hello Cellular	<input type="checkbox"/> agency testaccount
<input type="checkbox"/> Brand Inc	<input type="checkbox"/> Juicy	<input type="checkbox"/> Pepsi
<input type="checkbox"/> Soda Pop Co	<input type="checkbox"/> Soda Pop Co Inc	<input type="checkbox"/> Test Account
<input type="checkbox"/> Valmor	<input checked="" type="checkbox"/> Valmor Inc	<input type="checkbox"/> Zeef account

You may invite users to any of these accounts.

Select all this page

> **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).

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.

Permission * Administrator ?

Saved addresses
 cs@ad-id.org
 info@ad-id.org

Your list of previously saved addresses. Visit your [profile](#) to add or edit email addresses. Use ctrl-click (option-click) to select multiple addresses.

Emails
 addie@ad-id.org, codes@ad-id.org

Enter emails to add, each separated by a comma.

Invite Users Cancel Invite

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.

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.

Valmor Inc Purchase Credits

Account Details (1 credit = \$1)	
Credits Available	7,880
Codes Available	262 ¹
Codes Created	78

ACCOUNT ACTIONS

- [Edit Account](#)
- [Purchase Credits](#)
- [Calculator](#)
- [Invoice Log](#)
- [Manage Account Users](#)

2. Click on the icon in the Actions column.

Valmor Inc Account Users - Showing all users in this account. + Add a User

Actions: Selected 10 records per page Filter Email:

<input type="checkbox"/>	Email	First Name	Last Name	Role	Actions
<input type="checkbox"/>	demo@ad-id.org	Customer	Service	Admin	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.

Accounts to Assign Role

Ad-ID, LLC (Administrator) ADHL 2 (Administrator)

ADHL TV Codes (Administrator) Agency Inc (Administrator)

Juicey (Administrator) Soda Pop Co Inc (Administrator)

Valmor (Administrator) Valmor Inc (Administrator)

Only accounts with an existing role for the user are shown. To assign a role for this user on an account

Select all this page

New Role: **Select Role**

Update **Click Update**

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.

Valmor Inc Purchase Credits

Account Details (1 credit = \$1)

Credits Available	7,880
Codes Available	262 ¹
Codes Created	78

ACCOUNT ACTIONS

- Edit Account
- Purchase Credits
- Calculator
- Invoice Log
- Manage Account Users**

2. Click on person's email address.

Actions: Selected 10 records per page

<input type="checkbox"/>	Email	First Name
<input type="checkbox"/>	demo@ad-id.org	Customer
<input type="checkbox"/>	demo@adidagencyinc.com	Customer

Click on email address

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

Actions: Selected **Use to select all accounts**

10 records per page **Or check off accounts individually** Filter:

<input type="checkbox"/>	Account	Role	Actions
<input type="checkbox"/>	Ad-ID, LLC	Administrator	
<input type="checkbox"/>	ADHL 2	Administrator	

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

Actions: Selected **Click on arrow to display Actions**

Filter:

Action for selected accounts:

- Remove User From Accounts**
- Change Role to Administrator
- Change Role to User
- Change Role to Edit Only
- Change Role to Read Only

Choose action

<input type="checkbox"/>	Account	Role	Actions
<input type="checkbox"/>	ADHL Inc	Administrator	

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.

Valmor Inc Purchase Credits

Account Details (1 credit = \$1)

Credits Available	7,880
Codes Available	262 ¹
Codes Created	78

ACCOUNT ACTIONS

- Edit Account
- Purchase Credits
- Calculator
- Invoice Log
- 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 - Showing users with account access via group(s)

Actions: Selected 10 records per page

Action for selected users:

- Allow Purchases on Account
- Disallow from Making Purchases on Account

	Last Name	Group	Purchaser?	
<input checked="" type="checkbox"/>	Customer	Service	Wonderful Group	Yes
<input checked="" type="checkbox"/>	George	Testing	Wonderful Group	Yes

Showing 1 to 2 of 2 entries

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