Managing Prefix Access

This document will provide instructions on adding and editing users to a prefix. A prefix is a 4-character identifier licensed to a company and used at the beginning of each Ad-ID code.

The Prefix Administrator(s) can invite users to the Prefix and edit their permission. There is no limit on the number of users that can be given access to a Prefix. Users do not have to be given access to a prefix in order to create codes

There are 4 permissions:
Read Only: Can view the prefix information and export, email or print the prefix information.

Edit Only: In addition to read only permissions, an Edit Only user can edit the prefix information and view the groups and accounts associated to the prefix. This is subject to their permission to the group or account.

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

Administrator: Can add, edit and remove users to the prefix and see all groups, accounts and users that have access to the prefix. For unlocked prefixes, can manage the Parent list for the prefix. The creator of the prefix is automatically an Administrator of the prefix.

Adding Users to Prefix(es)

1. Scroll down on the prefix found below the Ad-ID codes table on your dashboard. Or go to the group home page and click on Prefix found below the Ad-ID codes table.

2. Click on Manage Prefix Users

3. The Prefix Users table shows everyone that has access to the prefix and their role. The Invited table shows everyone that has been invited to access the prefix but has not registered on Ad-ID yet.

4. Click on the blue "Add a User" button.

5. Check off the prefix(es) that you want to add the user to. You can choose one prefix, multiple prefixes 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 Prefix(es).
   b. If the user does not have a log in, they will receive an email and will need to complete the registration process.

Editing a User's Role for One or Multiple Prefixes

1. Access the prefix for which you need to edit users. On the right side of the prefix home page, click on Manage Prefix Users.
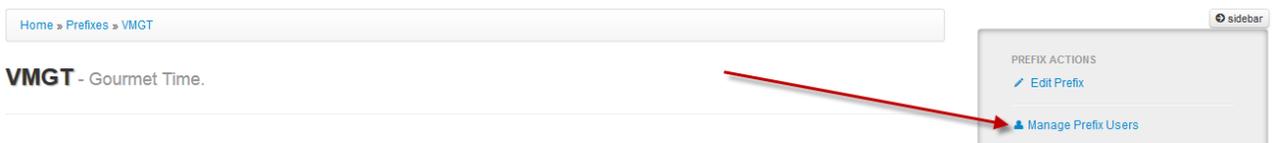
2. Edit a user's role by clicking on the icon in the Actions column.

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

Removing a User from One or Multiple Prefixes

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

2. Click on the person's email address.

3. Check off the prefix or prefixes you want to remove the person from.

4. Click on Selected arrow at the top of the table and choose the "Remove User From Prefixes" Action.

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.