

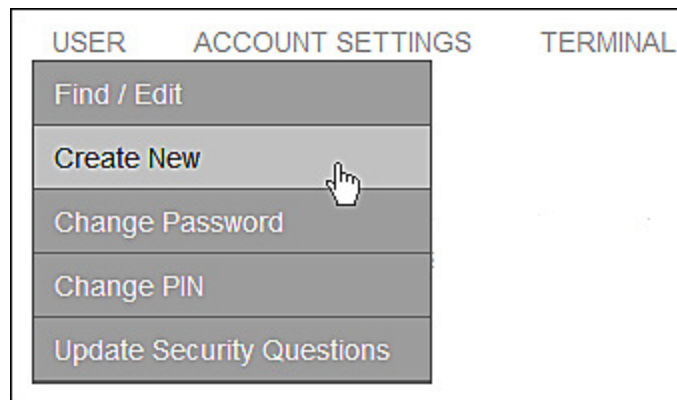
Follow these procedures to create a user account:

- Create new user account
- Assign new user rights
- Add terminal associations to the user profile
- Create new user account from existing user profile
- Copy terminal associations to a new user

To Create New User Accounts

To create a new user account follow these steps:

1. Select User | Create New.



The Create New User screen displays.

Create New User

Complete all information and click Create at the bottom of the form to create a new user account. Note that all fields with an asterisk (*) are required.

Enter New User Information

User Information

User ID: *

Password: *

Confirm Password: *

First Name:

Last Name:

Location:

Phone:

Extension:

Email: *

Active:

Supervisor: *

Notes:

- All fields with an asterisk are required.
 - Refer to the Password Requirements section in the *Converge Getting Started Guide* for password requirements information.
-

2. Enter the user's User ID.
 3. Enter the user's Password.
 4. Re-enter the user's password in the Confirm Password field.
-

Note: The next five fields are not required, but you can enter this information for the user if you wish: First Name, Last Name, Location, Phone number, and phone Extension.

5. Enter the user's Email address.

6. Select Yes or No from the drop-down list to indicate if Active.

Examples of new users who would not be active would be new hires that have not yet started work or employees out on medical leave. This field is set to Yes by default.

7. Select Supervisor from the drop-down list.

Note: The default Supervisor is the current user's Supervisor or the Merchant Administrator, if the user logged in is the Merchant Administrator.

8. Click Create User to add the new user account.

The New User Confirmation screen displays the fields that you entered on the Create New User screen along with a message to confirm that the user ID added successfully.

New User Confirmation

This page is used to confirm the new user information.

Clerk1 - Added successfully.

New User

User Information	
User ID:	Clerk1
First Name:	Jane
Last Name:	Doe
Location:	Any City
Phone:	999-999-9999
Extension:	
Email:	Any_email@email.com
Active:	Active
Supervisor:	Manager

Rights **Terminals**

Note: Click Clear to clear all data entered on the Create New User screen.

To Assign Rights to a User

User rights are specific access and permissions granted to a user. To assign rights to a user follow these steps:

1. On the New User Confirmation screen, click Rights.

New User Confirmation

This page is used to confirm the new user information.

Clerk1 - Added successfully.

New User

User Information	
User ID:	Clerk1
First Name:	Jane
Last Name:	Doe
Location:	Any City
Phone:	999-999-9999
Extension:	
Email:	Any_email@email.com
Active:	Active
Supervisor:	Manager

The Edit User Rights screen displays.

The screenshot shows the 'Edit User Rights' interface for user 'Clerk1'. The page title is 'Edit User Rights' with the subtitle 'Update an existing user's rights'. Below this is a header 'Update Rights for: Clerk1'. A 'Default Selection Options' section contains a dropdown menu and the text '(You may still make individual selections)'. The main area is titled 'Virtual Terminal - Transactions' and contains a grid of checkboxes for various transaction types: Credit Card-Sale, Credit Card-Return, Credit Card-Inquiry, Credit Card-Force, Credit Card-Auth Only, Credit Card-AVS Only/Verification, Credit Card-Recurring, Credit Card-Installment, Credit Card-Multientry, Credit Card-Import Batch, and Recurring Import Batch. Below this is a section for 'Export Transactions' with a checkbox and a 'Level 3' section with another checkbox. At the bottom are three buttons: 'Update', 'Clear All', and 'Cancel'.

Note: The user rights that display in this window are dependent on the user rights of the user currently logged in. You cannot grant a right to a subordinate unless your profile has the right to do so.

2. In the Default Selection Options drop-down list, select one of the following:

- Standard
- Manager
- Administrator

Notes:

- The default is a blank value. No options are selected.
- When you select either Standard, Manager or Administrator, you still have the option to manually select and de-select user rights.
- The rights within each section are described in the Glossary section of the *Converge Getting Started Guide*.

If you selected Standard, the system selects all rights with the exception of the following:

- Rights within the Virtual Terminal-Transactions section associated with any Return, Credit, Activation, Reload, and Import Batch transaction types
- Rights within the Virtual terminal – Tokenization section
- Rights within the Virtual Terminal-Batch section
- Rights within the Virtual Terminal-Export Script section
- Rights within the User Management section
- Rights within the Terminal Management section

If you selected Manager, the system selects all rights with the exception of the following:

- Rights within the User Management section
- Rights within the Terminal Management section
- Rights for the Virtual Terminal-Export Script for the manager

If you selected Administrator, the system selects all rights.

Note: If you click Cancel, the window closes and the user rights that were selected are not updated. If you click Clear All, all the users rights will be reset (unchecked).

3. Click Update.

The New User Confirmation screen displays a message that the rights for that user ID updated successfully.

New User Confirmation

This page is used to confirm the new user information.

Clerk1 - Rights Updated successfully.

New User

User Information	
User ID:	Clerk1
First Name:	Jane
Last Name:	Doe
Location:	Any City
Phone:	999-999-9999
Extension:	
Email:	Any_email@email.com
Active:	Active
Supervisor:	Manager

Notes:

- The Default Selection Options (such as Manager) are not saved with the user rights. This pre-set saves you time and allows you not to have to click each user right individually.
 - The rights are not saved until you click the Update button.
-