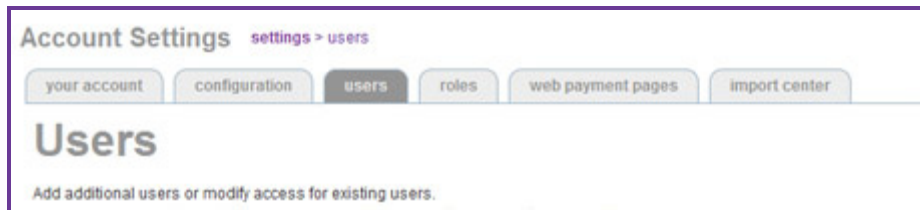


How to Add Users

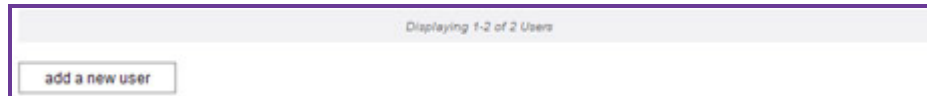
Your PaySimple account comes configured with one Master Administrator User. You can add as many users to your account as required. For security reasons, User IDs and passwords should never be shared. Be certain that each person who needs to access your PaySimple account is provided with their own User ID. There are no additional fees for multiple users.

Follow these steps to add a new user:

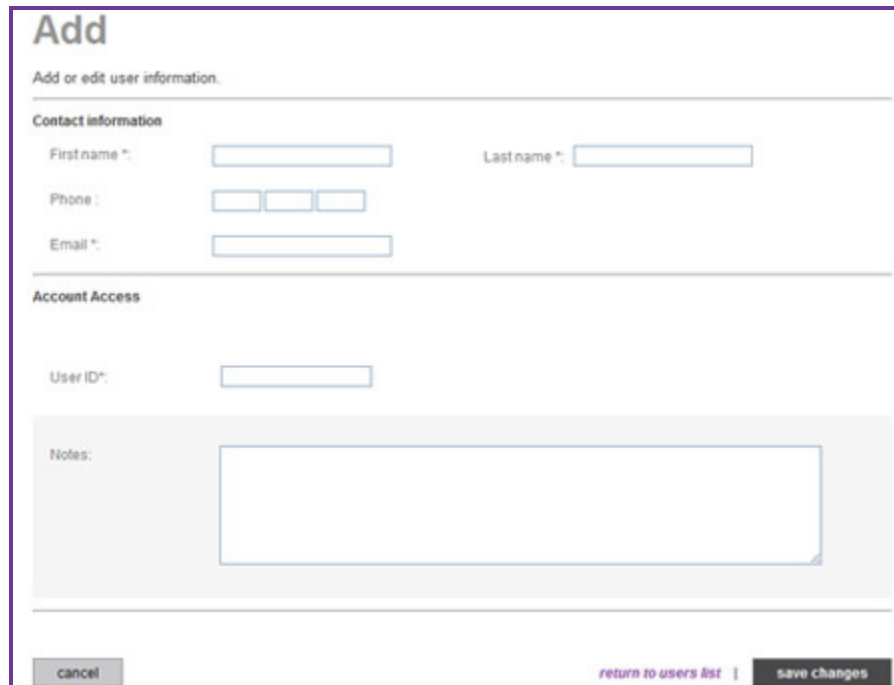
1. Access the **users** screen by clicking the “Settings” link in top navigation, then click the **users** tab.



2. At the bottom of the **users** dashboard, click the “add a new user” button.

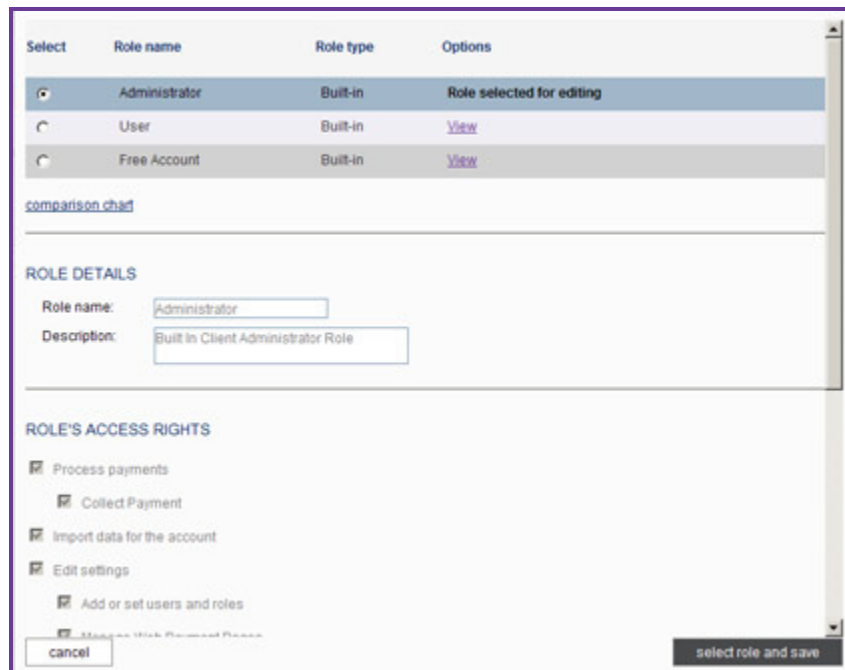


3. The **Add** User screen opens, as shown below:

A screenshot of the 'Add' user form. The title is 'Add' and the subtitle is 'Add or edit user information.'. The form is divided into two sections: 'Contact information' and 'Account Access'. Under 'Contact information', there are input fields for 'First name *', 'Last name *', 'Phone', and 'Email *'. Under 'Account Access', there is an input field for 'User ID*'. At the bottom of the form is a large 'Notes' text area. At the very bottom, there are three buttons: 'cancel', 'return to users list', and 'save changes'.

4. Enter the user's **First name** and **Last name**. (Required)
5. Enter the user's **Phone** number. (Optional)
6. Enter the user's **Email** address. (Required)
 TIP: Double check that you have the correct email address, since this is the address to which the user's temporary password and any future password resets will be sent.
7. Enter a **User ID**, which must contain at least 6 characters. (Required)
 TIP: This **User ID** must be unique in the entire PaySimple system, not just within your account. Keep this in mind when creating it. Using an email address is typically a safe choice.

 TIP: Once you save a user the User ID assigned cannot be changed. Thus, it is a good idea to make sure that the person for whom you are creating a PaySimple user account is happy with the User ID before saving it.
8. Enter **Notes** about the user in the provided text area. (Optional)
9. Click the "save changes" button to continue. (Or click the "cancel" button to discard the user and return to the **users** dashboard.)
10. The **Please Select Role** pop-up screen will open.



11. Select the radio button for the role you want to assign to the new user.
 TIP: When you select a radio button the permissions granted to that role will be displayed in the **ROLE DETAILS** and **ROLE'S ACCESS RIGHTS** sections. You cannot edit roles from this screen. (See Roles in Chapter 8 of the PaySimple User Guide for a description of the built-in roles, and for instructions on how to add, edit, and delete custom roles.)
12. Click the "select role and save" button to create the user. (Or click the "cancel" button to discard the user and return to the **users** dashboard.)

- a. If there is an error, you'll see an error message indicating elements that need to be corrected. Click "ok" to close the error message and return to the **Add User** screen. Make the required correction(s) and click the "save changes" button at the bottom of the screen to continue.
13. You will return to the **Users** dashboard, and the user you just created will be at the bottom of the **Users** table, with a status of "Active."

The screenshot shows the 'Users' dashboard with a table of users. The table has the following columns: Last, First, User ID, Role, Phone, Email, Status, and Action. There are three rows of users listed.

Last	First	User ID	Role	Phone	Email	Status	Action
Test	April	apriltest	Administrator	800-555-12...	sally.sam...	Active	Edit
Sample	Sally	julytest	User		lisa@pays...	Active	Edit
Test	januar...	januaryt	Administrator		sally.sam...	Active	Edit

14. The system will send one email to the new user containing the User ID and login url. A second email will be sent containing a temporary one-time-use password.
- TIP:** These emails will be sent to the email address entered in the **Email** field when the user was created. If the emails are not received, double check that the email address was entered correctly. If it was, have the person check SPAM and junk folders for the email.

Once a user is created and activated, that user can log in immediately. You can also edit, disable, or delete the user as required. (See *Users* in *Chapter 8* of the *PaySimple User Guide* for detailed instructions on how to perform these functions.)