

1. Log into the <u>Authorize.net</u>.

login.authorize.net	
Authorize.Net	
	Log In
	Username
	Password
	LOG IN
	Forgot Username Forgot Pasoword

Select Account from the main toolbar.
 Tip: You can also select User Administration in the main left-side menu.

Authorize	Net		TEEDBACK	Welcon	ne: TestFirstName TestLas
HOME	TOOLS	REPORTS	TRANSACT	ION SEARCH	ACCOUNT

3. On the next screen select + Add User.

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Select + Add User to create a new user account, or select the radio button next to the user you would like to edit or for which you would like to perform an action.

+ Add User			
Name		Туре	Status
TestFirstNan	ne TestLastName	Account Owner	Active

4. Then, select the type of user you would like to add from the User Role drop down.

Settings Billing Information Statements	User Role User Profile Help
User Administration User Profile Digital Payment Solutions	Select a User Role for the new user from the list below. Each User Role is defined by a group of permissions to Merchant Interface features and functionality. <u>View a detailed comparison of User Roles and their associated permissions</u> . Once you have selected a User Role, you may further modify permissions for the new user, then click Next. You may edit the new user's User Role and/or permissions at any time.
	User Roles User Role: - Select One -



User Role Definitions - The following five default user roles are available for your payment gateway account. Except for Account Owner, these user roles can be customized by modifying the user's permissions.

Role Name	Definition
Account Owner	An Account Owner is the top-level user, has irrevocable access to all features of the Merchant Interface and manages all other user accounts. Only an Account Owner can create another Account Owner.
Account Administrator	By default, an Account Administrator has all Merchant Interface permissions except for the ability to enable or disable payment gateway services or manage Account Owner user accounts. An Account Administrator can also manage other user accounts except for Account Owners.
Transaction Manager	By default, a Transaction Manager can perform all transaction processing functions in the Merchant Interface.
Account Analyst	By default, an Account Analyst can only view and download Merchant Interface statements and reports.
Account Contact	An Account Contact does not have access to the Merchant Interface and is created solely to receive account notification emails.

All user roles (except for Account Contact) have the following basic, non-editable rights in the payment gateway:

- a. **Basic interface access:** User can log on to the Merchant Interface, view the home page, announcements, help files and contact Customer Support.
- b. Edit own user profile: User can edit own contact information, password, secret question and answer, and subscribe to notification and administrative emails.
- c. **View account information:** User can view payment gateway account information, services, payment methods and reseller contact information.
- d. View transaction information: User can view unsettled transactions, transaction details, Automated Recurring Billing (ARB) subscriptions, and file upload statuses for regular and ARB transactions.
- e. View reports: User can view and download transaction summaries, transaction settlement reports, statistics reports and returned items reports.



User Permissions

The following table further describes the account permissions associated with each user role.

\checkmark	Default permission; not editable	\checkmark	Default Permission; editable	0	Permission not applicable to the user role

	Account	Account Administrator	Transaction Manager	Account Analysis	Account Contact
TRANSACTION PROCESSING PERMISSIONS	Owner	Administrator	Manager	Anarysis	contact
Create charge transactions: Ability to charge a credit card or bank account	\checkmark	\checkmark	\checkmark	0	${igodot}$
Create refund/void transactions: Ability to refund a credit card or bank account.	\checkmark	\checkmark	\checkmark	${igwedge}$	0
Manage existing transactions: Ability to void transactions, submit PRIOR_AUTH_CAPTURE, and accept or decline AFDS transactions.	~	\checkmark	\checkmark	0	\otimes
Upload transaction batch file: Ability to upload transaction batch files	\checkmark	\checkmark	\checkmark	0	${igodot}$
Manage CIM profiles: Ability to add, edit and delete CIM profiles.	\checkmark	\checkmark	\checkmark	${igwedge}$	0
Manage ARB subscriptions: Ability to create, edit, upload, delete, and search Automated Recurring Billing (ARB) subscriptions	\checkmark	\checkmark	\checkmark	0	\otimes



	Account Owner	Account Administrator	Transaction Manager	Account Analysis	Account Contact
Settings Permissions					
Edit transaction format settings: Ability to edit the settings for Batch File Upload, Cut-off Time, Time Zone, Virtual Terminal, Payment Form, Receipt Page, Email Receipts, Simple Checkout, Transaction Version, Response/Receipt URLS, Silent Post URLs, Relay Response and Direct Response. Also the ability to configure the Verified Merchant Seal.	~	~	\bigotimes	\bigotimes	0
Update transaction security settings: Ability to create the API Login ID, update the Transaction Key and Signature Key, enable and disable File Upload Capabilities and configure MD5 Hash. Also the ability to run the Merchant Interface in Test Mode.	~	~	\bigotimes	0	0
Edit basic fraud settings: Ability to edit Card code Verification (CCV) and Address Verification Service (AVS) settings.	\checkmark	\checkmark	\mathbf{O}	\otimes	${igodot}$
Edit AFDS settings: Ability to edit the Advanced Fraud Detection Suite (AFDS) Filter settings, AFDS Customer Response and Internet Protocol (IP) tools.	\checkmark	\checkmark	\bigotimes	\bigotimes	0
Manage mobile devices	\sim	\checkmark	0	0	\mathbf{O}



	Account Owner	Account Administrator	Transaction Manager	Account Analysis	Account Contact
ACCOUNT PERMISSIONS					
Update business information: Ability to edit credit card and bank account billing information and business information.	~	\checkmark	0	0	0
Manage account services: Ability to enable or disable products and services.	\checkmark	\otimes	${igodot}$	0	\odot
View account finances: Ability to view account statements, fee definitions, and risk profile.	~	\checkmark	\checkmark	\checkmark	0
Access eCheck NOC report: Ability to view and download eCheck.Net Notices of Change (NOC) Report.	~	\checkmark	\checkmark	\checkmark	0
	Account Owner	Account Administrator	Transaction Manager	Account Analysis	Account Contact
Coser IVIANAGEMENT PERMISSIONS					
user account users: Ability to add, edit and delete user accounts, user permissions and notification emails; reset passwords, secret questions and answers; and unlock users.	\checkmark	\checkmark	0	0	0
Close account: Can close the payment gateway account by contacting Customer Support. To initiate the request, the user must be able to verify specific account information.	~	\checkmark	\mathbf{O}	0	0



5. To further customize the new user account, click to deselect the boxes next to the user permissions that should not be enabled. Then, select **Next** to continue.

	User Role User Profile
Add	l User Help
Select	a User Role for the new user from the list below. Each User Role is defined by a group of permissions to Merchant Interface es and functionality. <u>View a detailed comparison of User Roles and their associated permissions.</u>
Once y User F	you have selected a User Role, you may further modify permissions for the new user, then click Next. You may edit the new user's tole and/or permissions at any time. * Required Fields
User	Roles
	User Role: Account Administrator * What is this?
User	Permissions
The Ad manage the Ac	ccount Administrator role is intended for managerial or supervisory employees who oversee transaction and/or user account gement for the payment gateway account. All user permissions are enabled by default but can be modified based on the scope of count Administrator's responsibilities.
Trans	action Processing Permissions
-	Create charge transactions
Line	r Delee
Use	I Roles
	User Role: Account Administrator * What is this?
Use	r Permissions
The A mana the A	Account Administrator role is intended for managerial or supervisory employees who oversee transaction and/or user account gement for the payment gateway account. All user permissions are enabled by default but can be modified based on the scope of ccount Administrator's responsibilities.
Tran	saction Processing Permissions
	Create charge transactions Charge a credit card or bank account
	Create refund transactions Refund a credit card or bank account
	Update unsettled transactions Void transactions, submit previously authorized transactions for capture, approve or decline FDS transactions
	Manage ARB subscriptions Create, edit, upload, and delete ARB subscriptions (includes Create charge transactions permission)
	Manage CIM profiles Add, edit and delete CIM profiles
Setti	ngs Permissions
	Edit transaction format settings Edit batch file upload, cut-off time, Simple Checkout, time zone, Virtual Terminal, payment form, receipt page, Verified Merchant Seal, Partial Authorization, and email receipt settings
	Update transaction security settings Update transaction key and password, password-required mode, test mode, processor configuration, MD5 hash, and WebLink settings and enable/disable file upload capabilities
	Edit basic fraud settings Edit Basic Card Code Verification (CCV) and Basic Address Verification Service (AVS) settings
~	Edit AFDS settings Edit AFDS filter settings, Enhanced Card Code Verification (CCV), Enhanced Address Verification Service (AVS) and Internet Protocol (IP) tools
	Manage mobile devices Allow user to manage mobile devices within Merchant Interface.
Acco	unt Level Permissions
	Update business information Edit credit card and bank account billing information and business contact information
•	View account finances View account statements, fee definitions, and risk profile
	View/download eCheck.Net NOC reports View and download eCheck.Net NOC reports
Use	Management Permissions
	Manage account users Add, edit, and delete users and permissions and unlock users
C	ancel Next >



6. Create a **Login ID** for the new user that contains at least six (6) characters and is a combination of letters and numbers, the Login ID should be easily remembered as it cannot be changed later. Include contact information for the new user.

Note: Account Contacts cannot access the Merchant Interface and therefore do not require a Login ID.

Add User	User Role User Profile	Help
User Information		
Login ID:	*	
First Name:	* Last Name: *	
Title:	×	
Phone:	* Extension:	
Mobile:		
Email Address :	*	

Select the checkboxes to choose the types of email notifications you would like the user to receive and then select Submit to continue.

 Administrative Announcements Technical Notices New Products and Promotions Newsletters Newsletters Mobile Device Pending Notices ansaction Receipt Transaction Receipt Upload Transaction Receipt Upload File Summary Report Credit Card Settlement Report eCheck. Net Settlement Report Fraud Detection Suite (FDS) Per Suspicious Transaction 	eneral r	ayment Gateway Emails
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 Subscription Due for Expiration Credit Card Expiration Subscription Suspension Subscription Expiration Subscription Termination 		Failed Transaction Notice
 Credit Card Expiration Subscription Suspension Subscription Expiration Subscription Termination 		Subscription Due for Expiration
 Subscription Suspension Subscription Expiration Subscription Termination 		Credit Card Expiration
Subscription Expiration Subscription Termination		Subscription Suspension
Subscription Termination		Subscription Expiration
		Subscription Termination
		Use this email address as reply-to.



7. Click **Request Pin** to have PIN sent to your email address associated with your ID. Then, enter the pin in the space provided and select **Verify Pin**.

Verify Your Identity For security purposes, we'll need to verify your identity. Request Pin Verify Pin
Request a PIN We'll send you a PIN to verify your identity.
Email Address : mi****@townebank.net
CANCEL REQUEST PIN
Not Your contact info?

8. When Pin is verified successfully you will see Identify Verified. Select **Continue** to proceed.



- 9. After verifying, a message will appear notifying you that the user has been successfully created. The message will also display the new user's **Login ID** and **Email Address.**
- 10. The new user will then receive a user activation email with a link to complete the set up for their user profile and password, along with verifying user information. **Important: the activation email will expire after 24 hours**

