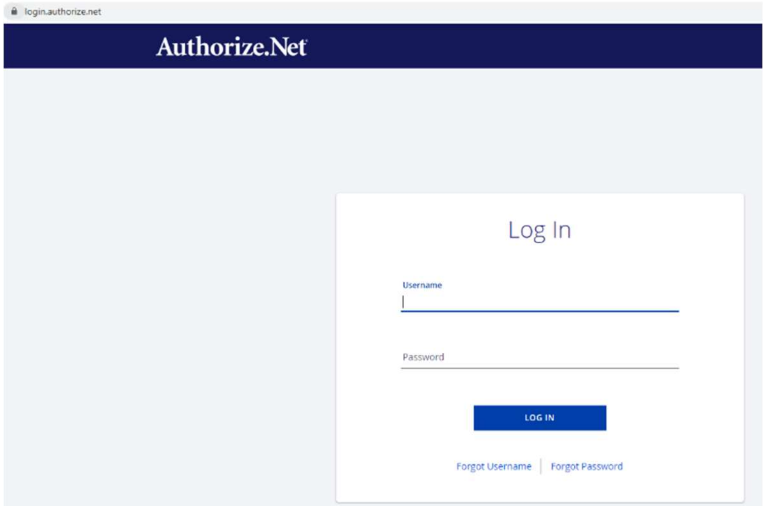
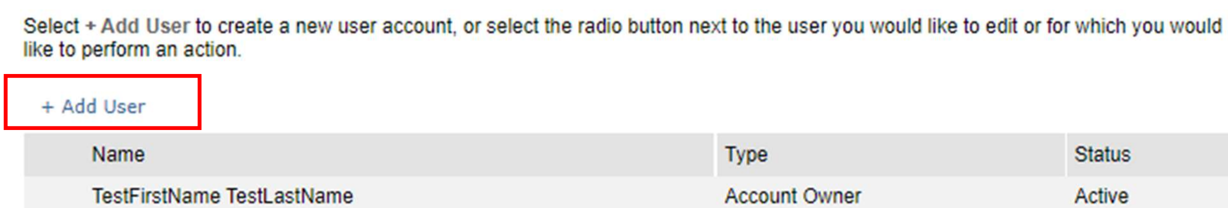
Authorize.net
How to Add & Edit Users

1. Log into the Authorize.net.

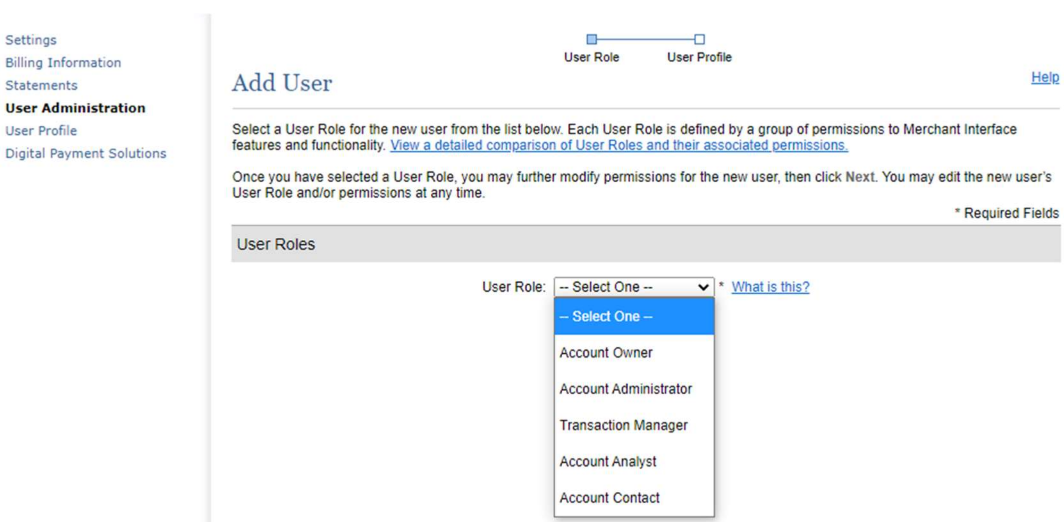


2. Select **Account** from the main toolbar.
   Tip: You can also select **User Administration** in the main left-side menu.

3. On the next screen select **+ Add User**.



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



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.

✔	Default permission; not editable	✓	Default Permission; editable	🚫	Permission not applicable to the user role

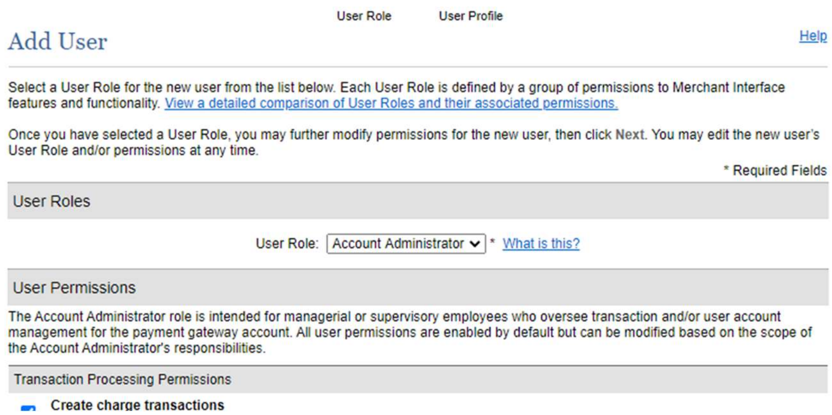
	Account Owner	Account Administrator	Transaction Manager	Account Analysis	Account Contact
Transaction Processing Permissions					
Create charge transactions: Ability to charge a credit card or bank account	✔	✓	✓	🚫	🚫
Create refund/void transactions: Ability to refund a credit card or bank account.	✔	✓	✓	🚫	🚫
Manage existing transactions: Ability to void transactions, submit PRIOR_AUTH_CAPTURE, and accept or decline AFDS transactions.	✔	✓	✓	🚫	🚫
Upload transaction batch file: Ability to upload transaction batch files	✔	✓	✓	🚫	🚫
Manage CIM profiles: Ability to add, edit and delete CIM profiles.	✔	✓	✓	🚫	🚫
Manage ARB subscriptions: Ability to create, edit, upload, delete, and search Automated Recurring Billing (ARB) subscriptions	✔	✓	✓	🚫	🚫

	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.	✓	✓	⊘	⊘	⊘
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.	✓	✓	⊘	⊘	⊘
Edit basic fraud settings: Ability to edit Card code Verification (CCV) and Address Verification Service (AVS) settings.	✓	✓	⊘	⊘	⊘
Edit AFDS settings: Ability to edit the Advanced Fraud Detection Suite (AFDS) Filter settings, AFDS Customer Response and Internet Protocol (IP) tools.	✓	✓	⊘	⊘	⊘
Manage mobile devices	✓	✓	⊘	⊘	⊘

Account Permissions	Account Owner	Account Administrator	Transaction Manager	Account Analysis	Account Contact
Update business information: Ability to edit credit card and bank account billing information and business information.	✓	✓	⊘	⊘	⊘
Manage account services: Ability to enable or disable products and services.	✓	⊘	⊘	⊘	⊘
View account finances: Ability to view account statements, fee definitions, and risk profile.	✓	✓	✓	✓	⊘
Access eCheck NOC report: Ability to view and download eCheck.Net Notices of Change (NOC) Report.	✓	✓	✓	✓	⊘

User Management permissions	Account Owner	Account Administrator	Transaction Manager	Account Analysis	Account Contact
Edit account users: Ability to add, edit and delete user accounts, user permissions and notification emails; reset passwords, secret questions and answers; and unlock users.	✓	✓	⊘	⊘	⊘
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.	✓	✓	⊘	⊘	⊘

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 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 features and functionality. View a detailed comparison of User Roles and their associated permissions.

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.

* Required Fields

User Roles

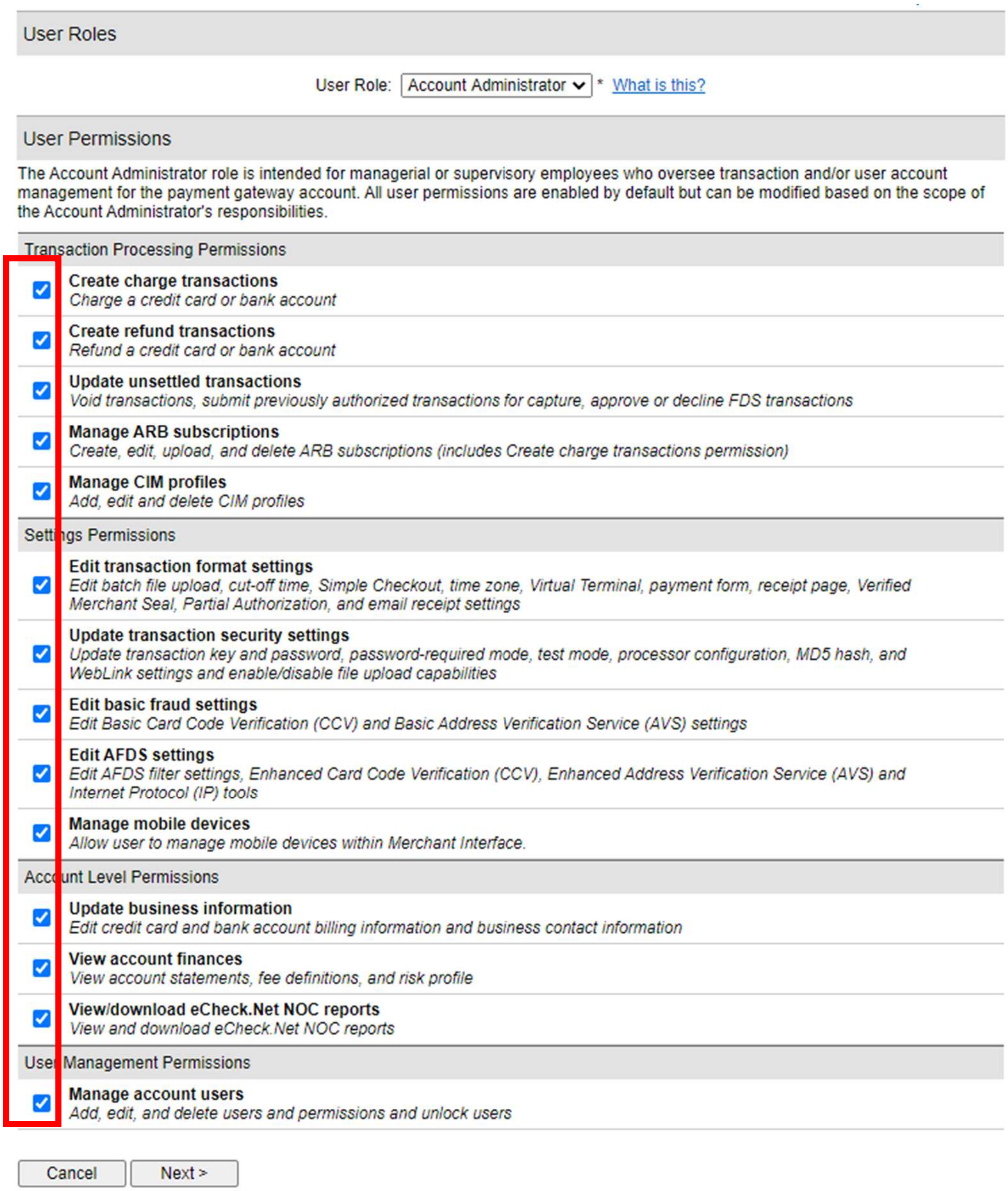
User Role: Account Administrator * What is this?

User Permissions

The Account Administrator role is intended for managerial or supervisory employees who oversee transaction and/or user account management for the payment gateway account. All user permissions are enabled by default but can be modified based on the scope of the Account Administrator's responsibilities.

Transaction Processing Permissions

Create charge transactions



User Roles

User Role: Account Administrator * What is this?

User Permissions

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Transaction 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*

Settings 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.*

Account 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*

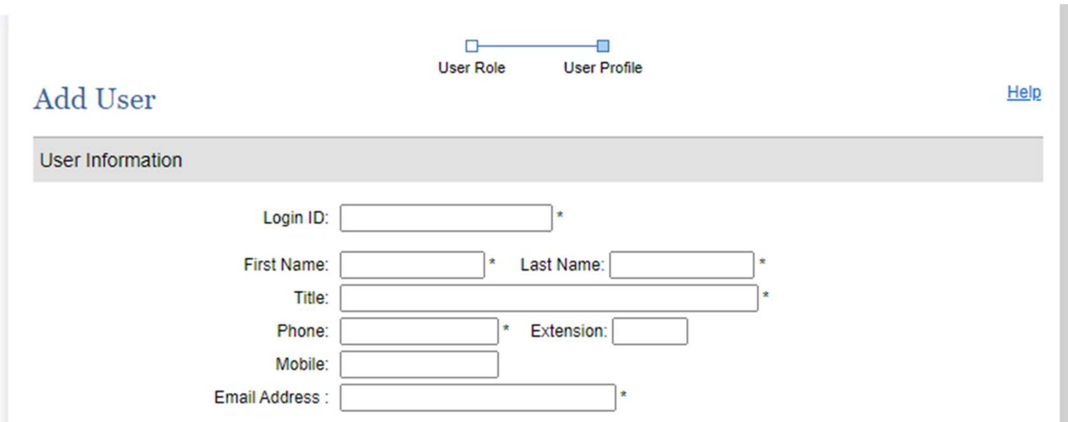
User Management Permissions

- **Manage account users** — *Add, edit, and delete users and permissions and unlock users*

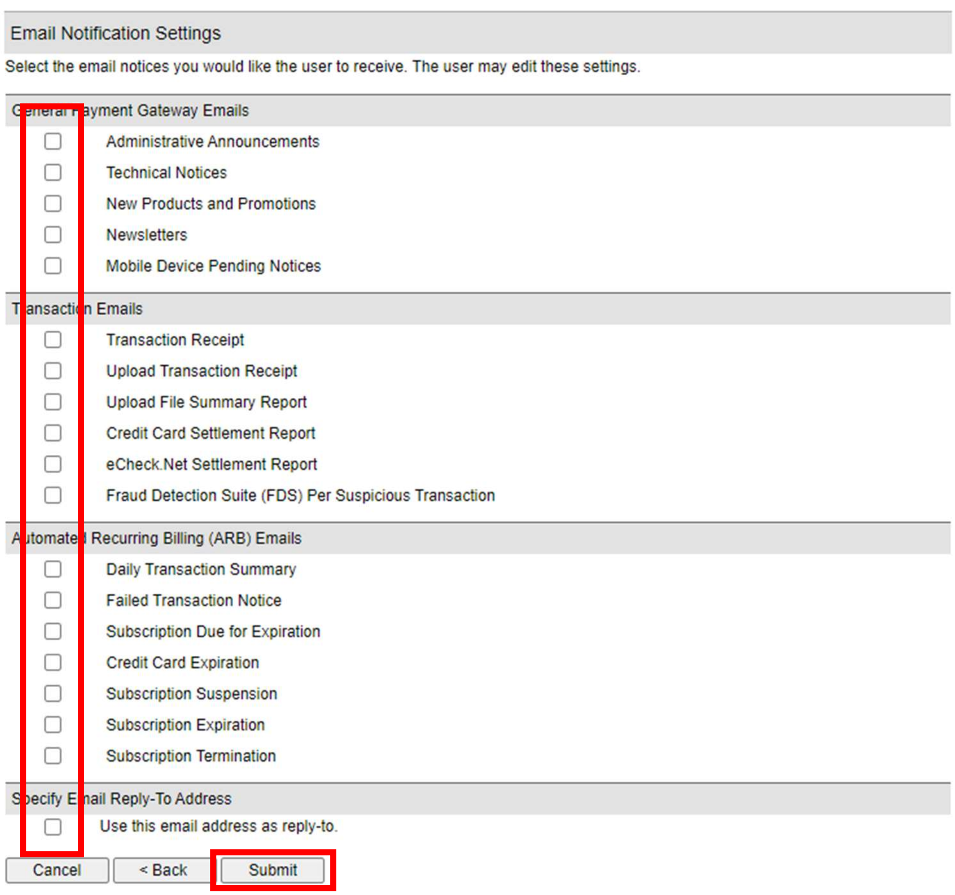
Cancel | Next >

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.

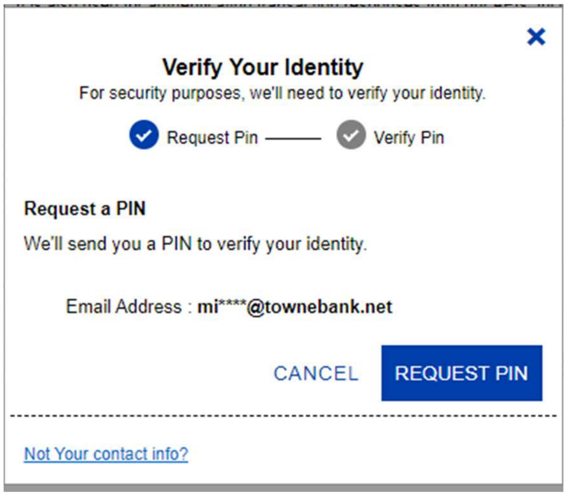
Note: Account Contacts cannot access the Merchant Interface and therefore do not require a Login ID.



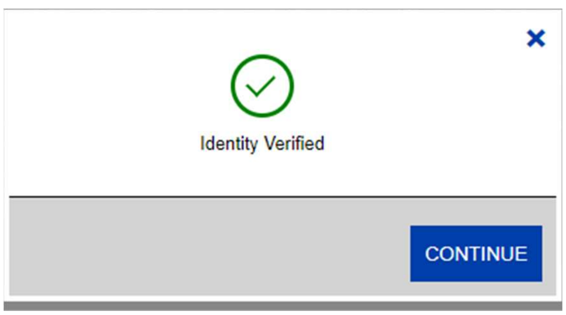
Select the checkboxes to choose the types of email notifications you would like the user to receive and then select Submit to continue.



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.**



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**