



MerchantTrack

User Creation Guide

OVERVIEW

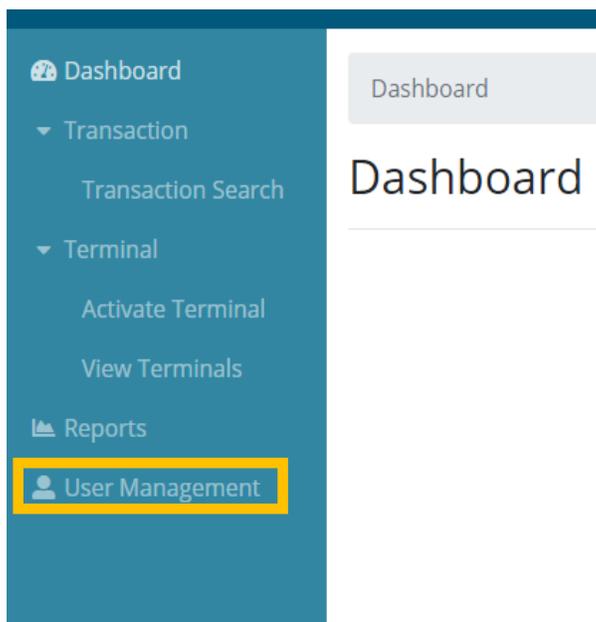
This guide provides step-by-step actions for creating new MerchantTrack users, including:

- Creating the user
- Configuring user claims/permissions
- Assigning user merchant(s)

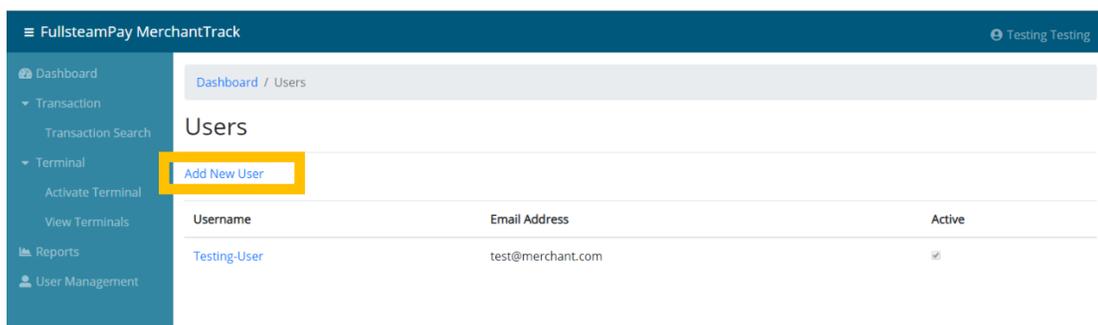
Note: Only existing users with “User Management” enabled are allowed to create new users. If you are logging into MerchantTrack for the first time, you will be asked to create a new password for your account before you can perform any other functions.

Creating a New MerchantTrack User

1. Log in to MerchantTrack with your username and password.
2. From the MerchantTrack dashboard, click **User Management** on the left-side menu.



3. On the **Users** page, click **Add New User**.



4. On the **Create User** page, complete the fields on the page, and click **Create**.

Note: The password you enter will be the user's temporary password, which be changed on their first login attempt.

The screenshot shows the 'Create User' form in the MerchantTrack software. The interface has a dark teal sidebar on the left with navigation options: Dashboard, Transaction (with Transaction Search), Terminal (with Activate Terminal and View Terminals), Reports, and User Management. The main content area has a breadcrumb trail 'Dashboard / Users / Create User' and a title 'Create User'. The form contains the following fields: Username (Testing123), Password (masked with dots), First Name (John), Last Name (Smith), Email Address (test@test.com), and Phone Number (555555555). At the bottom, there are 'Cancel' and 'Create' buttons, with the 'Create' button highlighted by a yellow border.

- Once the user is created, you will be redirected to the **User Details** page.

On this page, you can change a user's password, unlock a user's account, update a user's claims/permissions, and update the merchants assigned to a user.

Click **Update User Claims**.

The screenshot displays the 'User Details' page. On the left is a navigation sidebar with options like Dashboard, Transaction, Terminal, Reports, and User Management. The main content area shows the breadcrumb 'Dashboard / Users / User Details' and the title 'User Details'. Below this is a list of user attributes: Username (Testing123), Partner (Testing), First Name (John), Last Name (Smith), Email Address (test@test.com), Phone Number (5555555555), Active status (checked), Created By (Testing-User), Created (UTC) (4/3/2019 9:11:14 PM), Last Updated By (Testing-User), Last Updated (UTC) (4/3/2019 9:11:14 PM), User is Locked (unchecked), and Locked Until (UTC). To the right of these details is an 'Actions' menu containing links for 'Back to List', 'Update User', 'Change User Password', 'Update User Claims' (highlighted with a yellow box), and 'Update User Merchants', along with a red 'Deactivate User' button. At the bottom of the page, there are sections for 'User Merchants' and 'User Claims', and a footer with the copyright notice 'Copyright © Fullsteam Operations LLC 2019'.

6. The **User Claims** page will allow you to specify the user's permission(s). To enable claims/permissions, check the claim(s) you wish to provide the user, and then click **Save**.

The available permissions are:

- **Transaction Search:** This enables users to search for transactions by ID, Date, etc.
- **Reverse Open Transactions:** Users with this claim are able to reverse transactions that have not appeared in a batch (i.e., "open" transactions).
- **Reverse Settled Transactions:** This claim enables users to reverse a transaction that has already settled in a batch.
- **Reporting:** With this claim, users are able to run transaction reports related to the merchant(s) associated with their account.
- **User Management:** This claim enables users to add, edit and delete other users. It should only be enabled for Administrative-level users.

The screenshot shows the 'User Claims' configuration page. On the left is a navigation sidebar with options: Dashboard, Transaction (with sub-option Transaction Search), Terminal (with sub-options Activate Terminal and View Terminals), Reports, and User Management. The main content area has a breadcrumb trail: Dashboard / Users / User Details / User Claims. Below the breadcrumb is the title 'User Claims' and the text 'Manage Claims for Testing123'. A list of permissions is shown with checkboxes: Transaction Search, Reverse Open Transactions, Reverse Settled Transactions, Reporting, and User Management. The 'Transaction Search' checkbox is highlighted with a yellow box. At the bottom of the form are 'Cancel' and 'Save' buttons, with the 'Save' button also highlighted with a yellow box.

- When the previous step is complete, the **User Details** page will now display the user claims you previously selected.

To complete the user setup, click **Update User Merchants** to add the merchant(s) associated with the user.

The screenshot shows the 'User Details' page for a user named 'Testing123'. The page is divided into a left sidebar with navigation options and a main content area. The main content area displays user details and an 'Actions' menu. The 'Update User Merchants' link in the 'Actions' menu is highlighted with a yellow box. At the bottom right, a yellow box highlights the 'User Claims' section, which includes a 'Transaction Search' input field.

User Details	
Username	Testing123
Partner	Testing
First Name	John
Last Name	Smith
Email Address	test@test.com
Phone Number	5555555555
Active	<input checked="" type="checkbox"/>
Created By	Testing-User
Created (UTC)	4/3/2019 9:11:14 PM
Last Updated By	Testing-User
Last Updated (UTC)	4/3/2019 9:11:14 PM
User is Locked	<input type="checkbox"/>
Locked Until (UTC)	

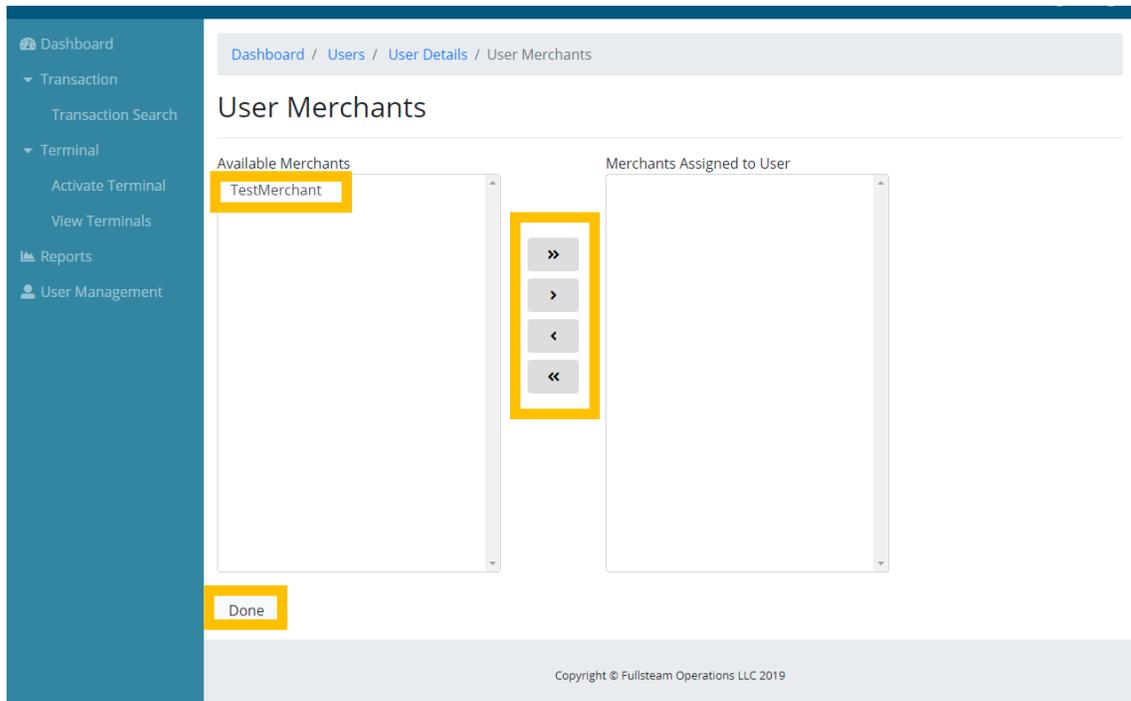
Actions	
Back to List	
Update User	
Change User Password	
Update User Claims	
Update User Merchants	
Deactivate User	

User Merchants	User Claims
	Transaction Search

- On the **User Merchants** page, click one of the Available Merchants listed in the left panel, and use the arrows to assign one or more merchant(s) to a user.

The double arrow (>>) will assign all available merchants to the user. The single arrow (>) will assign one merchant at a time. The number of available merchants will depend on your configuration, and it is possible for only one merchant to appear in the list.

When all applicable merchants have been added to the user, click **Done** to save.



The new user is now setup and ready to access MerchantTrack.