MerchantTrack

User Creation Guide

OVERVIEW

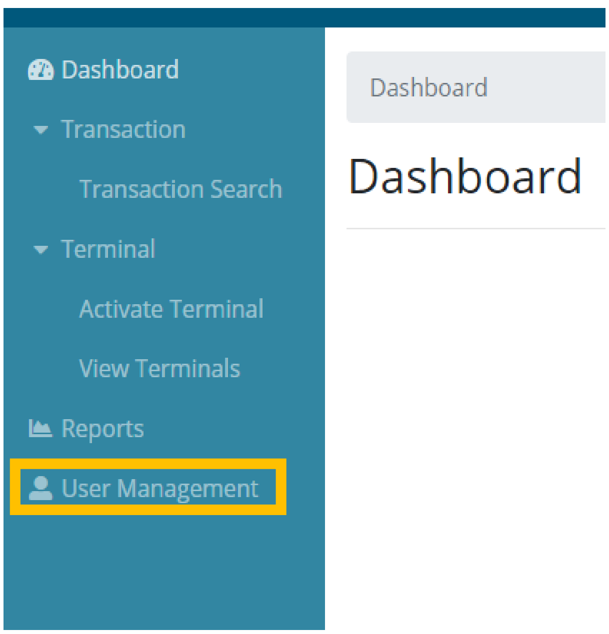
This guide provides step-by-step actions for creating new MerchantTrack users, including:

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

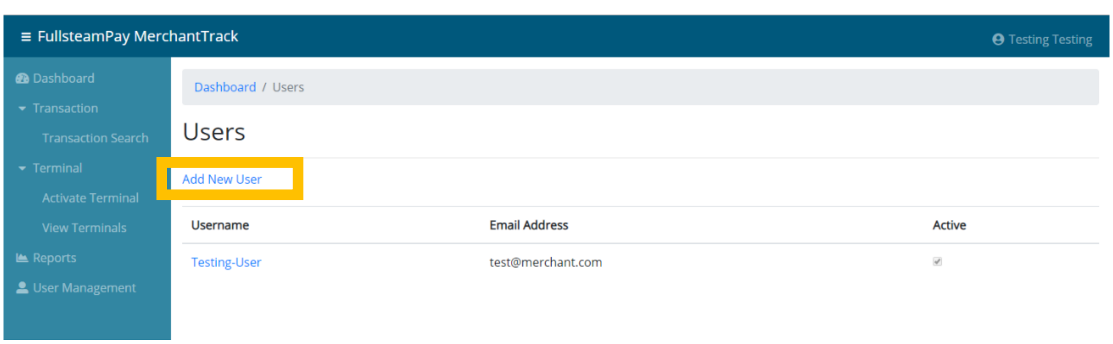
Note: Only existing users with "User Management" enabled are allowed to create new users. If you are logging into MerchantTrack for the first time, you will be asked to create a new password for your account before you can perform any other functions.

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.

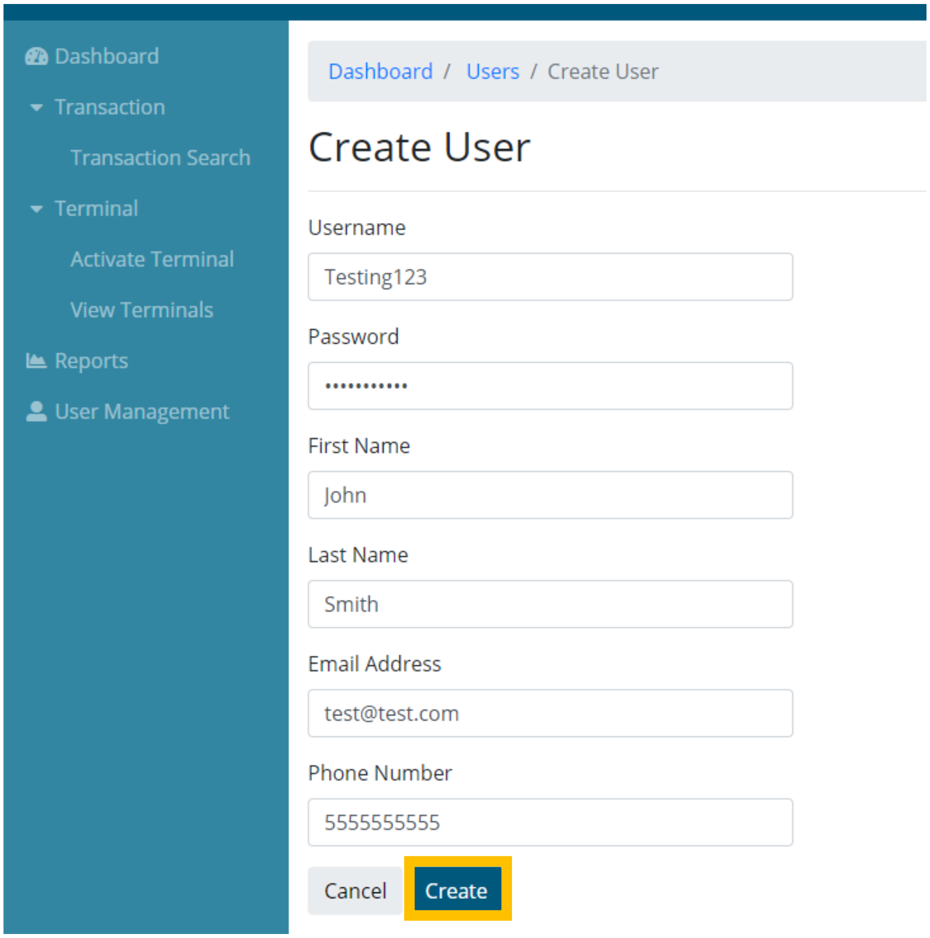


3. On the **Users** page, click ***Add New User***.



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

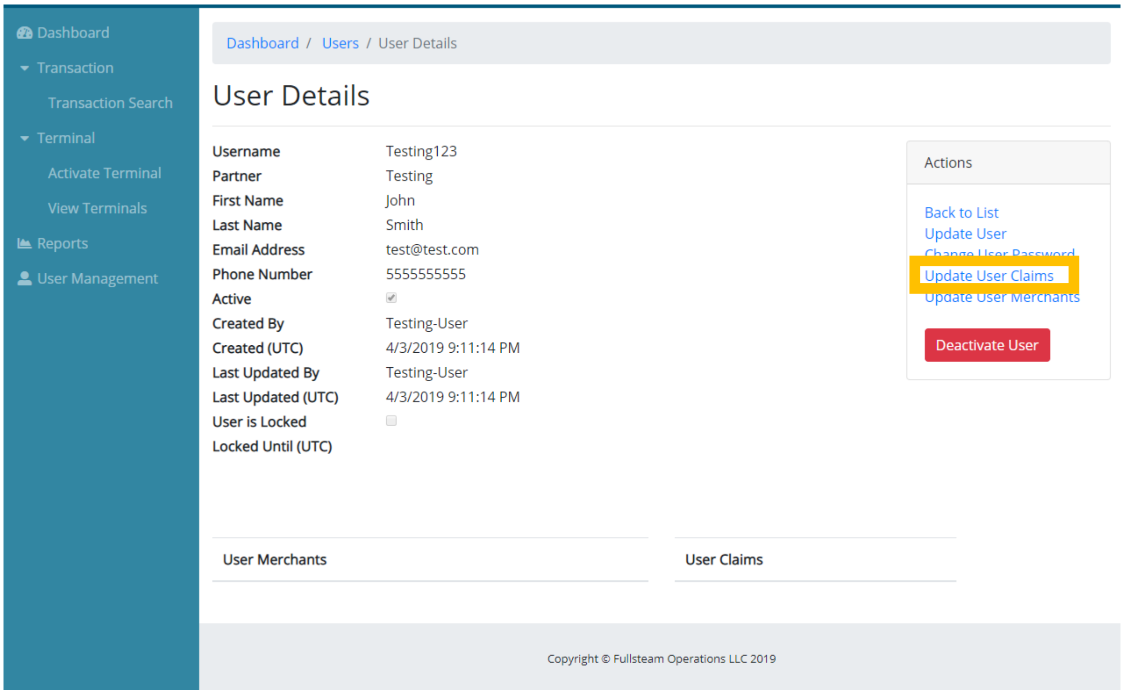
Note: The password you enter will be the user's temporary password, which be changed on their first login attempt.



5. 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.

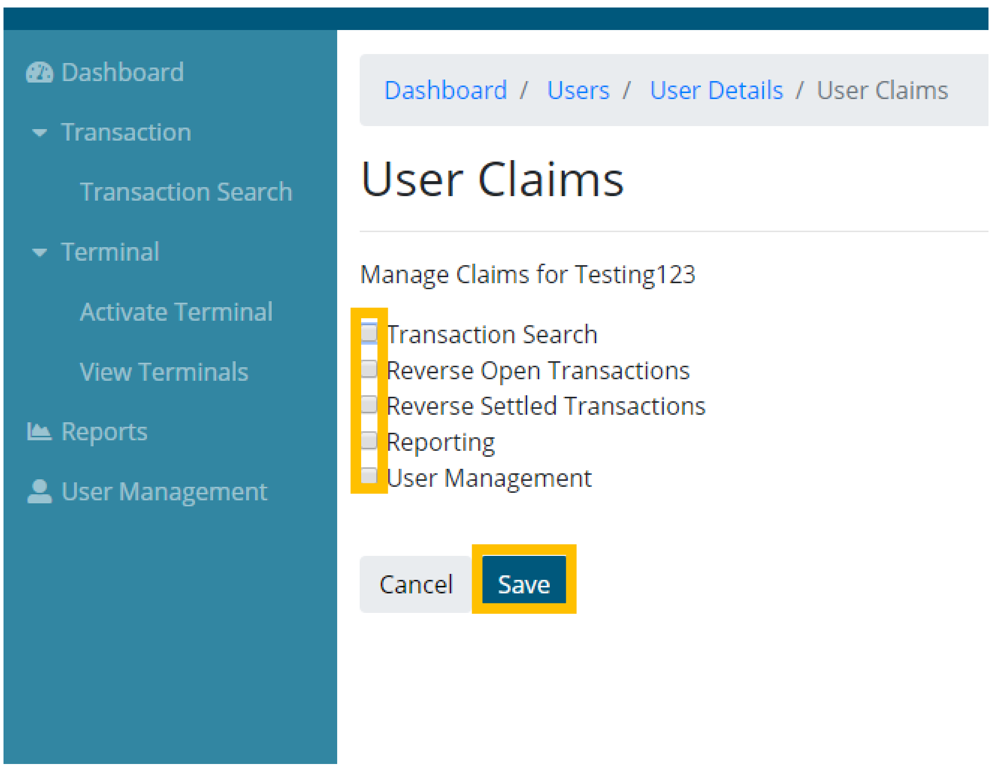
   Click ***Update User Claims***.



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.***

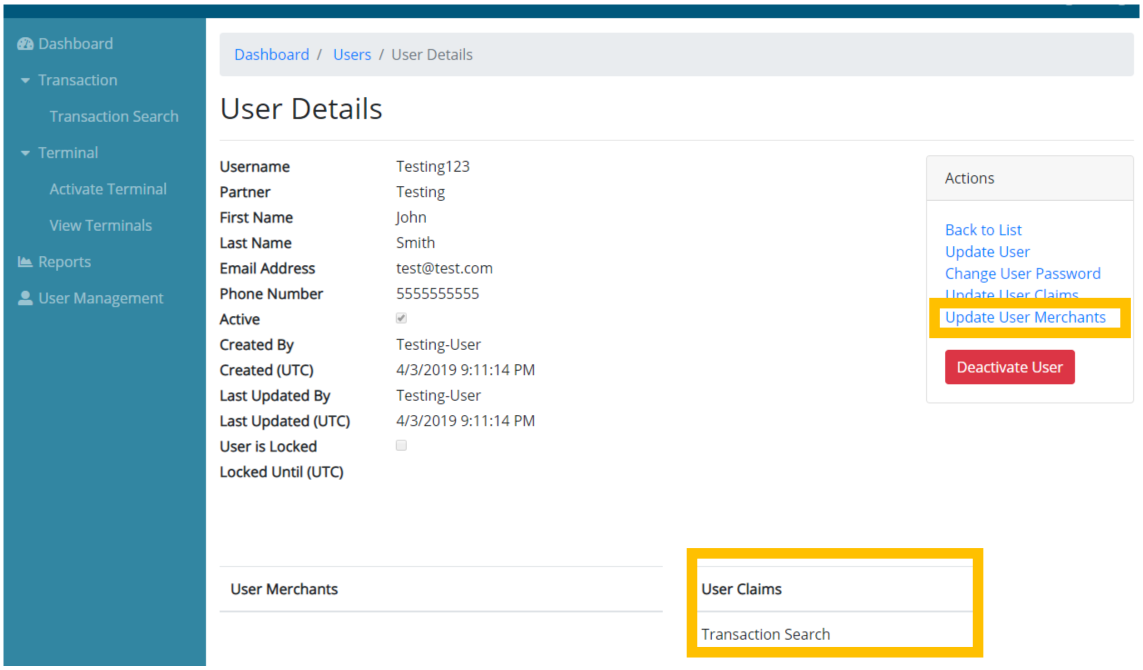
   The available permissions are:

   - **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.



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

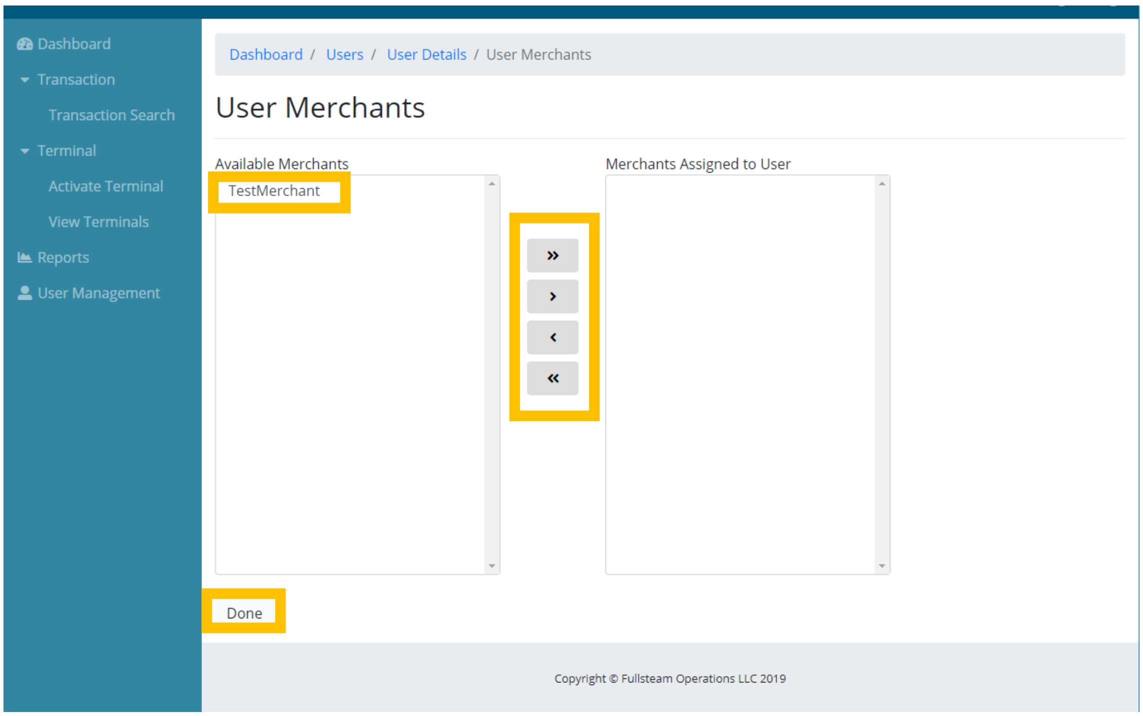
   To complete the user setup, click ***Update User Merchants*** to add the merchant(s) associated with the user.



8. 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.