



an InvoiceCloud Service

Add and Remove Staff Access

Easily Manage Your PSN Account Access

As the administrator on your account, YOU control which of your staff has access to the PSN Account Management Center (AMC) and what level of access they have.

For security purposes, it is very important to give **each user a unique User ID and password** and to delete staff that you no longer want to have access to the AMC (i.e. they have left your employment).



Types of Roles/Access Levels

- **Administrator:** Can do everything a Reader and Processor can do, plus: Sets up users and gives permission levels; cancel/stop payments; and issue refunds.
- **Processor:** Can view everything, process payments, schedule Auto-Pays, upload/download data (including e-Bills, attachments) and submit Auto-Call campaigns. For any account non-integrated account, this person can also add buildings or services. (i.e. add another property or a parking fee option for the payers to choose.)
- **Reader:** A “look but don’t touch” role. This person can view everything, but the only thing they can change is their password.

How to Add Staff Members – One Account

1. **Sign into PSN** – RT account you wish to add them as a user on
2. Click the **ACCOUNT MANAGEMENT** tab
3. Select **“Add and Maintain User Information”** in the drop-down menu
4. **To add a user**, select **Add New User**
 - a. Complete: the users first name, last name, role, email address, and phone number
5. Under Login Information
 - a. Complete: User ID and a password for the person
 - i. We suggest using the first initial of the first name and the last name (no spaces).
 - b. Create a password – between 7 and 20 characters.
 - c. Verify password
6. Click Save

How to Add Staff Members – Multiple Accounts (Manage from CP Account)

1. **Sign into PSN** – Log into the CP Account
2. You can add person to individual RT accounts – as many as you would like by repeating process below
 - a. You must navigate to each individual RT account to provide access for user
3. Click the **ACCOUNT MANAGEMENT** tab and select **View and Edit Account List** in the drop-down menu
4. Click the box to the right of the RT you wish to access and click **View/Edit** (at the bottom of the page)
 - a. Click the **ACCOUNT MANAGEMENT** tab and select **“Add and Maintain User Information”** in the drop-down menu
 - b. Select **“Add and Maintain User Information”** in the drop-down menu
 - c. **To add a user**, select **Add New User**
 - i. Complete: the users first name, last name, role, email address, and phone number
 - d. Under Login Information
 - i. Complete: User ID and a password for the person
 1. We suggest using the first initial of the first name and the last name (no spaces).
 - ii. Create a password – between 7 and 20 characters.
 - iii. Verify password
5. Click Save
6. To return to the list of RT accounts – Click **Log off** in the upper right-hand corner
7. Repeat steps 4 & 5 for each RT you wish the person to have access to

How to Delete Staff Members

1. **Sign into PSN** – RT account you wish to DELETE the person from
2. Click the **ACCOUNT MANAGEMENT** tab
3. Select **Add and Maintain User Information** in the drop-down menu
4. Mark the **check box** next to the person's name and selection **OPTIONS** (far-right hand side)
5. Select the appropriate **Radio Button**
 - a. Deactivate User (the person temporarily should not have access to PSN – i.e. leave of absence)
 - b. Delete User (leaving employment)
6. Click Save

Troubleshooting

- **Change USER ID**
 - Once set, the User ID can't be changed. If you need to change it, you must delete the current user and set up a new user with the ID you want.
- **Forgot their password** (any administrator can assist in resetting a password)
 - In **Add and Maintain User Information**, **check the box** by the user's name and click Options button on the far-right hand side
 - Select the Radio button **Update user info**
 - Under Login Information
 - Provide temporary password
 - Verify temporary password
 - Click Save
 - Provide user with their temporary password
 - The user can then go in and change the password
 - **NOTE: A person cannot reuse the last 3 passwords**
- **There are users in the list that I didn't create**
 - If there is a PSN Manager or your business name, those are users set up by PSN.
 - Please do not remove these, especially the one with your business name that has a User ID that starts with ftp (this user helps automate data sharing with your software.)

If you have additional questions, please reach out to our team for assistance!