Atlantic Capital

Atlantic Capital Exchange
Quick Reference Guide

Managing User Access

If you are an Administrative User of ACE, you have the ability to manage user access within the Administration module.

1. **CREATE USERS**

   a. In Administration, click Actions and select Add User

   b. The Create User form will appear. Complete this information and click Save

   c. Users can also be cloned to reduce steps to create a new user. To clone a user, in Administration, click Actions on the respective user and select Clone User

2. **MANAGE SERVICE PERMISSIONS**

   a. In Administration, click on Actions for the respective user and select Services

   b. Permit services by clicking the checkbox next to all the services this user will need

   c. Un-permit services by unchecking the checkbox next to that service

3. MANAGE ACCOUNTS FOR PERMITTED SERVICES

    a. In Administration, click on the user and the permitted services will appear with the option to remove services ✖ , edit service preferences ✏ , or edit accounts for the service 💼 .

    b. Click on the 💼 to permit or un-permit accounts for a given service.
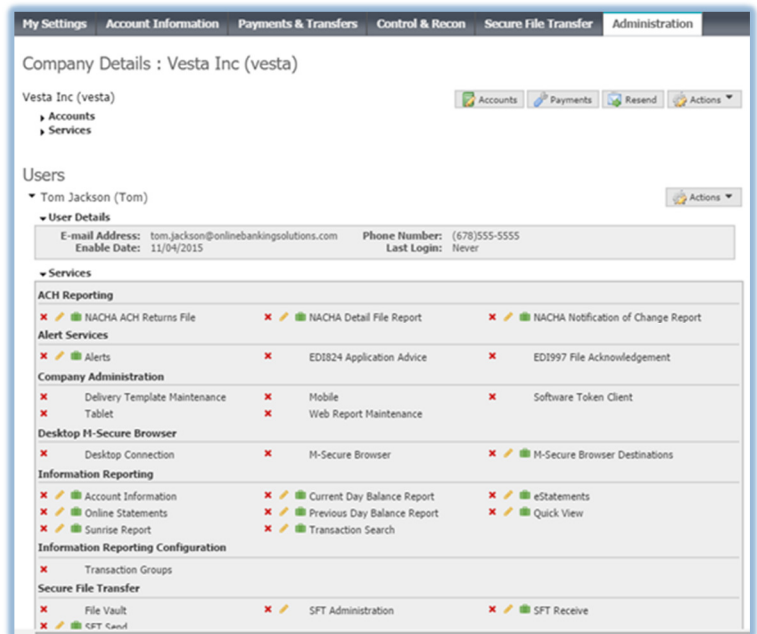
4. MANAGE PAYMENT SERVICE PERMISSIONS

    a. In Administration, click on Actions for the respective user and select Payments

    b. Permit or un-permit payment services by clicking or unclicking the checkbox next to the respective payment services on the left

    c. For each permitted service, click on the service to manage settings for that payment service

    d. Click to save once all settings for each respective payment service have been set

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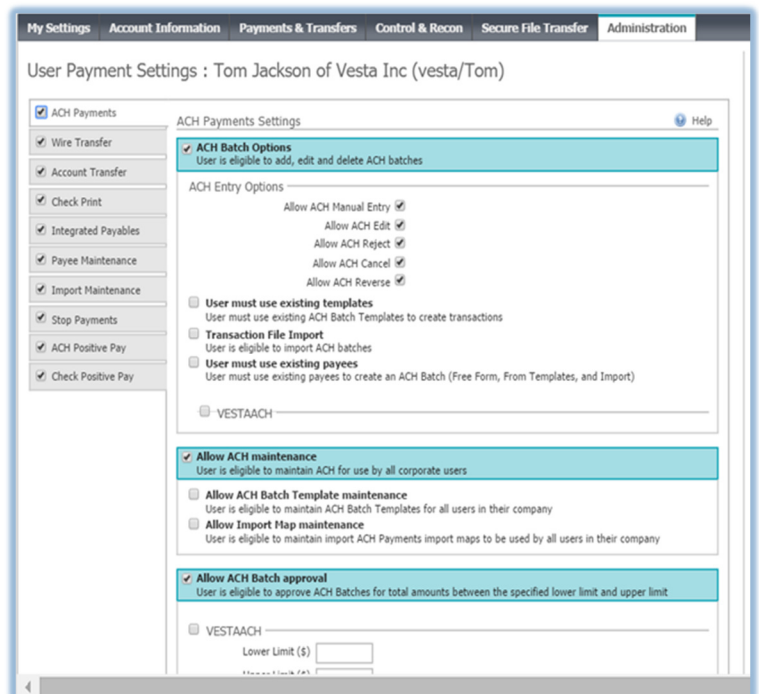
5. **MANAGE USER SUBSCRIPTIONS**

   a. In Administration, click on Actions for the respective user and select Subscriptions
   b. Modify any subscriptions by clicking on the subscription. ✅ Indicates subscriptions that have default options which can be modified.
   c. Click Save once the necessary modifications have been made.
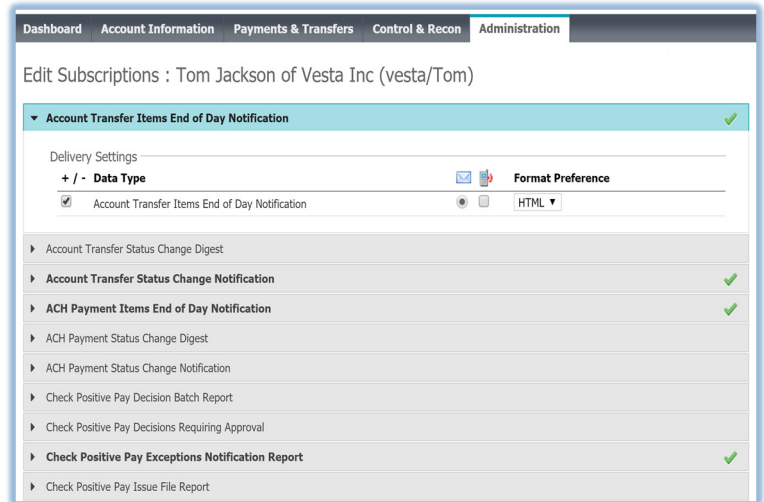
OTHER FUNCTIONS

1. **DELETE USERS**

   a. In Administration, click on Actions for the respective user and select Delete

   Note: Delete User should be selected when system access for that user needs to be permanently disabled, e.g. when an employee leaves the company

2. **DEACTIVATE USERS**

   a. In Administration, click on Actions for the respective user and select Deactivate User.

   Note: Deactivate User should be selected, when access needs to be temporarily disabled, e.g. when an employee goes on leave

3. **RESET USER PASSWORD**

   a. In Administration, click on Actions for the respective user and select Password
   b. Enter a new password and reenter to confirm the password
   c. Click Save