INVOICE FINANCE ONLINE

HOW TO MANAGE YOUR USERS

Video transcript

Welcome to Invoice Finance Online, helping you grow your business by unlocking the Working Capital tied up in your invoices.

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With Invoice Finance Online, you’re in control of who can use the system and what they can do. This demonstration shows you how.

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Firstly, you need to be set up as Primary Admin User to manage users.

Let’s start by creating a new user. Click on the Administration tab.

And select Create New User.

Now type in a sign-on name. This should be your agreement number followed by the new user’s initials.

Next, enter the person’s name and initials, as well as their email address so we can send out a password reset link if ever needed.

Then decide how much they can request in funds and assign a temporary password.

For Contact Type, confirm the amount the user will be able to request as a payment.

And tick the box to authorise the user to view all your agreements.

Finally, choose the permissions that control what the user can see and do. Tick the check box at the top to allow the user to do everything, or expand the list and deselect individual permissions.

To finish, save the user account.

Your new user is all set up and ready to go.

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If ever you need to make changes, select the user and click Edit User.

If a user is locked out because they entered the wrong password three times in a row, the ‘account is active’ box becomes unticked. To reactivate them, tick the box, save the user’s account and you’re all set.

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And as you begin to use Invoice Finance Online to manage your facility we’ll be there every step of the way.