Add and Remove Staff Access

You can control which of your staff has access to the PSN Account Management Center (AMC) and what level of access they have. For security reasons, it is <u>very important</u> to delete staff that you no longer want to have access (they have left your employment or changed positions, for examples).

1) Click on the **ACCOUNT MANAGEMENT** tab and select “Add and Maintain User information”
2) To add a user, select “Add New”
    a) Here you will enter in the users first name, last name, role, email address, user ID and a password for them
        i) Types of Roles
            (1) Administrator: Can do everything a Reader and Processor can do, plus: Sets up users and gives permission levels; cancel/stop payments; and issue refunds.
            (2) Processor: Can view everything and can also process payments, schedule Auto-Pays, upload/download data (including eBills, attachments) and submit Auto-Call campaigns. If any account is not software integrated with PSN, this person can also add buildings or services. (For example, add another property or a parking fee option for the payers to choose.)
            (3) Reader: A “look but don’t touch” role. This person can view everything, but the only thing they can change is their password.
    b) To set a User ID, we suggest using the first initial of the first name and the last name (no spaces).
    c) The password must be at least 7 characters.
    d) Select which reports you want the user to receive via email. Tips:
        i) If you receive a Detailed Payment or Deposit report, you don’t need the Summary report.
        ii) If you select Instant, you will receive an email for each payment transaction. If you get lots of payments, it is better to get a daily report, at a minimum.

To Give Users Access to Multiple Accounts (only applies if you have more than one PSN account)

1. If you want to give users listed in one account access to another account you have with PSN, log into the primary account (the account they will most often use, e.g., rent payments or utility payments)
2. Select ACCOUNT MANAGEMENT tab
3. Select “Add and Maintain Multiple Account Access”
4. Enter the “RT” account number of the other account you want to provide access to (e.g., application fees or tax payments)
5. Then enter the User ID and password for the users you want to have access across the two accounts

TROUBLESHOOTING

- ✓ “I want to change the User ID but it won’t let me.” 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.
- ✓ “My staff person has forgotten his password.” In “Add and Maintain User Information,” check the box by the user’s name and then click on the “Reset and Email Password.” The PSN system automatically resets the password to a random set of characters and then emails the new password to the user. The user can then go in and change the password. Or you can go into the user’s profile and change the password.
- ✓ “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.)

Still need assistance…

If you require additional help, please submit a TICKET by logging into the PSN Account Management Center; in QUICK LINKS, select “Submit/Monitor Tickets.” Your question will be addressed within one business day.

PSN