

Settings

Settings

- Company details
- Plans and billing
- Users and roles
- Sync and import
- Funding methods

Company details

To update company details or legal information, reach out to 800-236-7700

Company information

Business name
TEST-RETAIL3

Business address
983 PACIFIC AVEN APT D, HOFFMAN ESTATES, IL 60169

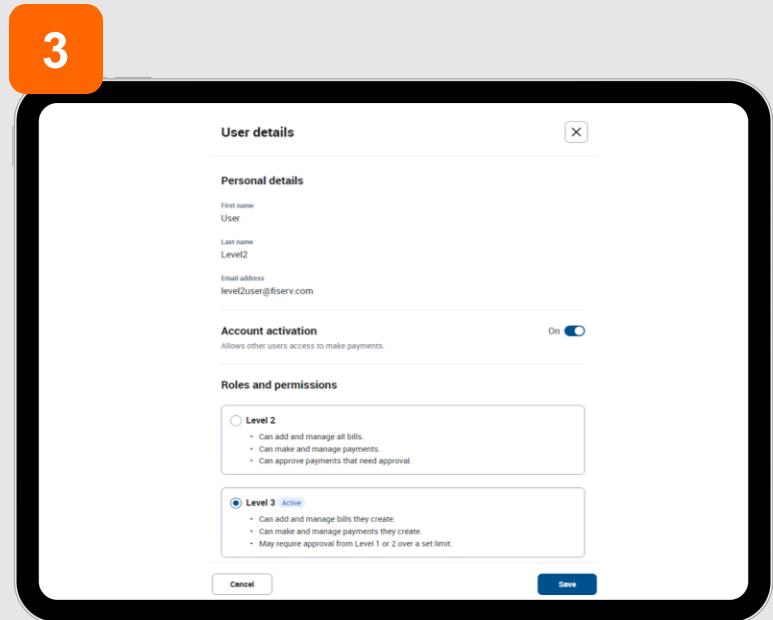
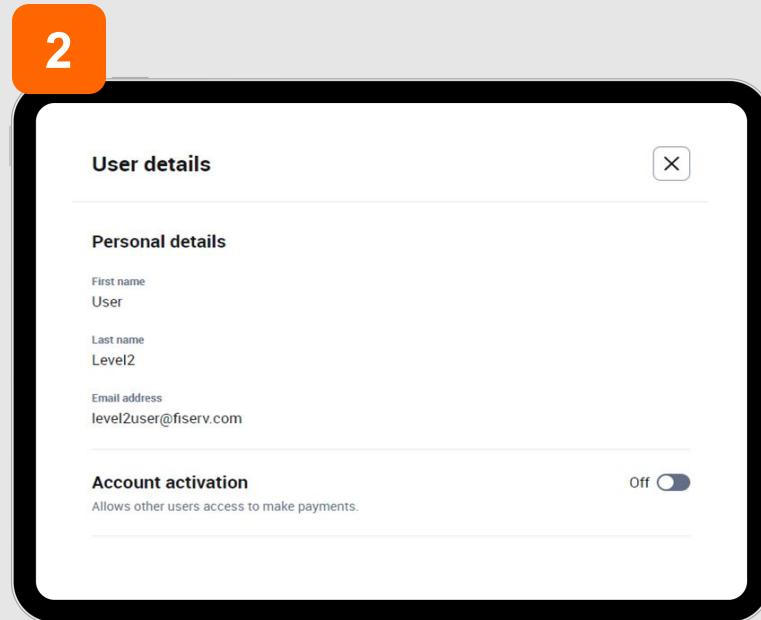
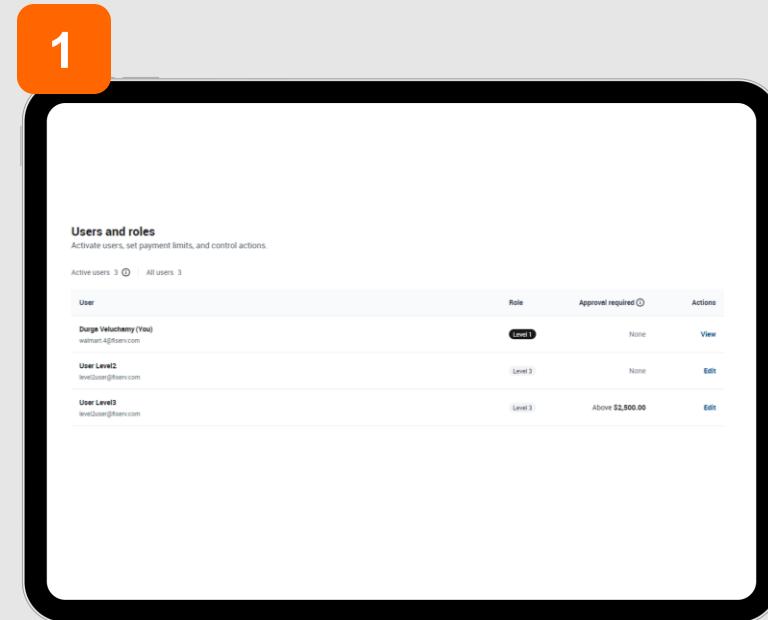
Suite #
APT D

Contact first name
Durga

Contact last name
Veluchamy

Manage and Activate Users

Through Settings Tab



From Settings, navigate to Users and roles. The amount of user seats available depend on the package chosen. Please note, the Financial Institution sets up a level one user upon enrollment.

Click into which user you would like to activate. Next to Account activation, toggle the button to on.

Once toggled to on, choose permission access of Level 2 or Level 3 under Roles and permissions. Then you may choose to allow full Funding method access and/or choose a Payment approval limit. Click Save.