

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

1

Users and roles
Activate users, set payment limits, and control actions.

Active users 3 | All users 3

User	Role	Approval required	Actions
Durga Veluchamy (You) walnut@fiserv.com	Level 1	None	View
User Level2 level2user@fiserv.com	Level 3	None	Edit
User Level3 level3user@fiserv.com	Level 3	Above \$2,500.00	Edit

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.

2

User details

Personal details

First name
User

Last name
Level2

Email address
level2user@fiserv.com

Account activation
Allows other users access to make payments. Off

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

3

User details

Personal details

First name
User

Last name
Level2

Email address
level2user@fiserv.com

Account activation
Allows other users access to make payments. On

Roles and permissions

☐ Level 2

- Can add and manage all bills.
- Can make and manage payments.
- Can approve payments that need approval.

☒ Level 3 **Active**

- Can add and manage bills they create.
- Can make and manage payments they create.
- May require approval from Level 1 or 2 over a set limit.

[Cancel](#) [Save](#)

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.