



Assign or Modify User Roles

1. Click **Administration > Company Administration > Manage users**.
2. Click the link in the **User ID** column that is associated with the user.
3. Click the **Edit Roles** link.
4. Select one or more of the following **User Roles**:
 - Allow this user to setup templates
 - Allow this user to approve transactions
 - Grant this user administration privileges
5. Click **Save changes**.

If multiple approvals are required for administration, further changes cannot be made until all approvals have been received or the request is canceled.

Assign or Modify Account Entitlements

1. Click **Administration > Company Administration > Manage users**.
2. Click the link in the **User ID** column that is associated with the user.
3. Click the **Edit Services & Accounts** link.
4. Do one of the following:
 - Click the **Add** link to entitle a service. If the service requires accounts to be entitled, the row expands in the table to reveal the accounts that can be entitled for that service. Click **Save changes**.
 - Click the **Remove** link to disable a particular service and remove the associated account entitlements.
 - Click the **Change** link can to modify the accounts entitled to the service. Clicking the **Clear all** link opens a dialog where the Administrator can remove all service and account entitlements for the user profile.
5. Click **Save changes**.



Assign or Modify Services

Some services require account level entitlements before they can be used.

1. Click **Administration > Company Administration > Manage users**.
2. Click the link in the **User ID** column that is associated with the user.
3. Click the **Edit Services & Accounts** link.
4. Do one of the following:
 - Click the **Add** link to entitle a service. If the service requires accounts to be entitled, the row expands in the table to reveal the accounts that can be entitled for that service. Click **Save changes**.
 - Click the **Remove** link to disable a particular service and remove the associated account entitlements.
 - Click the **Change** link to modify the accounts entitled to the service. Clicking the **Clear all** link opens a dialog where the Administrator can remove all service and account entitlements for the user profile.
5. Click **Save changes**.

If multiple approvals are required for administration, further changes cannot be made until all approvals have been received or the request is canceled.