



13 Creating business organisation users

Business organisation administrators are people who can assign different users of Budget Manager different permissions, according to their role.

Business organisation users can be added to Budget Manager as part of the 'create a business organisation' process, or once the business organisation process is complete.

To create a business organisation user once a business organisation has been created:

- Go to the Administration function.
- Expand the Account Set-up folder.
- Click on Business Organisation.
- Click on the Edit icon of the organisation to which the User is to be added.
- Click on the Users tab.
- Click on the Add button.

You will then be taken through the following process by the Create a Business Organisation User Wizard.

Wizard Step 1 - User Details

This step allows you to input the user's details, such as their name, telephone number and password. Every user must have a unique email address, as they will use this to log on to Budget Manager.

All fields marked with an asterisk (*) are mandatory.

When you have finished, click the Next button.

Wizard Step 2 - Roles

This step allows you to assign the user a role within Budget Manager. If necessary, they can have more than one role. Use the tick boxes to select the role(s) required.

When you have finished, click the Next button.

Wizard Step 3 - Settings

This step allows you to define the role of the user, according to whether or not they are an individual, staff member or budget manager for another individual for example. Use the tick boxes to select the role(s) required.

When you have finished, click the Next button.

Wizard Step 4 - Notifications

This step allows you to select 'event' email notifications; so that the user is emailed each time a selected event occurs. Use the tick boxes to select the notification(s) required.

When you have finished, click the Next button.

The user will now be listed in the Account set-up/ Business Organisation sub folder/ Users tab, where further details can be updated and viewed.