

Seller Administrators are responsible for adding a new Seller or Seller Administrator and maintaining user accounts for their organization. This guide presents the steps for adding users and updating their information within your organization.

Log in to PHLContracts

Log in to the PHLContracts system using your login ID and password.

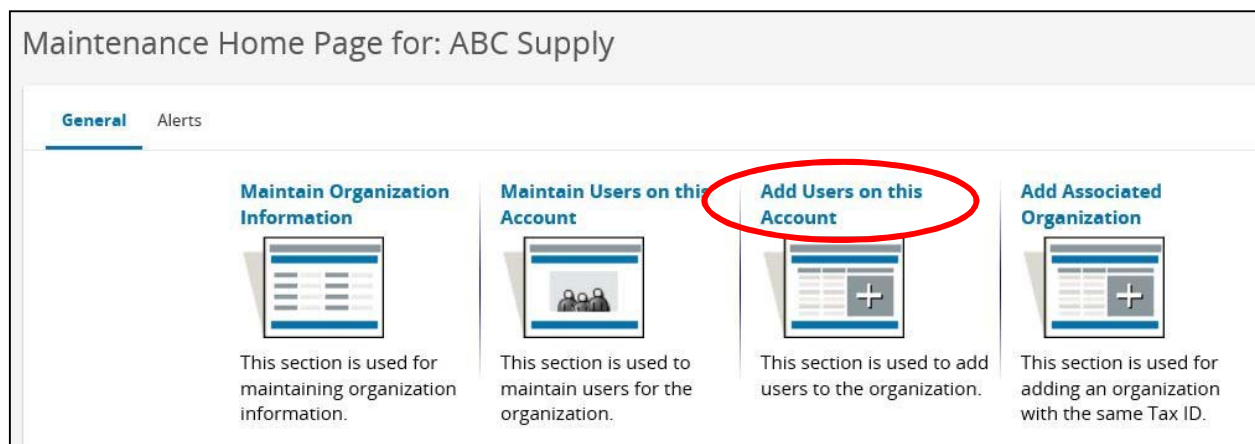
When you have logged in, ensure that if you have both the Seller and Seller Administrator roles, you have selected the Seller Administrator role. This is the role that allows you to add and maintain users.

- Click on the user icon  on the top right of the screen
- If Seller appears, click on the down triangle, then select Seller Administrator
- The screen will refresh with the Seller Administrator role

Select Add Users on This Account

An example using ABC Supply is shown.

From this menu, select the **Add Users on this Account** menu option.



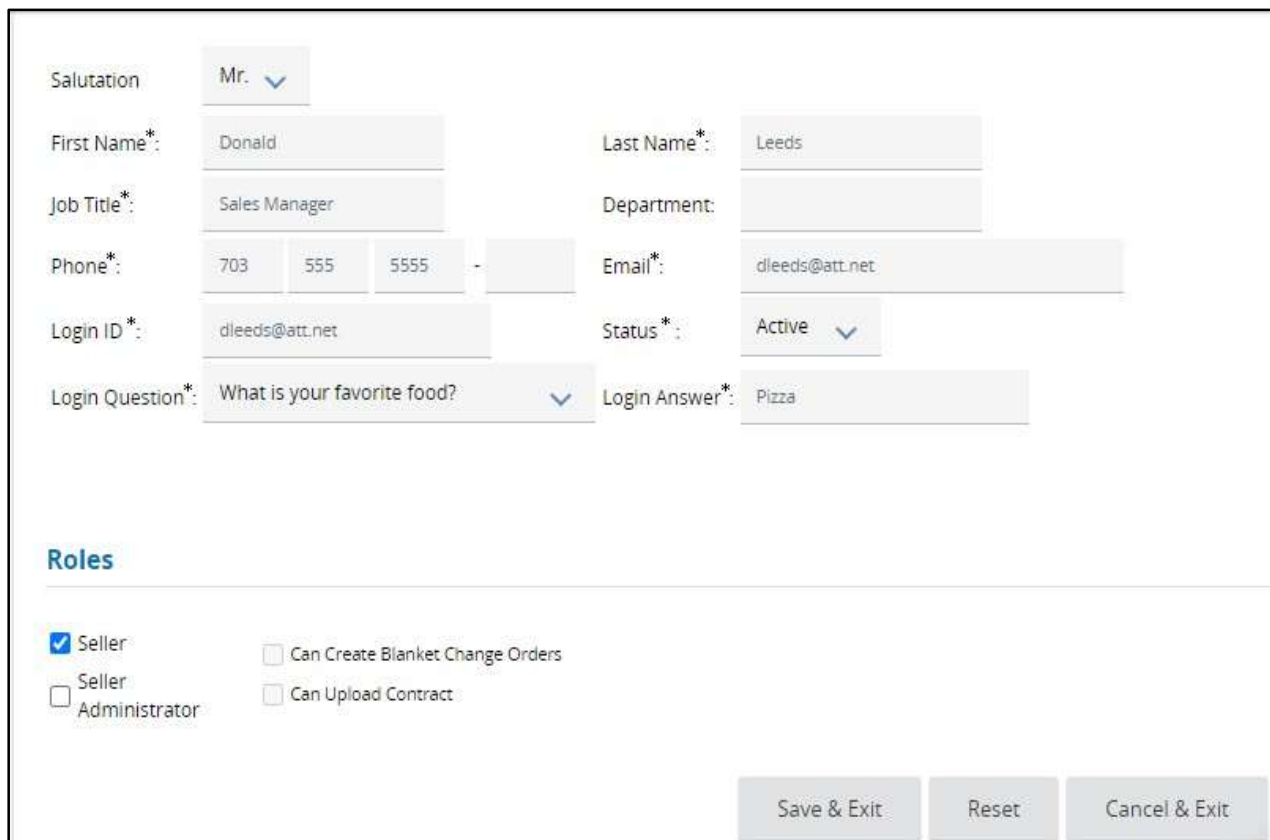
Enter and Save User Information

A page containing general information fields for a new user is displayed. The required fields are:

- First Name*
- Last Name*
- Job Title*
- Phone*
- Email Address*
- Login ID*
- Login Question* (select from the dropdown list)
- Login Answer*
- Role(s)* (in this example, the new user is being assigned the Seller role)

Note: Fields highlighted with an asterisk are required

Login IDs must be from 6 to 100 characters long and are not case sensitive



The screenshot shows a web form for adding a new user. The form is divided into two main sections: 'User Information' and 'Roles'. The 'User Information' section contains the following fields:

- Salutation: Mr. (dropdown)
- First Name*: Donald
- Last Name*: Leeds
- Job Title*: Sales Manager
- Department: (empty)
- Phone*: 703 555 5555
- Email*: dleeds@att.net
- Login ID*: dleeds@att.net
- Status*: Active (dropdown)
- Login Question*: What is your favorite food? (dropdown)
- Login Answer*: Pizza

The 'Roles' section has a heading 'Roles' and contains the following options:

- ☒ Seller
- ☐ Seller Administrator
- ☐ Can Create Blanket Change Orders
- ☐ Can Upload Contract

At the bottom right of the form are three buttons: 'Save & Exit', 'Reset', and 'Cancel & Exit'.

Once you have entered and reviewed the user information, click **Save & Exit** to complete the transaction.

Advise User of Their Login Information

The user will receive an email with the Login ID and temporary password. The user will be prompted to select a new password upon login.

Passwords must conform to the following format and are case-sensitive:

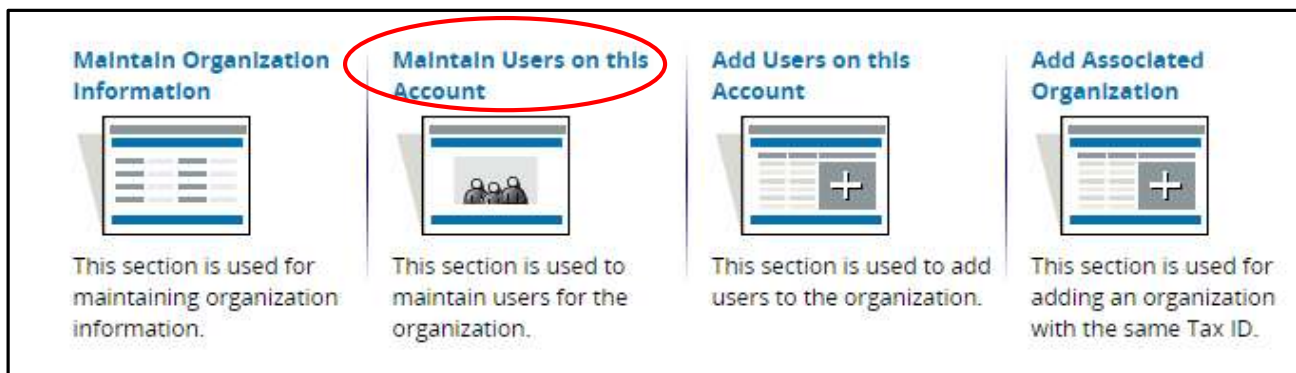
- Must be between 7 and 15 characters
- Must include both alpha and numeric characters
- Must include at least one special character (e.g., #, @, %, \$, !)

Additional requirements for passwords:

- Passwords must be changed every 90 days
- A password cannot be reused until five other passwords have been used
- After four unsuccessful attempts to log in, the account will be locked

Select Maintain Users on this Account

From this menu, select the **Maintain Users on this Account** menu option.



You will see a list of your organization's users and their roles within the application.



Click on the user's **Login ID** to access the edit page that allows you to update the user information. This page can reset passwords and change roles or job titles.



Suspend User Accounts

As an administrator, you can change the status of a user account from “Active” to another value (i.e., “Inactive”) to kick the user out of the system and prevent them from logging back into the system so that you can take preventative action if/when fraudulent activity is suspected.

- When the user attempts to log back into the system, they cannot access the system using previous credentials or through the reset password logic if a user account has not been reset to active.
- When users attempt to log back into the system, they cannot utilize the forgot password functionality if their account has not been reset to active.
- When a user attempts to log back into the system, the system must display an error that their account has been suspended if the user account has not been reset to active.
- When the admin changes the user account status back to active, the user can access the system using their previous credentials, but will be forced to change their password.

Enter and Save User Information

A page containing general information fields for a new user is displayed. The required fields are:

- First Name*
- Last Name*
- Job Title*
- Phone*
- Email Address*
- Login ID*
- Login Question* (select from the dropdown list)
- Login Answer*
- Role(s)* (in this example, the new user is being assigned the Seller role)

Note: Fields highlighted with an asterisk are required

Login IDs must be from 6 to 100 characters long and are not case sensitive

Salutation	Mr. 		
First Name*	Donald		Last Name*: Leeds
Job Title*	Sales Manager		Department:
Phone*	703	555	5555 - 
Email*	dleeds@att.net		
Login ID*	dleeds@att.net		Status*: Active 
Login Question*	What is your favorite food? 		Login Answer*: Pizza

Roles

☒ Seller	☐ Can Create Blanket Change Orders
☐ Seller Administrator	☐ Can Upload Contract

Save & Exit

Reset

Cancel & Exit

Once you have entered and reviewed the user information, click **Save & Exit** to complete the transaction.