

## ADDING NEW SYSTEM USERS

The administrator of the company can add new system users. It is recommended that at least two users be assigned the Administrator role in the event that one person is not able to access the system.

From the "Admin" tab select "User List" from the drop down menu.

| Oregon.gov  |                    |                 |                |         |              |       |  |  |  |  |
|-------------|--------------------|-----------------|----------------|---------|--------------|-------|--|--|--|--|
| Home        | Tax Filing         | eFiling         | Maintenance    | Account | Admin        |       |  |  |  |  |
| TESTCO FU   | ELS; 931234789     |                 | •              |         | Change Pas   | sword |  |  |  |  |
| I System Dr | afault Dachboard = |                 | Message Center |         |              |       |  |  |  |  |
| System De   | elault Dashboard 🔻 | Q 100IS ▼       | - Add Widgets  |         | System Act   | ivity |  |  |  |  |
| Widaota b   | aus been hidden du |                 | User List      |         |              |       |  |  |  |  |
| widgets n   | ave been nidden du | e to access lev | er resulcuons. |         | User Profile | 2     |  |  |  |  |
|             |                    |                 |                |         |              |       |  |  |  |  |
|             |                    |                 |                |         |              |       |  |  |  |  |
|             |                    |                 |                |         |              |       |  |  |  |  |

## Figure 1. Select User List

This will bring up the screen which lists existing users for your company, and their status. Click on "Add New User" just above the existing user list to create a new system user.

| Home          | Vecome tescones annu i ree i sign du<br>Vecome tescones annu i ree i sign du<br>Vecome tescones annu i ree i sign du |                                 |  |         |            |              |                  |                      |                            |
|---------------|--|---------------------------------|--|---------|------------|--------------|------------------|----------------------|----------------------------|
|               |  |                                 |  |         |            | Users        |                  |                      |                            |
| Add New       | User   |                                 |  |         |            |              |                  |                      | ▼ Filter   2 Refres        |
| User Name     | Ema  | đ                               |  | Enabled | Locked Out | Backend User | ZMS Role         | Last Login Date      | Last Password Changed Date |
| testcofuels_a | idmin Lind   | s K.McClelland@odot.state.or.us |  | 14      |            |              | OR_COMPANY_ADMIN | 2/2/2015 11:23:09 AM | 2/2/2015 10:55:37 AM       |
| Add New       | User   |                                 |  |         |            |              |                  |                      | ▼ Filter   2 Refres        |
| 14 4          | H 4 1 > H Page 1 of 1 Go Page Size 1 Change Items 1 to 1 of 1.   |                                 |  |         |            |              |                  |                      |                            |
| Excel         | Excel • Export   |                                 |  |         |            |              |                  |                      |                            |
|               |  |                                 |  |         |            |              |                  |                      |                            |
|               |  |                                 |  |         |            |              |                  |                      |                            |
|               |  |                                 |  |         |            |              |                  |                      |                            |
|               |  |                                 |  |         |            |              |                  |                      |                            |

Figure 2. Add new company user



The "Create User" screen is displayed.

| Create User ×     |                  |  |  |  |  |  |  |  |
|-------------------|------------------|--|--|--|--|--|--|--|
| User Com          | Imunication      |  |  |  |  |  |  |  |
| User Information  |                  |  |  |  |  |  |  |  |
| User Id 🔺         |                  |  |  |  |  |  |  |  |
| First Name 🔺      |                  |  |  |  |  |  |  |  |
| Last Name *       |                  |  |  |  |  |  |  |  |
| Title *           |                  |  |  |  |  |  |  |  |
| Telephone *       | ()               |  |  |  |  |  |  |  |
| Alternate ID      |                  |  |  |  |  |  |  |  |
| Email *           |                  |  |  |  |  |  |  |  |
| All Jurisdictions | Set Per Company  |  |  |  |  |  |  |  |
| Company *         | TESTDAVID01      |  |  |  |  |  |  |  |
| Role              | OR_COMPANY_ADMIN |  |  |  |  |  |  |  |
|                   |                  |  |  |  |  |  |  |  |
|                   |                  |  |  |  |  |  |  |  |
|                   |                  |  |  |  |  |  |  |  |
|                   |                  |  |  |  |  |  |  |  |
|                   |                  |  |  |  |  |  |  |  |
|                   |                  |  |  |  |  |  |  |  |
|                   |                  |  |  |  |  |  |  |  |
|                   |                  |  |  |  |  |  |  |  |
|                   | Next             |  |  |  |  |  |  |  |
|                   | Next             |  |  |  |  |  |  |  |
|                   | © 2017 Avalara   |  |  |  |  |  |  |  |

Figure 3. User information screen

The User Name can be anything the user wants, preferably something easy to remember. Check the spelling of the email address, as this will be used to send the new user their temporary password.

The "All Jurisdictions" field can be changed to allow view only or edit access or leave as defaulted.

The "Company" field will default to your company name.

The "Role" field is chosen by the administrator adding the new user. The choices are ADMIN, CERTIFICATION, and TAXPAYER (see "Roles" below for additional information).

Click the "Next" button at the bottom of the screen.



| OREGON.C  | GOV   | Create User ×     |  |  |  |  |  |
|---|---|-------------------|--|--|--|--|--|
| Home Tax Filing   | eFiling Maintenance A                             | User Information  |  |  |  |  |  |
| nome rax rilling  | er ning Phalitenance A                            | User Name         | TESTCO-CERT                              |  |  |  |  |
|   |   | First Name        | CERT                                     |  |  |  |  |
|   |   | Last Name         | TESTCO                                   |  |  |  |  |
|   |   | Title             |  |  |  |  |  |
| Add New User  |   | Telephone         | (503) 555.1212                           |  |  |  |  |
| User Name   | Email   | Alternate ID      |  |  |  |  |  |
| testcofuels_admin   | Linda.K.McClelland@odot.state.or.us               | Email             | K.McCLELLAND@ODOT.STATE.OR.US            |  |  |  |  |
| Add New User  |   | All Jurisdictions | Set Per Company                          |  |  |  |  |
|   |   | Company           | TESTCO FUELS                             |  |  |  |  |
| Excel   | Export  | Role              | OR_COMPANY_CERTIFICATION •               |  |  |  |  |
|   |   |                   |  |  |  |  |  |
|   |   |                   | C  | ommunication   |  |  |  |
|   |   | The following     | message will be sent as a result of this | action. Select an option below to confirm communication status |  |  |  |
|   |   | Message           | approved for sending                     |  |  |  |  |
|   |   | 7                 |  |  |  |  |  |
| Clic  | k here to generate                                | Message           | The Avalara Excise Platform ac           | dministrator has created your secure user account.             |  |  |  |
| ema   | ail to the new user                               |                   | Discourse the following second           |  |  |  |  |
|   |   |                   | Username: [user_name]                    | ame and temporary password:[user_name]                         |  |  |  |
|   | Password: [user_password]                         |                   |  |  |  |  |  |
|   |   |                   | URL: [site_setting_email_url]            |  |  |  |  |
| Upon logging into Avalara Excise Platform please update your profile, change your password, and |   |                   |  |  |  |  |  |
|   | set your password assistance question and answer. |                   |  |  |  |  |  |
|   |   |                   |  |  |  |  |  |

Figure 4. Email approval message

Click on the little dot next to "Message approved for sending" to have the system send the new user their user name and password information. Then scroll down to the end of the message and click the "Create New User" box at the bottom of the pop-up window.

The pop-up window will change to "User has been assigned to company [company name]" when the process is completed. When the window is closed, the system will show that the user list has been updated.

| Create User   | × |  |  |  |  |
|---|---|--|--|--|--|
| User has been assigned to company: Demo Inc   |   |  |  |  |  |
| Success   |   |  |  |  |  |
| The new user was successfully created. The login information has been sent to the user. |   |  |  |  |  |
|   |   |  |  |  |  |
|   |   |  |  |  |  |
| Figure 5. User successfully created message   |   |  |  |  |  |

## USER ROLES:

The Administrator role has the most access to the system. Only administrators can change company information, set up the payment process, apply for new licenses, and add new users.

The Taxpayer role can view most of this data (except applications and system users).



The Certification role can view registrations and edit company information.

All of the roles can enter or upload information for tax reports, make payments, and check the status of filed returns.

In addition to the edit capabilities described above, all three roles can view registration history, account balances, and report filing history. Each role has different menu options (within the five basic categories). If a role does not have that menu option on their drop down, they do not have access to that function.

The lists below show which functions the various roles can "EDIT", "view" or have no access (blank in the grid). Explanations of each function are described in separate documents.

| TOPIC   | ADMIN | CERT | TAXPAYER |
|---|-------|------|----------|
| Account Management Make Payment                 | EDIT  | EDIT | EDIT     |
| Account Registration Data File Upload           | EDIT  | EDIT | EDIT     |
| Account Registration Generate Form Settings     | EDIT  | EDIT | EDIT     |
| Account Registration Generate Manual Entry      | EDIT  | EDIT | EDIT     |
| Account Registration Status                     | EDIT  | EDIT | EDIT     |
| Account Registration Supporting Details         | EDIT  | EDIT | EDIT     |
| Data File Upload                                | EDIT  | EDIT | EDIT     |
| e-File Upload                                   | EDIT  | EDIT | EDIT     |
| e-File Viewer                                   | EDIT  | EDIT | EDIT     |
| Maintenance Business Entities                   | EDIT  | EDIT | EDIT     |
| Maintenance Locations                           | EDIT  | EDIT | EDIT     |
| Maintenance Taxpayer Contacts                   | EDIT  | EDIT | EDIT     |
| Return Add New Session                          | EDIT  | EDIT | EDIT     |
| Return Create Amendment                         | EDIT  | EDIT | EDIT     |
| Return File Tax Return                          | EDIT  | EDIT | EDIT     |
| Return Generate Filed Return Only               | EDIT  | EDIT | EDIT     |
| Return Generate Overall                         | EDIT  | EDIT | EDIT     |
| Return Gov File Tax Return Payment Required     | EDIT  | EDIT | EDIT     |
| Return Manual Entry                             | EDIT  | EDIT | EDIT     |
| Return Settings                                 | EDIT  | EDIT | EDIT     |
| Return Tax Sessions                             | EDIT  | EDIT | EDIT     |
| Schedule Transactions                           | EDIT  | EDIT | EDIT     |
| Widget Calendar                                 | EDIT  | EDIT | EDIT     |
| Widget Message Center                           | EDIT  | EDIT | EDIT     |
| Widget Tax Session Workflow                     | EDIT  | EDIT | EDIT     |
| Zytax Home                                      | EDIT  | EDIT | EDIT     |
| Maintenance Company Information                 | EDIT  | EDIT | view     |
| Maintenance Company Information Company Contact | EDIT  | EDIT | view     |
| Account Registration Submit Registration        | EDIT  | view | view     |

Figure 6. User role and function list

| TOPIC                                       | ADMIN | CERT | TAXPAYER |
|---|-------|------|----------|
| Account Management Payment Processing Setup | EDIT  |      | view     |
| Account Application Status                  | EDIT  |      |          |
| Account Registration Add New Record         | EDIT  |      |          |
| Admin User List                             | EDIT  |      |          |
| Account Management Account Activity         | view  | view | view     |
| Account Management Company Balance          | view  | view | view     |
| Account Management Payment History          | view  | view | view     |
| Account Registration Generate History Log   | view  | view | view     |
| Account Registration Details                | view  | view | view     |
| Account Registration View Certificate       | view  | view | view     |
| Account Registration View Registration Form | view  | view | view     |
| Maintenance Companies                       | view  | view | view     |
| Maintenance Company Accounts                | view  | view | view     |
| Maintenance Terminals                       | view  | view | view     |
| Return History Log                          | view  | view | view     |
| Return View Tax Return                      | view  | view | view     |
| Schedule Transactions Validation            | view  | view | view     |
| Widget Tax Session Counts Per Period        | view  | view | view     |
| Widget Tax Session Status Per Period        | view  | view | view     |
| Admin System Activity                       | view  | view |          |
| Admin Message Center                        | view  |      |          |

Figure 7. User role and function list continued