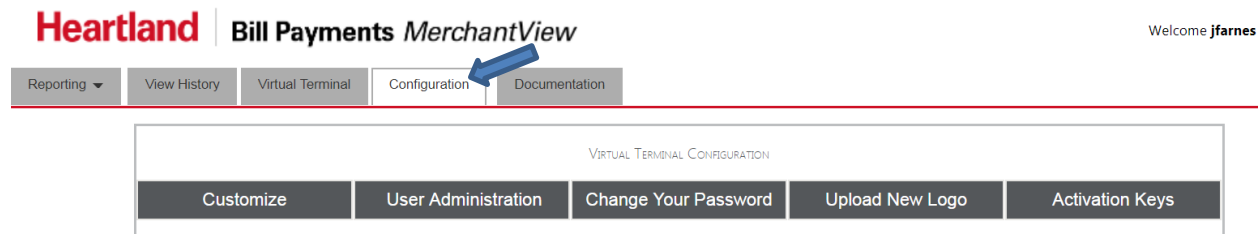Creating User Roles

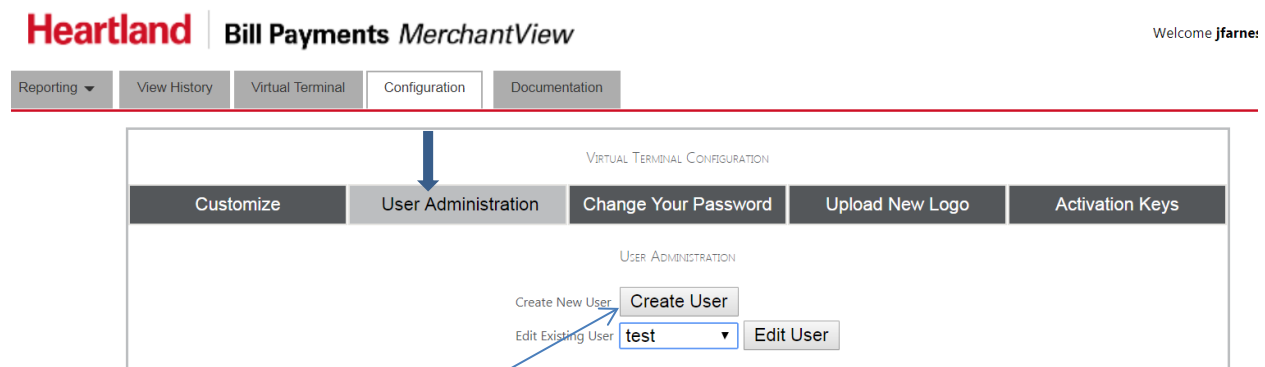# Clerks of Court assign User Roles which includes a temporary password. Refer employees to the document "Changing User Password".

From the Heartland MerchantView home page

--Select the Configuration menu

Select "User Administration"

Click on Create New User

It is recommended the following job titles have these specific roles assigned:

Clerks of Court are assigned to the Role of "*Merchant Admin*" (which can perform all functions except assigning other 'Merchant Admin" rights.) This individual assigns all users access. Merchant Admin roles are only assigned by AOC Finance.

Accountants are assigned to the Role of "*Reporting Advanced Cashier*."

Support Services Coordinators (that only reconcile trust accounts) are assigned "*Reporting*." The main difference between this individual and *Reporting Advanced Cashiers* is the inability to issue voids/refunds.

Cashiers are to be set up as "Cashier" unless they are in a small site that may need to issue a Refund/Void, then select "Reporting *Advanced Cashier*".

The following chart shows Heartland's current design of what abilities certain Roles allow:

TABLE 1: BOLLETTA USER ROLES						
Task	Cashier	Cashier Plus	Advanced Cashier	Reporting*	Reporting Advanced Cashier	Merchant Admin
Process Payments	•	•	•		•	•
View Transaction History	•	•	•	•	•	•
Void a Transaction		•	•		•	•
Refund a Transaction			•		•	•
End of Day Reporting	•	•	•	•	•	•
View All Reporting				•	•	•
Report Export Functionality				•	•	•
Add, edit, delete User Accounts						•
Add Merchant Admins						

*The Reporting Role is only applicable to MerchantView and not the desktop Cashier.

In the future, Heartland will allow us the ability to specify tasks that we want a user to perform and not be restricted as the chart above.
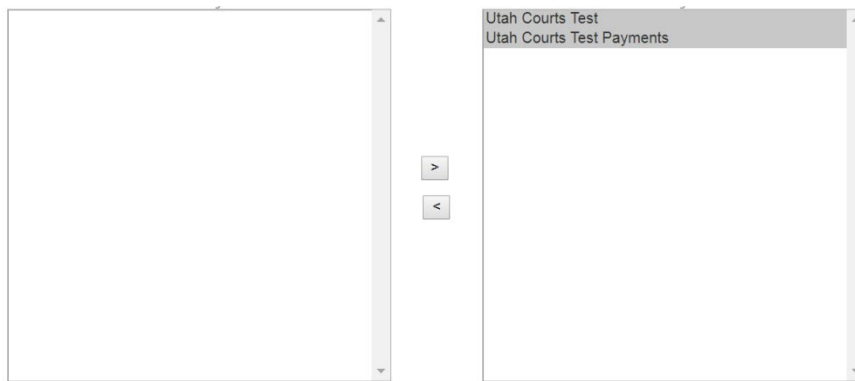
User Tasks for Role

- ☑ Process Payments
- ☑ View Transaction History
- ☑ Void a Transaction
- ☑ Refund a Transaction
- ☑ End of Day Reporting
- ☑ View All Reporting
- ☑ Report Export Functionality
- ☐ Add, edit, delete, User Accounts
- ☐ Add Merchant Admins

You will need to create a username and a generic temporary password for each user as well as a copy of the document "**Changing Heartland Password.'** To ensure that the password has at least 9 characters, contains at least one lowercase and one uppercase letter, one number, and one special character. No spaces.

At the bottom of the screen you need to assign merchants/accounts for each user. The screen shot below reflects the test accounts, but once we deploy, all District and Juvenile sites will be displayed on the left side. Click on the site and then the 'add' arrow to move to the right.

When completed select "Submit"

Watch for this message to know that you have successfully created a new user. If you don't see this message, after selecting "Submit", read any error messages in red at the bottom.
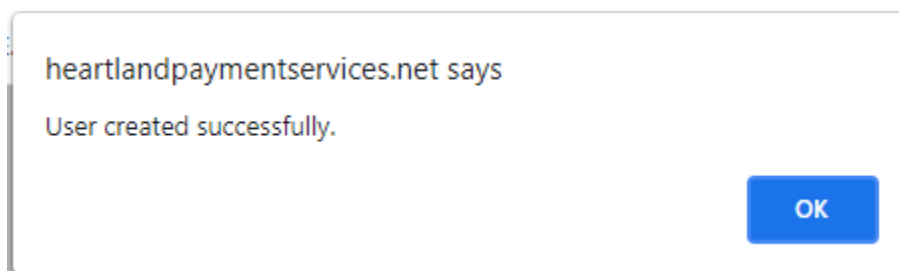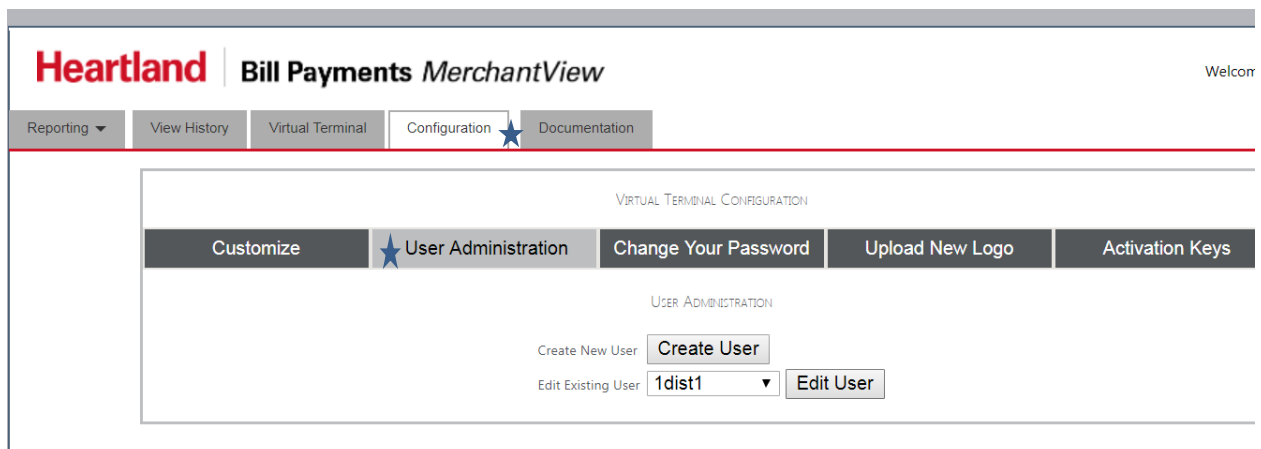

To edit a user:

From the Heartland MerchantView home page

--Select the Configuration menu

--User Administration

From the Edit Exiting user box select the name of the user, then select "Edit User."

Roles and accounts can be changed from this menu.

ADD / EDIT USER

Username	1dist1	First Name	Accountant Testing
Role	ReportingAdvancedCashier ▾	Middle Name	
Password		Last Name	1st District
Confirm Password		Email Address	aocfinancedocs@utcourts.gov

☑ User Is Active

Passwords must be at least 9 characters, contain at least one lowercase and one uppercase letter, one number, and one special character. No spaces.

User Tasks for Role

☑ Process Payments

☑ View Transaction History

☑ Void a Transaction

☑ Refund a Transaction

☑ End of Day Reporting

☑ View All Reporting

☑ Report Export Functionality

☐ Add, edit, delete, User Accounts

☐ Add Merchant Admins

Merchants Not Assigned to User

Merchants Assigned to User

Utah Courts Test
Utah Courts Test Payments

Changing Heartland Password

Once the user has been set up, the following is required for the user to change their password.

Have the user call Heartland Product Support (866) 801-4757 if they are having issues changing their password.

Changing a password is done from within the Heartland MerchantView platform. If you forget a password, utilize the feature 'Forgot Password"

From the Heartland MerchantView home page

--Select the Configuration Menu

--Change Your Password

Passwords must be at least 9 characters, at least one lowercase and one uppercase letter as well as one special character.