

Updating User Accounts – User Type & Role

1

Perform a search to locate the account.

Search Current

2

Click the **User Name** or **Last Name** link in the search results to display the User or Data Provider Summary.

Username	Last Name	Office						
	ashes							
<table border="1"> <thead> <tr> <th>User Name ↑</th> <th>Name</th> <th>Office Name</th> </tr> </thead> <tbody> <tr> <td>ash2ash</td> <td>Ashes, Ashes</td> <td>Eternal Rest Funeral Home</td> </tr> </tbody> </table>			User Name ↑	Name	Office Name	ash2ash	Ashes, Ashes	Eternal Rest Funeral Home
User Name ↑	Name	Office Name						
ash2ash	Ashes, Ashes	Eternal Rest Funeral Home						

3

Click the **Update Offices/Roles/Business Functions** link on the User or Data Provider Summary.

<p>User Type</p> <p>Funeral Home User</p> <p>Total records : 1</p>	<p>Office</p> <p>Eternal Rest Funeral Home</p> <p>Total records : 1</p>	<p>Roles</p> <p>Default Death Funeral Home User</p> <p>Total records : 1</p>	<p>Additional Business Functions</p> <p>No data found.</p>
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Update Offices/Roles/Business Functions

4

No changes are needed on the Office Affiliations screen so click **Next** to continue.

Next >>

5

If the User Type is incorrect, select the **Remove** checkbox and click **Remove**.

Note: If the User Type is correct, click **Next** and jump to **Step #8**.

Please select User type for each Office Affiliation:

User Types: Funeral Home User

Offices: Eternal Rest Funeral Home

Add **Remove**

Remove	User Type
<input checked="" type="checkbox"/>	Funeral Home User

6

The incorrect user type has been removed from the account. Select the **correct user type** and click **Add**.

Please select User type for each Office Affiliation:

User Types: **Funeral Director**

Offices: Eternal Rest Funeral Home

Add **Remove**

7

The new user type has been added.

*Verify that the **Death** checkbox is only selected for **Funeral Director** accounts!

Click **Next** to continue.

Remove	User Type	Office Affiliation
<input type="checkbox"/>	Funeral Director	Eternal Rest Funeral Home

Total records : 1

User is authorized to sign for the following events:

Death

Cancel **<< Back** **Next >>**

8

If the role assigned to user is incorrect, select the **incorrect role** and click the **Remove Arrow** to remove it.

Note: If the User Role is correct, click **Next** and jump to **Step #11**.

User Types: Funeral Director

Available Roles

Default Death Funeral Director	>	Roles Assigned to the user
	>>	
	<	
	<<	

Default Death Funeral Home User

9

Select the **correct role** and click the **Add Arrow** to add it.

User Types: Funeral Director

Available Roles

Default Death Funeral Director	>	Roles Assigned to the user
Default Death Funeral Home User	>>	
	<	
	<<	

10

The correct role now displays. Click **Next** to continue.

Next >>

User Types: Funeral Director

Available Roles

Default Death Funeral Home User	>	Roles Assigned to the user
	>>	
	<	
	<<	

Default Death Funeral Director

11

The Business functions screen displays. No action is needed. Click **Finish** to complete the process.

Finish

12

The User Summary screen displays the changes that were made.

Eternal Rest Funeral Home
Ashes 2 Ashes is authorized to sign for the following events: Death

User Type	Office	Roles	Additional Business Functions
Funeral Director	Eternal Rest Funeral Home	Default Death Funeral Director	
Total records : 1	Total records : 1	Total records : 1	No data found.

Update Offices/Roles/Business Functions

Note: There may be times when the Summary Screen temporarily displays both user types. If this occurs, no further action is required because the change has been recorded, but it may take a few hours to occur.