If the company has at least one Secondary Admin, approval is required for new users. Only the Primary Admin or a Secondary Admin can approve a user.

After adding a new user,

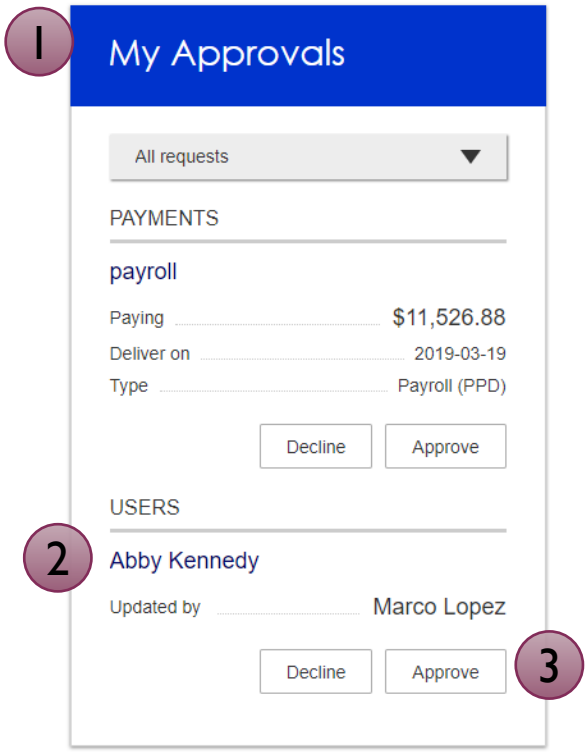
- user status is "Setup Pending".
- emails are sent to other Business Admin(s)
- the user's name shows in the Approval widget

Edits to a user also require approval. Password resets do not count as an edit.

**Steps to Approve a User:**

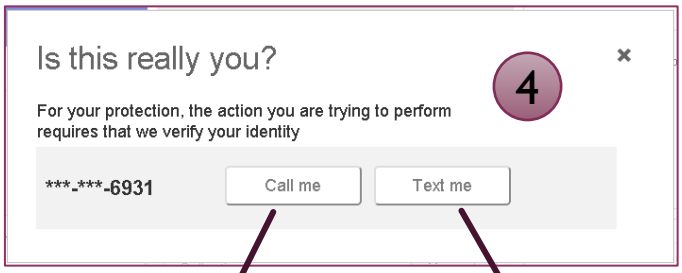
1. Go to My Approvals widget.
2. Click the user's name to review details.
3. Click Approve.

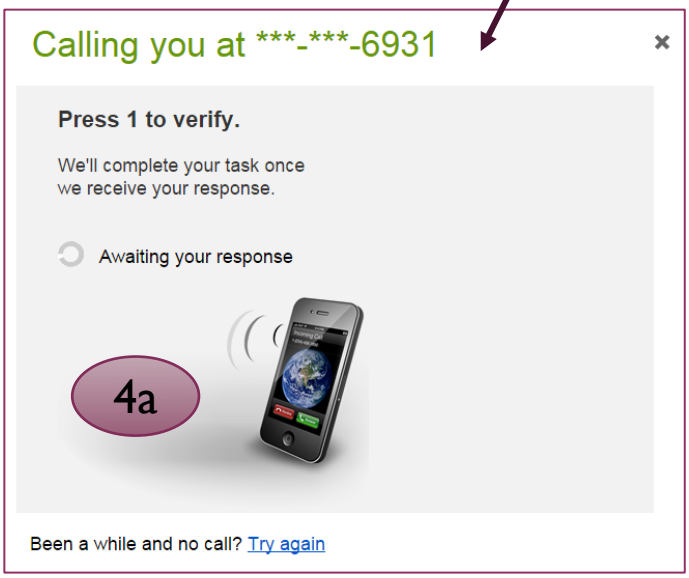
If **Decline** is selected, the user moves to Declined Payments activity and sends an email to the initiator.

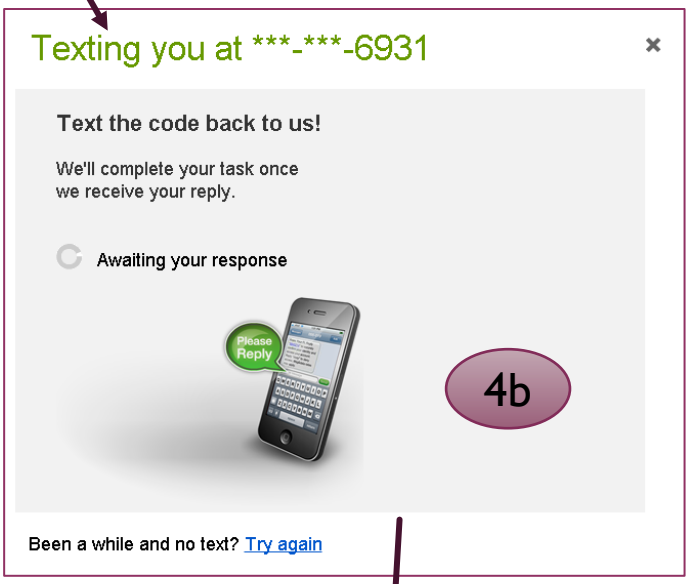



**Tip:** Users requiring approval stay on My Approvals widget indefinitely.

4. A pop-up prompts the Admin to verify identity.
   a. Call Me - answer the phone and press "1" per the automated instructions.
   b. Text Me - receive the text and reply back with the security code.
5. If successful, the system sends the user 2 emails with username and password, and the user's status changes to Active.




**Tips:**

- The Admin will need to enter the security code as part of the authentication process in order to complete approval.
- The pop-up closes after 5 minutes.
- If the Admin closes the pop-up before completing verification, approval will not go through.