Developer Services Portal

Quick Reference Guide

Business Account Registration & Managing Linked Individual Accounts

Post MFA Rollout 2024

Customer Experience Product Team

Contents

What is a Business Account?

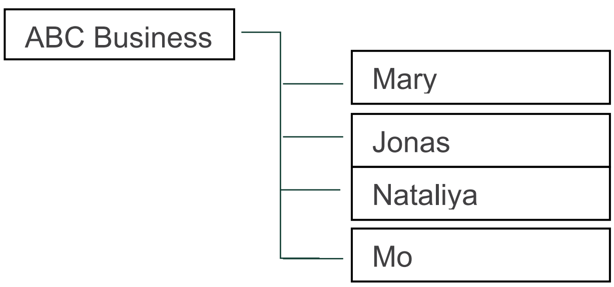
Customers have two different ways to register for the Developer Services Portal:

- as an Individual, or
- as a Business.

A Business Account acts as a “Parent” which can have multiple Individual Accounts linked as “Children”.

Individual (Child) Accounts have full visibility of <u>all</u> applications both in progress and completed by other Individual Accounts linked to the Business (Parent) Account. (*Please note that these Individual (Child) Accounts will NOT receive email notifications for other applications in progress because they are linked to a Parent Business Account; they will only receive notifications if they are listed as a contact on an application).*

In the example below, you see the Business (Parent) Account sits over the Individual employee (Child) Accounts.



Developer Services recommends you only add EMPLOYEES to this structure. If you wish to add a client, we recommend you add them AS A CONTACT on their respective application.

What is a *Developer Services Business Admin* user?

- The person who sets up and registers a Business Account is known as the "**Developer Services Business (Account) Administrator**" (DSBA).
- As they set up the Business Account, they will automatically have an Individual (Child) Account created in their name under the Business Account.
- The **DSBA** has additional permissions whereby they can create new individual accounts and link them to the business account. They can also disable linked individual accounts if a staff member leaves the business.
- If the person registered as the **DSBA is to be changed, or you would like to have more than 1 DSBA,** advise developmentenquiries@urbanutilities.com.au and nominate the person to add/take their place.

Setting up a Business Account

To set up/register a Business Account, you need to:

> ***identify the person in your business who will have control to add and remove people from the business account. They will be known as the Developer Services Business Admin (DSBA).***

To setup the Business Account, the DSBA is to:

- Navigate to the Registration screen on the Portal.

- The "First Name" and "Last Name" fields are those of the DSBA (setting up the business account will automatically identify that person as the DSBA)
- The "Business Name" will be the Business (Parent) Account name.
- Password needs to be at least 8 characters.
- Once registered, the Business (Parent) Account name is now known as the "Customer Name".
- The Individual (Child) Account of the DSBA is now known as a "Contact" of the Business Account.

- The DSBA can select “Update My Profile” from the tabs at top of the Developer Services Portal to review all contacts listed under their Business Account.

- The next time the DSBA logs in to the portal, they will be required to setup Multifactor Authentication for their account. Refer to this quick reference guide as to how to setup: [Setting up Multi-Factor Authentication (MFA) for Developer Services Portal]

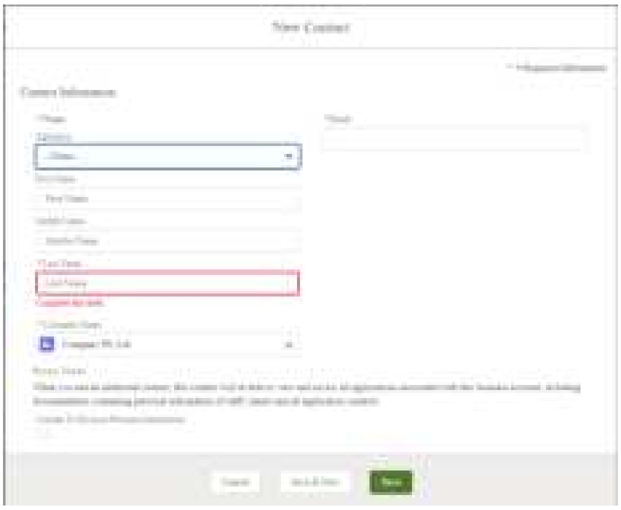
How to create new Individual Accounts and link to the Business Account

Developer Services recommends you only add EMPLOYEES to this structure. If you wish to add a client, we recommend you add them AS A CONTACT on their respective application.

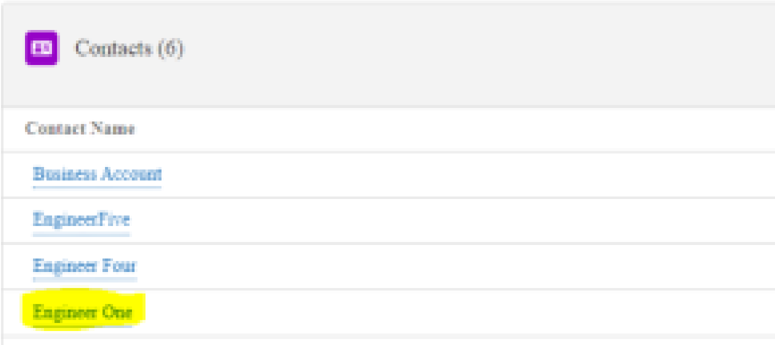
The DSBA is to:

- Log in to their account and navigate to “Update My Profile”
- Select the “New” button located on right side of Contacts Widget

- Fill in the **employee’s** First Name, Last Name, Email Address, read the Privacy Notice and check the Privacy box (by checking this box, you are giving consent that this person will be able to see EVERY application, complete and in progress, by your business). Select Save:

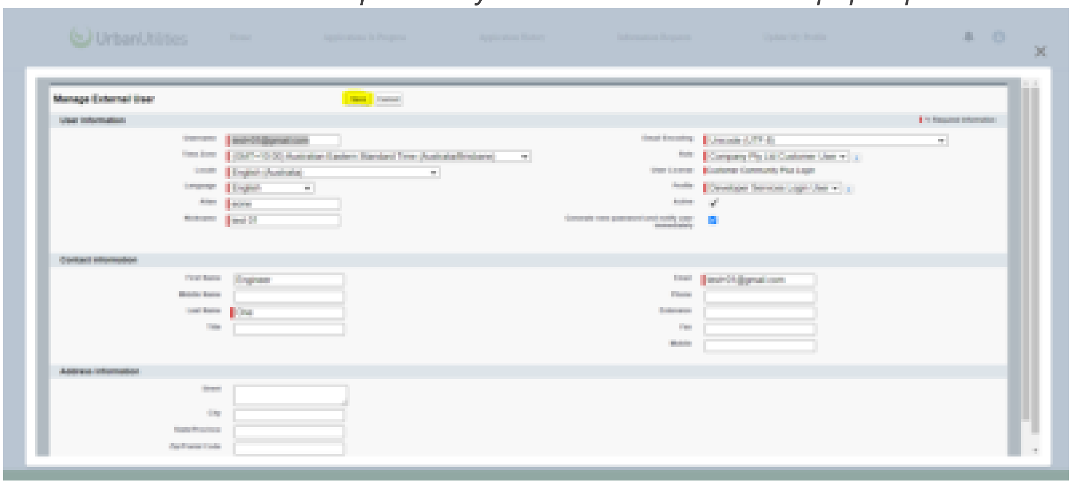


- Select that employee’s name in the contacts section, as shown below:



- Next select “Enable Customer User”

- “Save”. *You don’t need to update any fields in the window that pops up.*



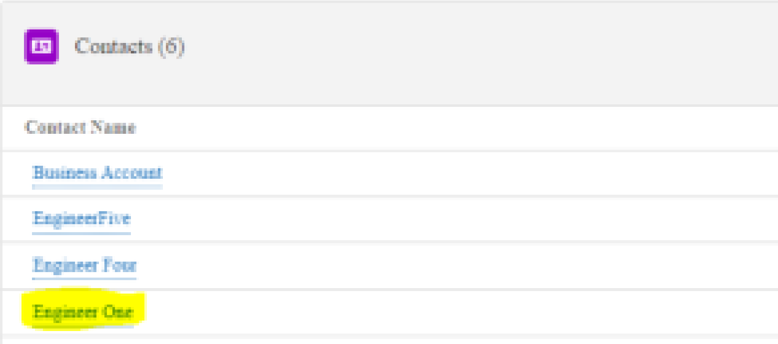
- That user will then receive a “Welcome Email” from the Developer Services Portal where they may need to setup a new Password.

- The next time this new contact associated with the Business (Parent) Account logs into the Developer Services Portal, they will be required to setup Multifactor Authentication for their account. Refer to this quick reference guide as to how to setup: [Setting up Multi-Factor Authentication (MFA) for Developer Services Portal]

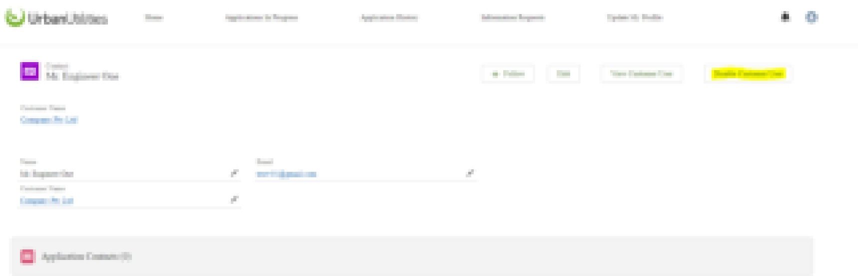
How to disable Individual Accounts linked to the Business Account.

You would use this function if an employee is leaving the business or no longer requires access to the Developer Services Portal.

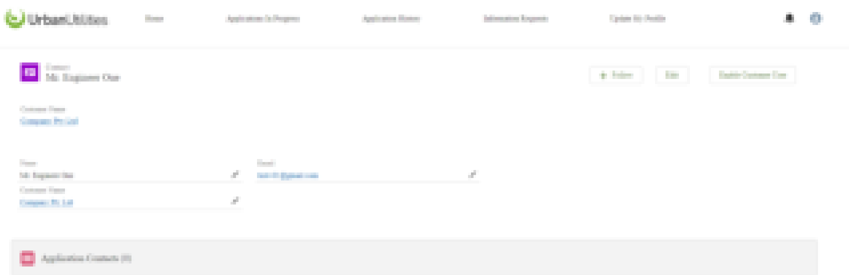
- The DSBA is to log in to their account and navigate to “Update My Profile”
- Select the employee’s name in the “Contacts” section who you want to disable (as shown):



- Select “Disable Customer User”



- Once complete, you will now see the button has changed to “enable user”



Identifying the Developer Services Business (Account) Administrator

Everyone invited to your Business Account can see who is/are the DSBA in your business through their Update my Profile tab. In the Business Account below, we can see Pat Brown is the DSBA – the Business Admin contact.