Payment Center Program Administrator

Logging On, Self-Registration, User Administration

User Guide

Bank of America
Merrill Lynch

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Introduction

The Home page displays when you first logon to the system. Unless otherwise noted, all tasks described in this guide begin from the Home page.

Access the Logon page using the URL **http://www.baml.com/paymentcenter**, supply your user ID and password, and the Home page opens. To use Payment Center you must have a user profile set up; or, if you are an Administrator or account holder, you can self-register by clicking the Not Registered link on the Logon page. This guide provides instruction for completing the following tasks:

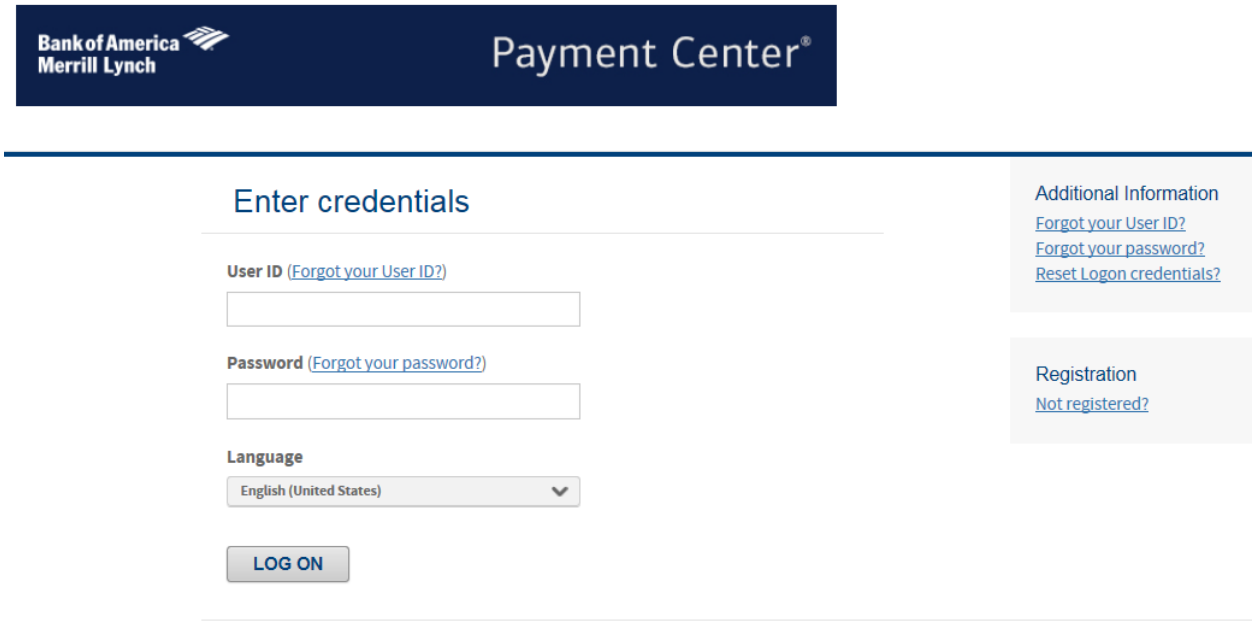
- Logging on to the card management system
- Self-registering to use the system
- Retrieving your password
- Changing your password
- Editing your user profile
- Creating and modifying users

Logging On

From your organization Logon page, you can log on to Payment Center, self-register to use the system, or have your password hint emailed to you.

Open your browser. Type the logon URL **http://www.baml.com/paymentcenter** in the Address bar and press **Enter**. The Logon page displays in the browser window.

Tip: Create a favorite or bookmark shortcut in your browser so that you can access the logon page without entering the URL.

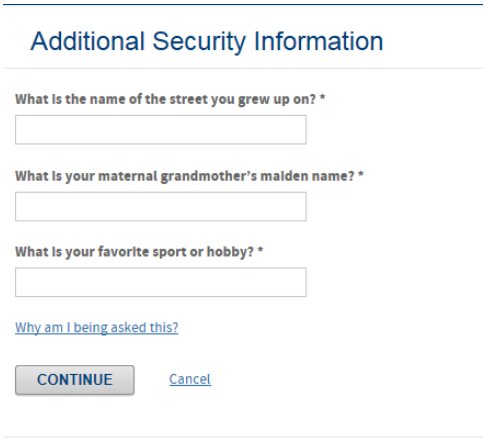


Type your user ID and password in the appropriate fields.

Click **Log on**. One of the following occurs:

- The application *Home* page displays.
- If this is the first time you are logging on to the application, you must provide additional security information used for further verification and security.
- The additional security page displays and you must verify your identity

Providing additional security information:



During Self Registration, you must provide answers to five security questions. This multi-level security measure will help to ensure continued privacy of confidential information along with your user ID and password. To keep your account secure, some of these questions may be asked when you attempt to log on to the system.

Enter the answers to your security questions, and then click **Continue**. If the answers you entered are correct, the *Home* page displays and you can begin working in the card management application.

If you cannot remember the correct answers to your challenge questions:

Contact the Technical Help Desk, 1-888-715.1000 Option 2, 4. After confirming your identity, the Help desk can reset your security questions and password. After the questions are reset, you will need to pick a new set of five questions and specify the correct answers the next time you log on to the application. You may have to specify a new password as well.

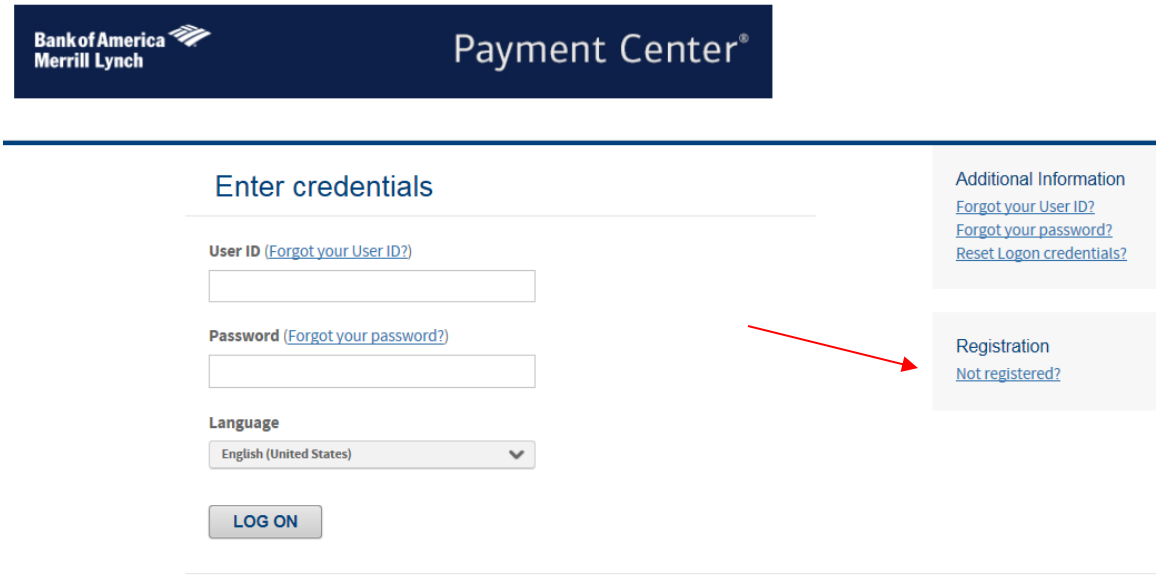
Note: If you answer the questions incorrectly on three attempts, your account is disabled and you must contact the number on the back of your card to re-activate your logon and reset your security questions.

To Self-Register as an Account Holder

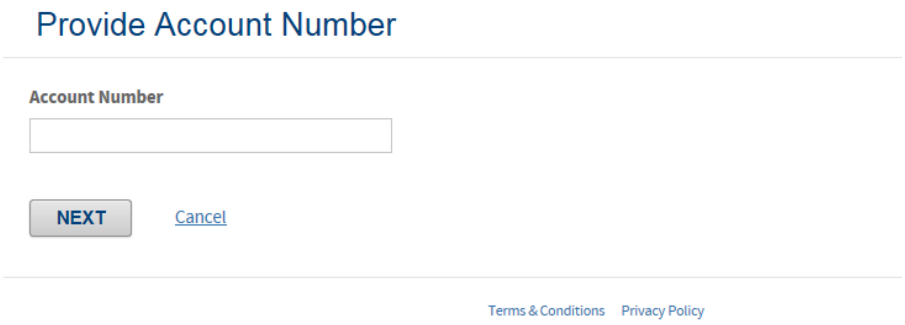
As an account holder, you can self-register to use Payment Center. You can view account statements, view transactions and add other accounts to manage.

You may already have a card account, but not yet be registered to manage your account through Payment Center. In this case, you can self-register by supplying personal and card information and creating a user ID and password.

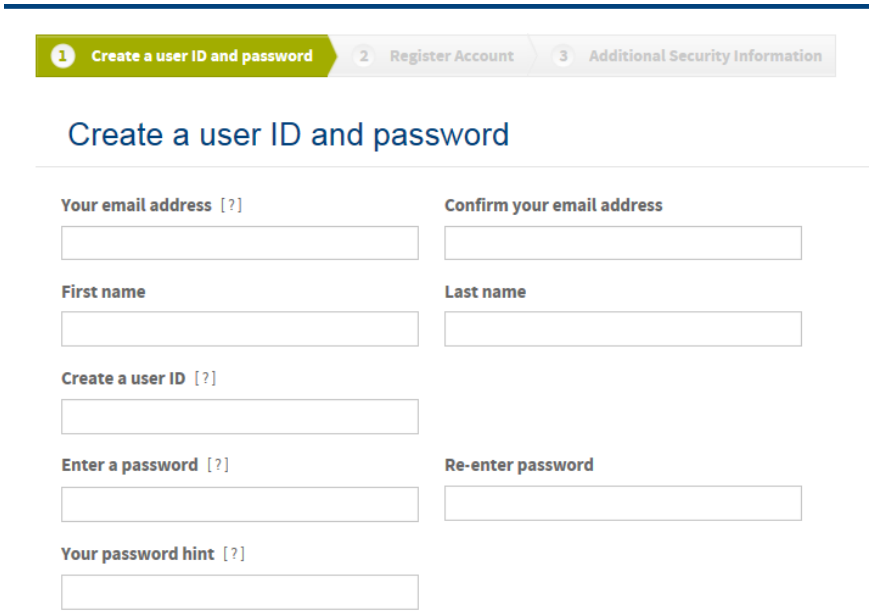
1. Open your browser and access your organization Logon page.



2. On the Logon page click the ***Not registered***? link. The *Provide Account Number* Page displays.



Type the 16 digit account number embossed on your card and click **Next.** The *Create a user ID and password* page displays.



Create a user ID and password

- **Your email address**
  Type your email address. Email notification messages are sent to this address. You can specify more than one address. Separate multiple addresses with semicolons, for example: jdoe@bigcompany.com;john_doe@myhome.org

- Confirm Your email address.

  Enter your email address **a second time exa**ctly as you entered it in the Your email address field. If the**re is a difference between** the Your email address and the Confirm your email address fields (including capitalization), an error message appears and you have to re-enter the addresses.

- **First name**
  Type your first name, without punctuation, in the First field.

- **Last name**

  Enter your last name, without punctuation, in the Last name field.

- **Create a user ID**
  Create a user ID for yourself according to the user ID requirements for your organization. Hold your cursor over the Information icon to see the rules you need to follow when devising your user ID, or see your administrator. User IDs must have a minimum of 6 and maximum of 25 alpha-numeric characters.

- **Enter a password**
  Create a password for yourself according to the password requirements (8-25 characters long with at least 1 lower case letter, 1 upper case letter and 1 number). The password is case-sensitive. Hold your cursor over the Information icon to see the rules you need to follow when devising your password, or see your administrator. Password requirements are:

  - 8-25 characters long
  - At least 1 lower case letter
  - At least 1 upper case letter
  - At least 1 numeric

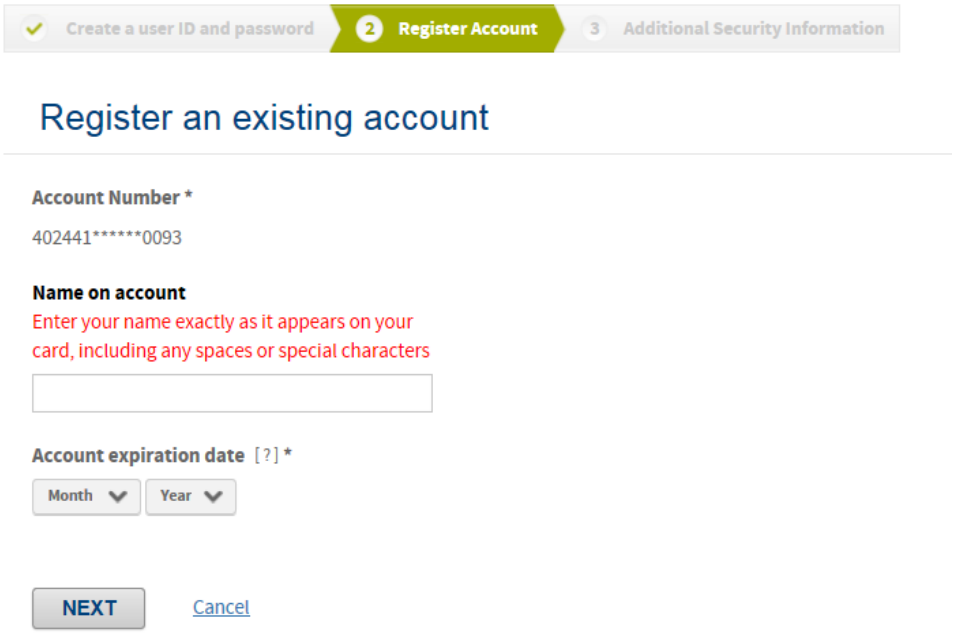
- **Re-enter password.**
  Retype the password. If there is a difference between this field and the Enter a Password field (including capitalization), an error message displays when you save, and you must specify the password again.

- **Your password hint**
  Type a hint that will help you remember your password. This hint can be emailed to you if you forget your password if your organization is set up for email notification.

- **Note**: Passwords expire every 90 days.

- Select Next

Register an existing account

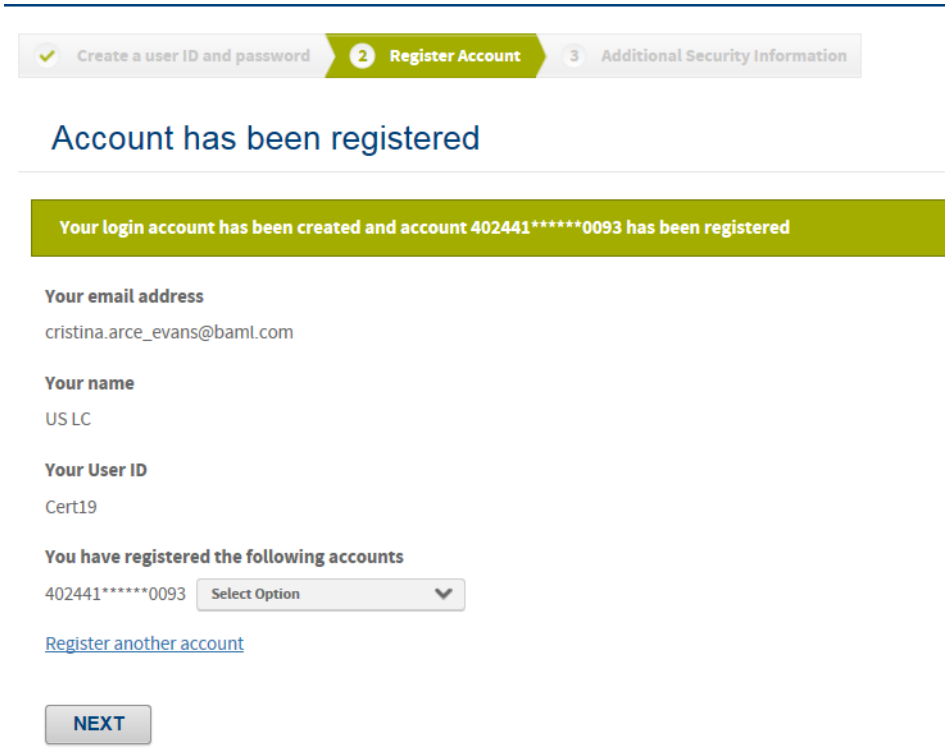


- **Account number**
  The 16-digit number of your existing account. This number is embossed on the card.

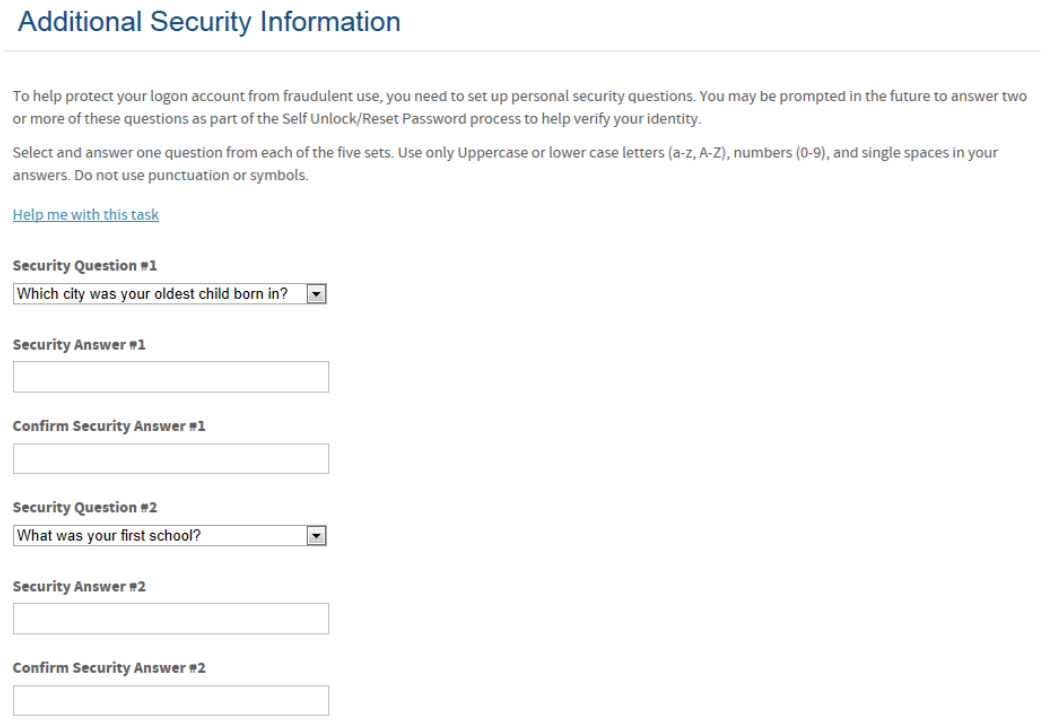
- **Name on account**
  The name on your account, as it displays on the card.

- **Expiration Date**
  The expiration date displayed on the card.

Click **Next**. A confirmation window opens.



Click **Next**. The Additional Security Information page displays.



1. Select security questions from each **Security Questions #** list and provide a **Security Answer** and **Confirm Security Answer** for each question. When you log on at some future date, these questions may be asked to verify your identity. Make sure your answers are accurate so you can remember them.
2. Click **Submit**. The End User License Agreement (EULA) displays.

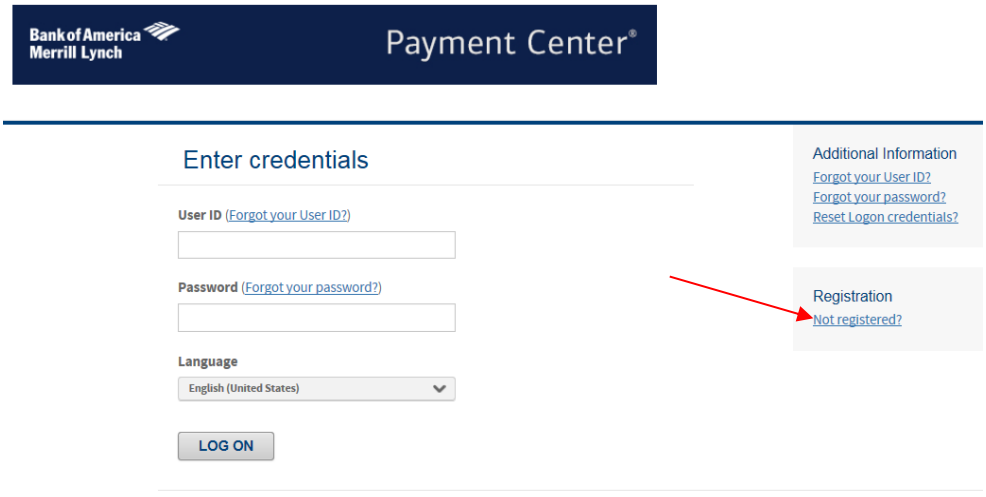
Scroll to the bottom of the license agreement, and click **I Agree, I Disagree**, or **Print**. When you click **I Agree**, your organization Home page opens, and you can perform your online account management tasks. The End User License agreement does not appear again after you agree.

Your organization's Welcome page displays, and you can now perform your online account management tasks.

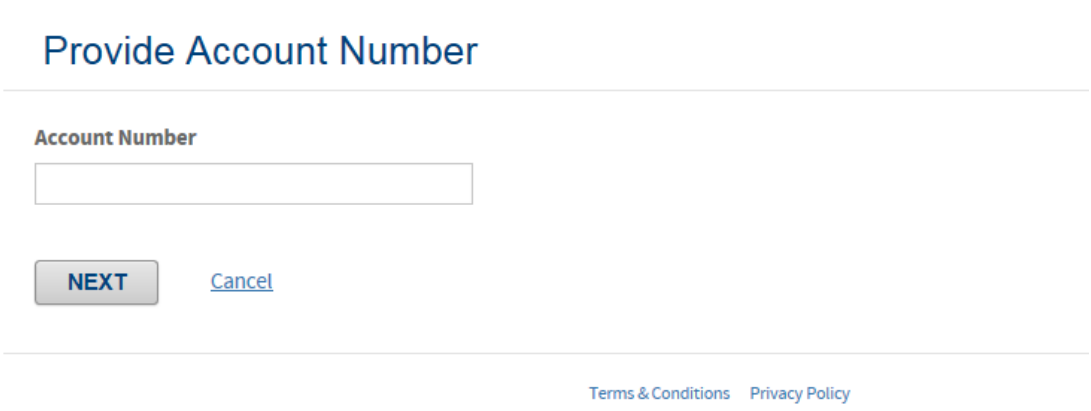
To Self-Register as an Administrator

If you are an administrator for your organization, but you cannot yet access the Corporate account through Payment Center, you can self-register by supplying the corporate account information and creating a user ID and password.

1. Open your browser and access your organization Logon page at www.baml.com/paymentcenter. On the Logon page, click the *Not Registered*? link.

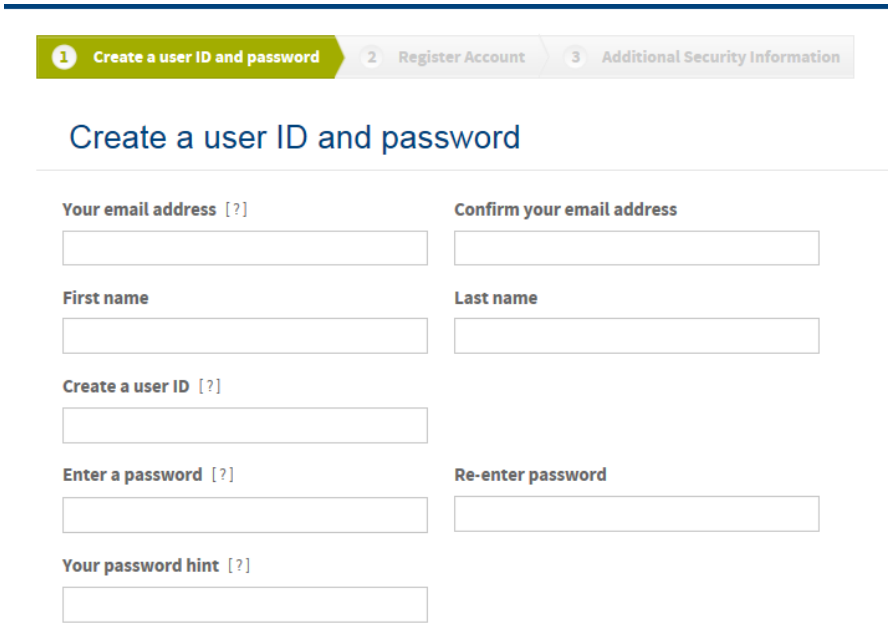


2. The Provide Account Number page appears.



3. Enter **the Corporate Account** Number.

4. Click Next. The create User ID and password page appears.



5.

Create a user ID and password

- **Your email address**
  Enter your email address in the **Your email address** field. Email notification messages are sent to this address

- **Confirm your email address**
  Enter your email address **a second time exa**ctly as you entered it in the Your email address field. If the**re is a difference between** the Your email address and the Confirm your email address fields (including capitalization), an error message appears and you have to re-enter the addresses.

- **First name**
  Enter your first name, without punctuation, in the **First Name** field.

- **Last name**
  Enter your last name, without punctuation, in the **Last Name** field.

- **Create a user ID**
  Create a user ID for yourself according to the user ID requirements for your organization.
  Tip: Hold your cursor over the icon to see the user ID rules for your site.

- **Enter a password**
  Create a password for yourself according to the password requirements for your organization.
  Tip: Hold your cursor over the icon to see the password rules for your site.

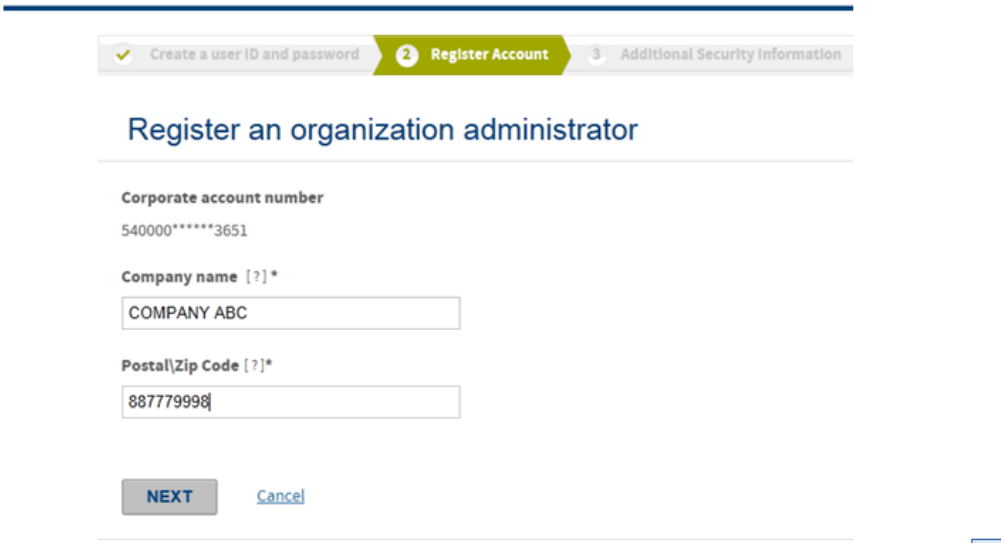
- **Re-enter password**
  Enter the password a second time exactly as you entered it in the previous password field. If there is a

difference between the Enter a password field and the Re-enter a Password field (including capitalization), an error message appears and you have to re-enter the password.

- **Your password hint**
  Enter a hint that helps you remember your password. If your organization is set up for email notification, this hint can be sent to you in an email message when you forget your password.

- Click Next

Register Account

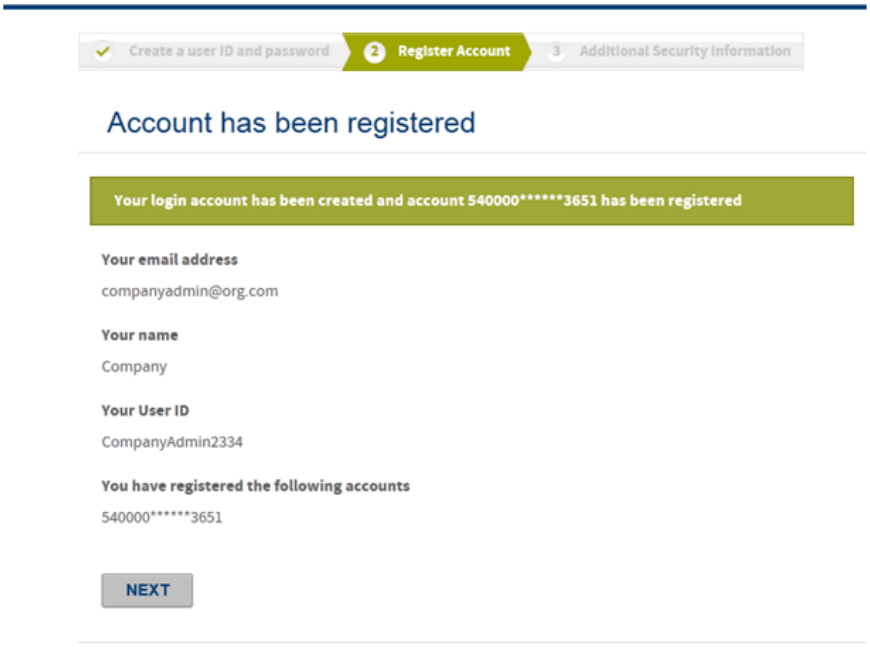


- **Corporate Account number**
  Enter the 16-digit number of the existing Corporate account.

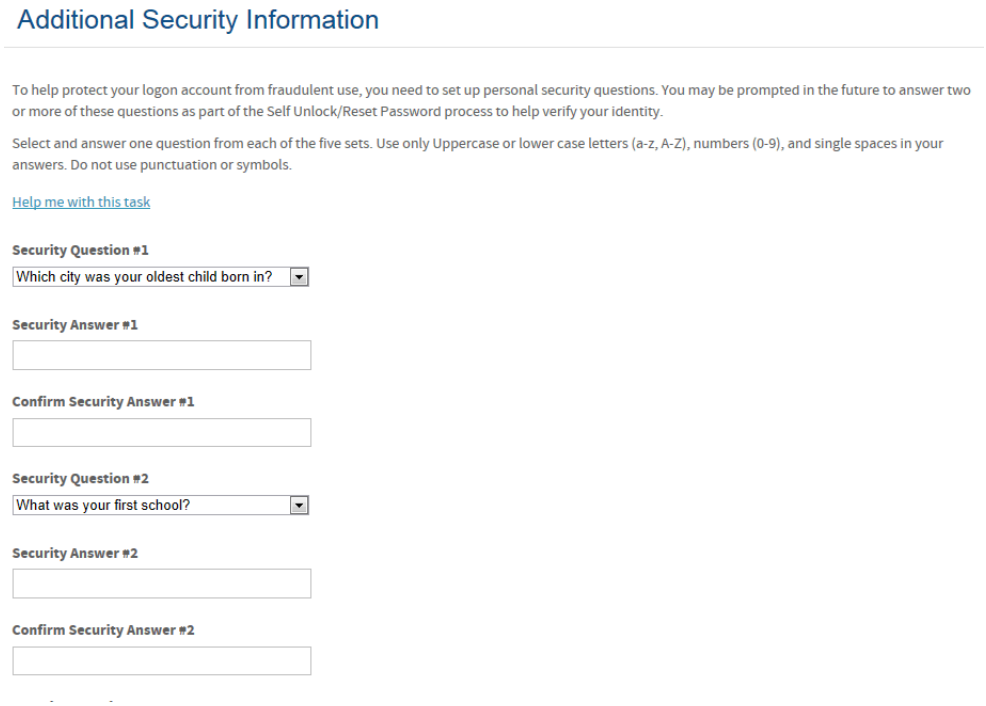
- **Company Name**
  Enter the name of your organization exactly as it appears on the Corporate account.

- **Postal/Zip Code**
  Enter the 11 digit zip code for the Corporate Account. This information c**an be fou**nd on the Payment Coupon from your Corporate Account statement.

6. Click **Next**. A confirmation page appears.



Click **NEXT**. The Additional Security Information page appears.



7. Select questions from the list, then enter and re-enter your answer. The answers should be known only to you. During subsequent logon verifications some of these questions could be asked. You verify your

identity by providing the personal answer. When you have completed all five question/answer sets, click **Continue**. The End User License Agreement (EULA) page appears.

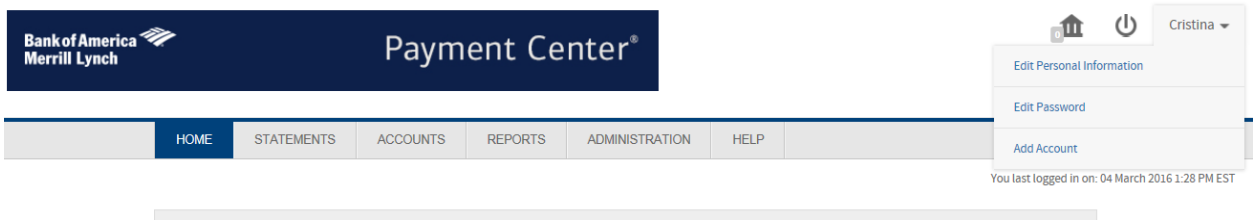
8. After reading the EULA, scroll to the bottom of the license agreement, and **click I agree, I disagree**, or **Print**. When you click **I Agree**, your organization's Welcome page appears, and you can perform your online account management tasks. The End User License agreement page does not appear again after you click **I Agree**.

To Edit Your Personal Information Profile

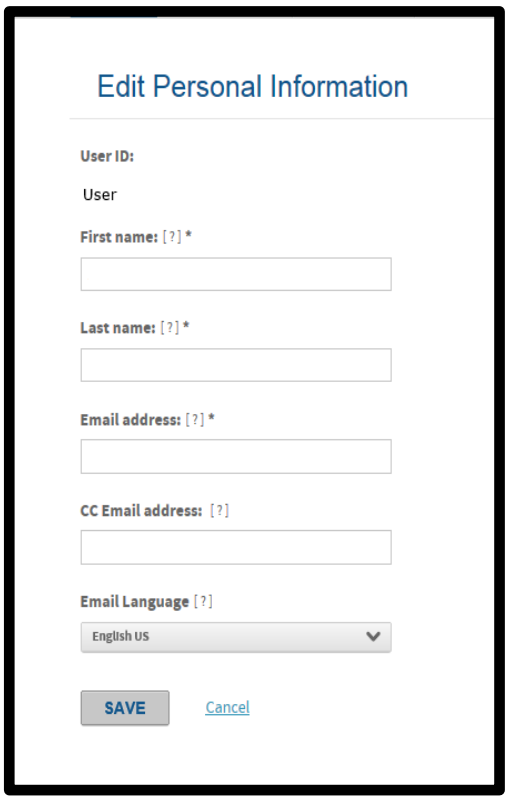
You can change your personal information from the Home page, including your name and email address. **Note:** All fields on this page are required.

Log on to the application. Your organization Home page opens.

When you log on, your name (labeled as *User* in the example below) displays on the upper right of your home page. Click the arrow icon (▼) next to your name to display a drop-down list, click the Edit Personal Information link



The Edit Personal Information window displays, showing your existing personal information. (Your user ID is displayed, but you cannot change it in this window.)

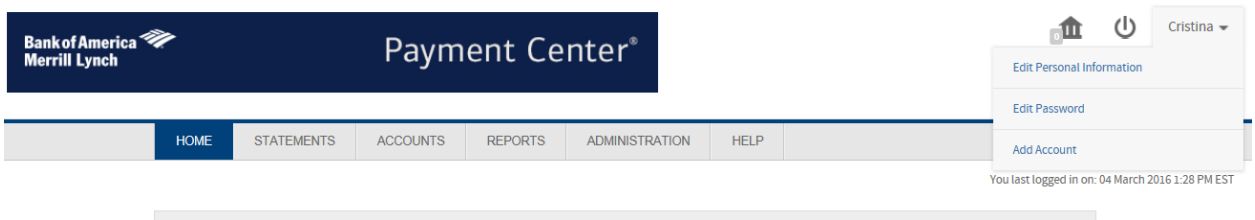


1. Type the first name and last name you want to be displayed on the Home page when you log on.
2. Enter the email address or addresses to which you want notifications sent. Separate multiple addresses with semicolons, for example:jdoe@bigcompany.com;john_doe@myhome.org
3. Click **Save** to save your new profile information.
4. Choose *HOME* from the menu to return to the Home page.

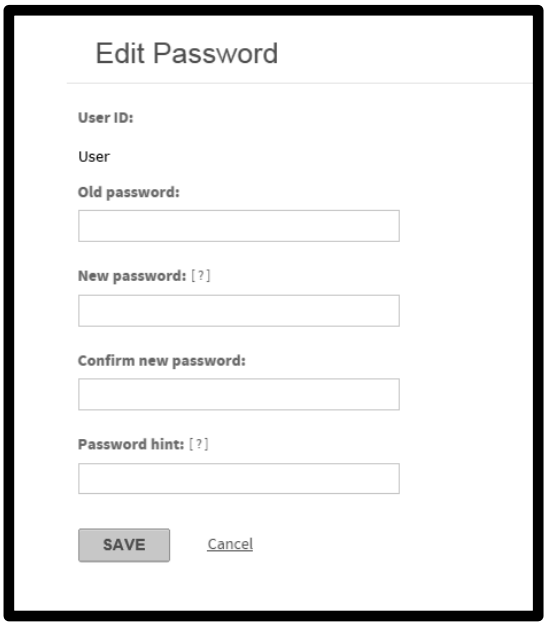
To Edit Your Password

Log on to the application. Your organization Home page displays.

1. You change your password from the home page. When you log on, your name (labeled as *User* in the example below) displays on the upper right of your home page. Click the arrow icon (▾) next to your name to display a drop-down list that has the Edit Password option.



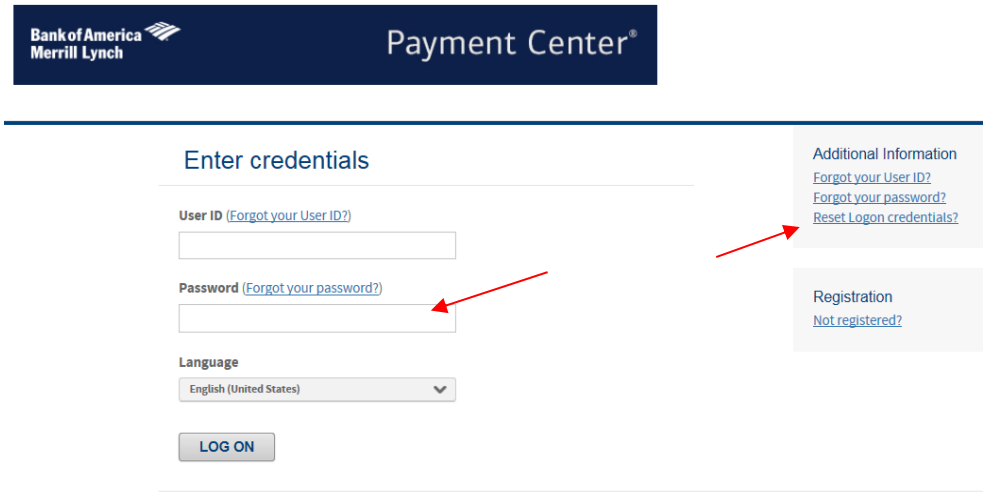
2. The Edit Password window opens.



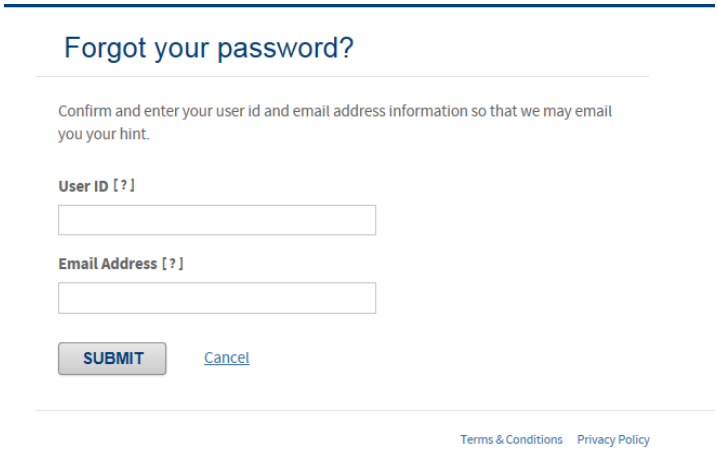
1. In the **Old Password** field, type your existing password.
2. In the **New Password** field, type the new password you want to use according to the password requirements for your organization. The password is case-sensitive. Hold your cursor over the Information icon to see the rules you need to follow in devising your password, or see your administrator.
3. In the **Confirm New Password** field, type the password exactly as in the **New Password** field. If you enter any different characters, including capitalization differences, the new password will not be accepted.
4. In the **Password Hint** field, type a hint that will help you remember your password. This hint can be emailed to you if you forget your password.
5. Click **Save** to save your new password, or **Cancel** to return to the Home page without changing the password.
Note: *Passwords expire every 90 days.*

To Get Information About a Forgotten Password

If you have forgotten your password, on the Logon page, click one of the Forgot your password? Links.

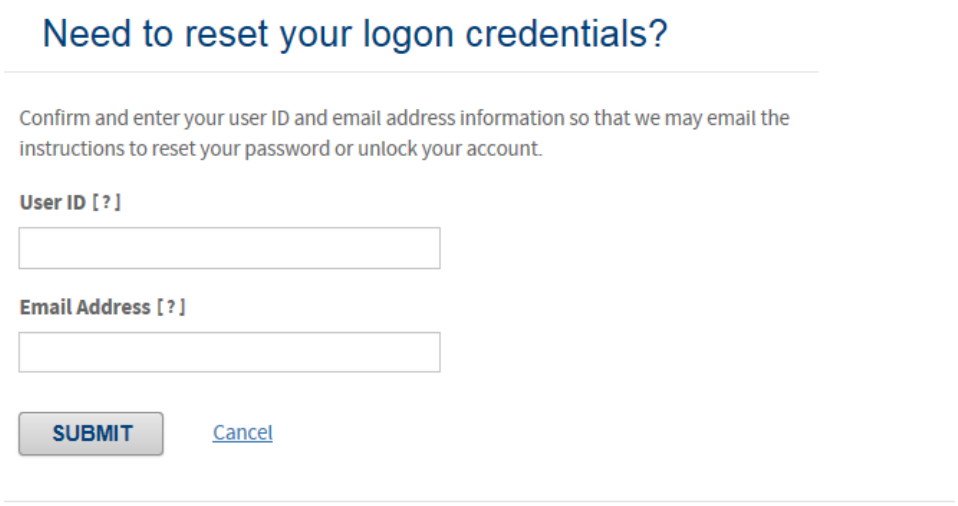


The Forgot your password? window displays.

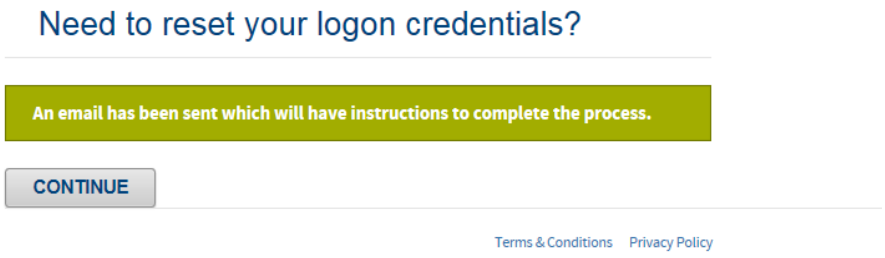


- In the **User ID** field, enter your user ID.
- Type your email address in the Email Address field.
- Click **Submit**. The password hint you specified when you set up your account is emailed to you.

Click the Reset Logon Credentials link. The Need to reset your logon credentials page displays.



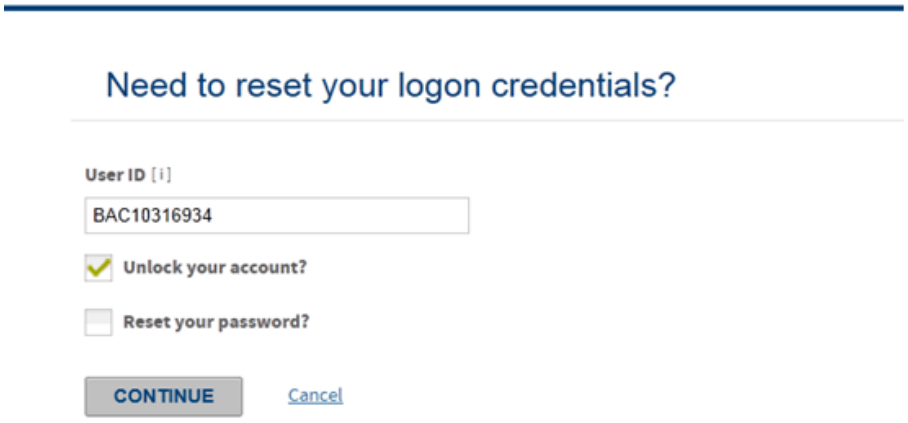
9. Type your user identification and email address in the appropriate fields. Click Submit. The following message appears.



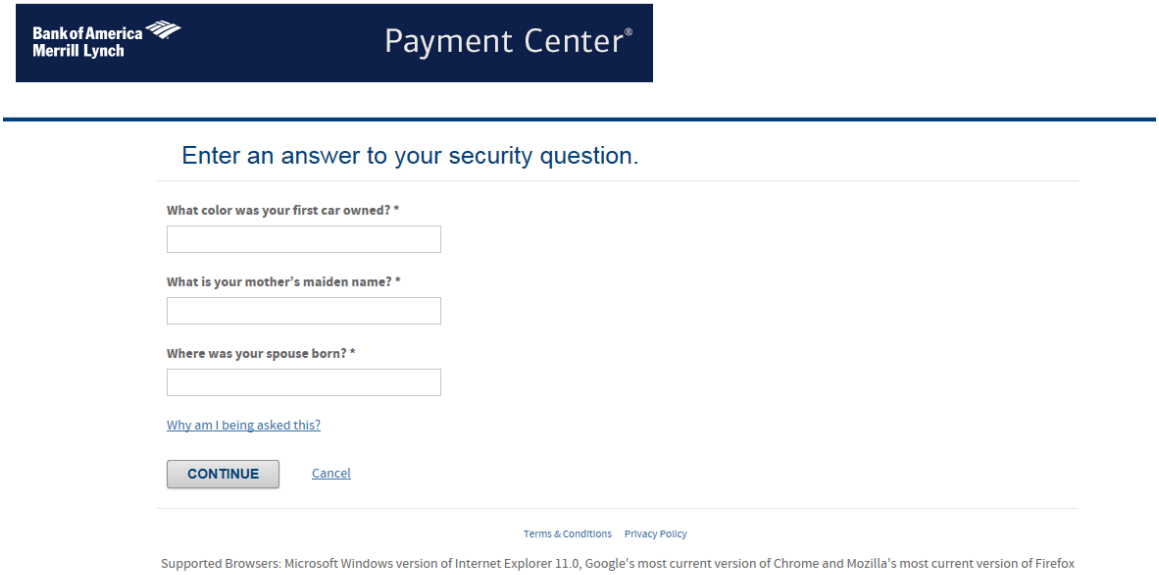
10. You can then close your browser, since an email containing a link specifically for your account unlock/password reset will be sent to the email address designated in your profile.

11. When the reset email arrives, open it and click the enclosed link to open a new browser/logon session. The reset/unlock confirmation page specific to your request opens.

Important: When you select this link, you must complete the reset/unlock process as detailed below. **The link is disabled after the first access and within 24 hours**.



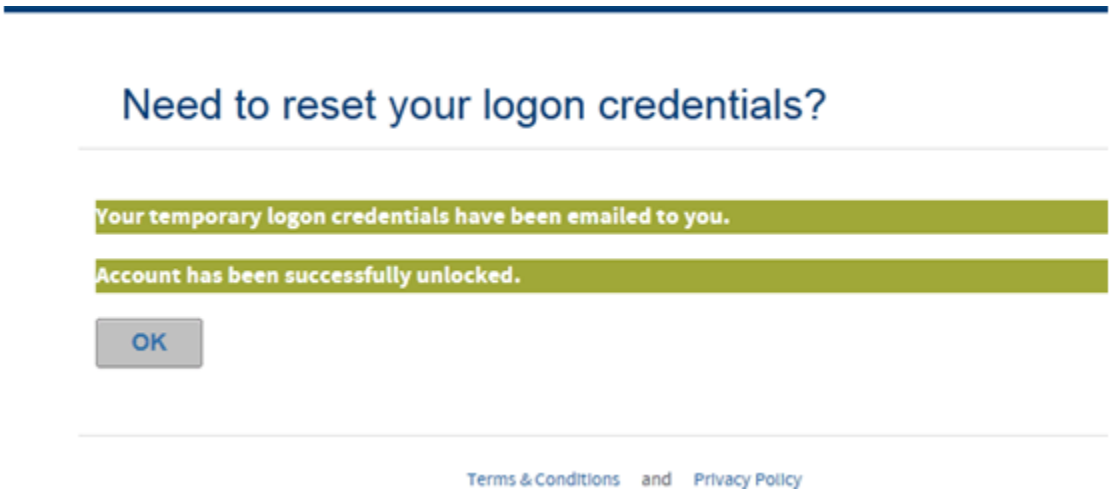
Type your User ID and select **Unlock Account or Reset Password**. To verify your identity, you will be required to answer some of the security questions you created when you first logged on to the system. If you do not remember your security questions, contact the Technical Help Desk to have them reset**.**



12. Type the answers to the security questions and click **Continue**. Depending on what you selected (Unlock Your Account, Reset Your Password, or both), you will see the screen below.

13. **In the example below, you will see Both items if you select both. If you select only Unlock Your Account, you would only see the second sentence.**

14. **If you select only Reset your Password, you would only see the first sentence.**



Click **OK** to open your home page.

Creating and Modifying Users

Only active user IDs can log on to Payment Center. The system security prevents unknown and potentially malicious users from accessing the application and viewing private information. As an administrator, you are responsible for managing the users that can access your site and assigning the functions they may perform on the site.

User information includes name and email address, user ID, and branding and location ID (to associate the user with a site). A user also has permissions assigned to his or her User ID. These permissions are set for that user by assigning a default security profile or through specially-defined individual permissions and control what tasks the user can complete in Payment Center. No one can access your site without a valid user ID and an assigned set of permissions.

This chapter contains the following sections:

- Creating a user
- Working with user access permissions
- Searching for existing users
- Modifying a user
- Importing multiple users

Creating a user

There are several procedures you need to perform to manually create a user in Payment Center. If you do not complete all the procedures, the user will not be able to access Payment Center. The following steps are required to create a new user:

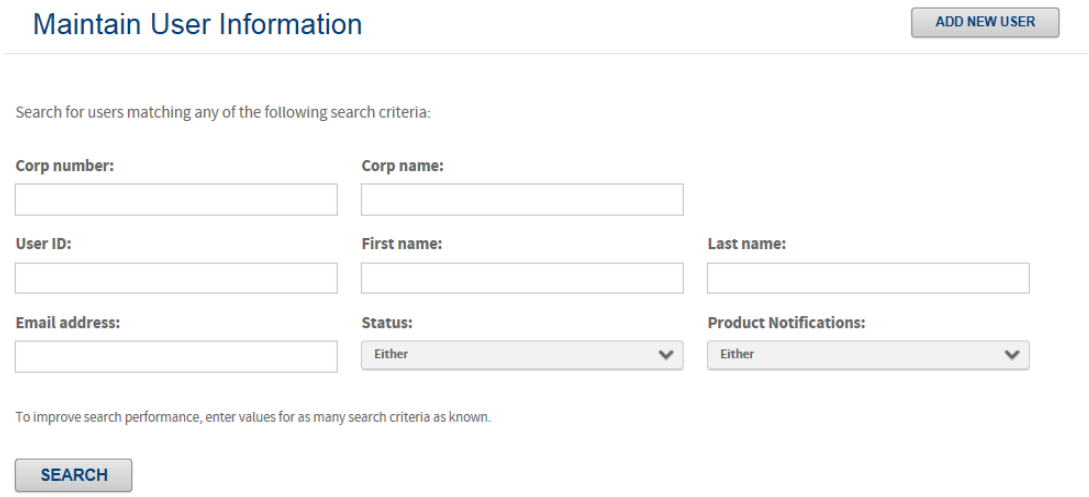
- Enter basic user information.
- Select a hierarchy location and site branding for the user.
- Create a unique user ID and password.
- Assign permissions to the user.

To successfully create a new user, you must complete all the steps listed above. Each step is explained in detail in subsequent procedures in this chapter.

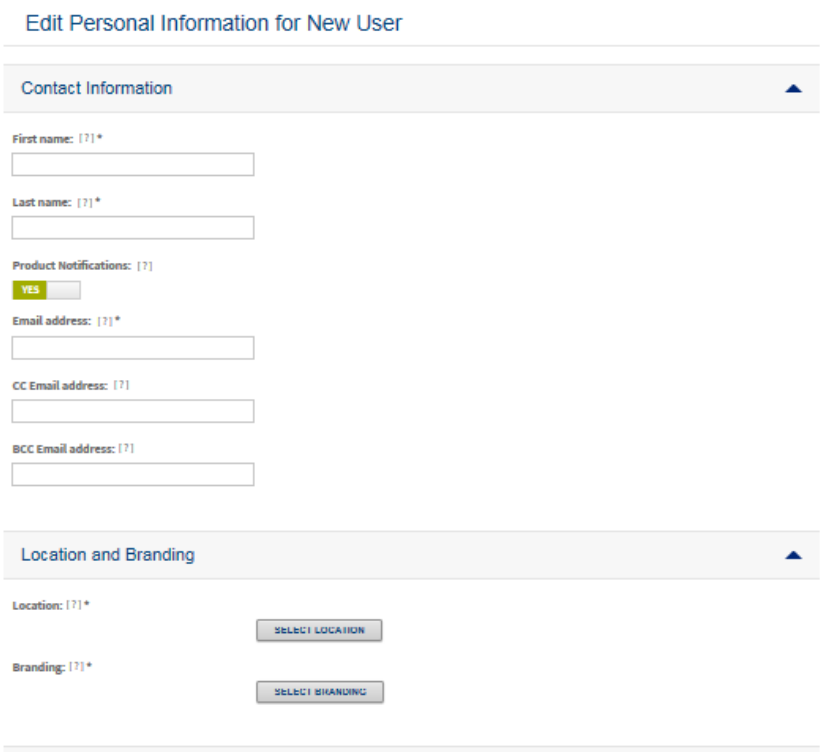
We recommend use of the Self-registration function to set up new users.

Step 1: Enter basic information

1. From the *Administration* menu, select Manage Users > Maintain User Information. The Maintain User Information page appears.



2. Click **Add New User**. The Edit Personal Information for New User page appears.



3. In the **First name** field, enter the user's first name as you want it to display on the Welcome page when the user logs on to Payment Center. This is a required field.

4. In the **Last name** field, enter the user's last name as you want it to display on the Welcome page when the user logs on to Payment Center. This is a required field.

5. Select a **Notification Recipient** option.
   Tip: You can use this setting as a search criterion when searching for users.

6. In the **Email address** field, enter the email address or addresses for this user. Payment Center sends email notification messages to this address, if you selected the appropriate option to do so. This is a required field.

7. In the **CC Email address** field, enter an email address or addresses to which the Payment Center sends copies of the statement availability email. (Note: this instruction applies only to those clients with statement management functionality.)

8. In the **BCC Email address** field, enter an email address or addresses to which the Payment Center sends blind copies of the statement availability email. (Note: this instruction applies only to those clients with statement management functionality.)
   Tip: You can enter multiple email addresses in any of the email fields by separating them with semicolons, for example: jdoe@bigcompany.com;john_doe@myhome.org

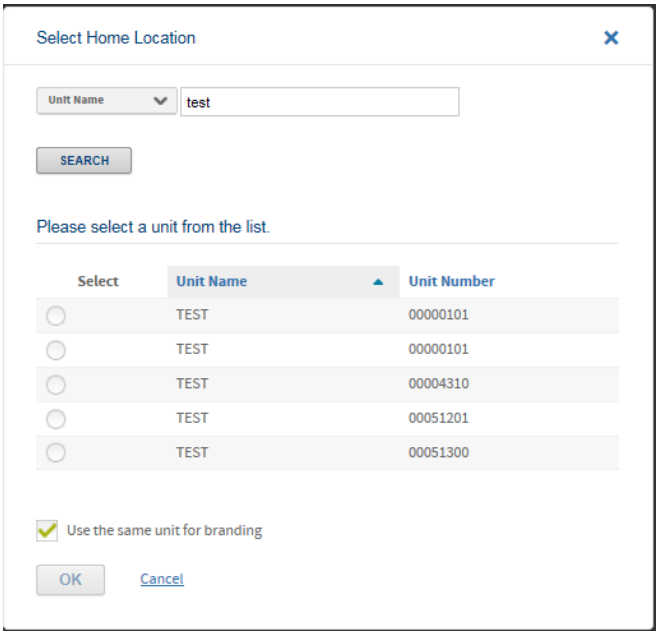
9. Continue creating the user by selecting a hierarchy location and specifying site branding information, as described in "Step 2: Specify Location and Branding Information".

   Important: You cannot save the new user information at this point. If you quit the create user process now, Payment Center does not save the data you have entered to this point.

Step 2: Specify Location and Branding information

Note: You must complete "Step 1: Enter basic information" before you can begin this procedure.

1. Verify that the basic user information is accurate.
2. Click **Select Location**. Your hierarchy appears in a popup window.



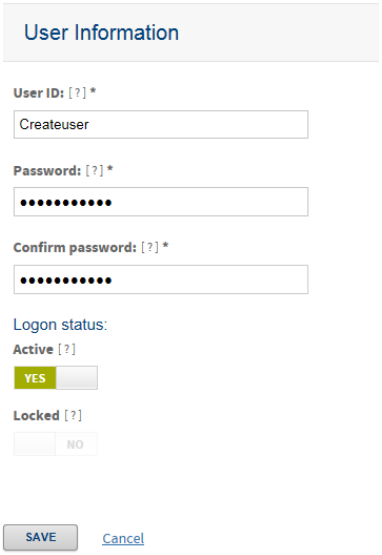
3. Select the unit or subunit (node) from the hierarchy to which this user belongs.
   Note: When you assign a user to a location on the hierarchy, you are granting the user access to view data for the nodes below it on the hierarchy.
4. Check or Uncheck"**Use the same unit for branding".** Depending on your account settings your branding may be the same as your location.
5. Continue the Create a User process by creating a User ID and password for the user (See "Step 3: Create a valid user ID and password").

Step 3: Create a valid user ID and password

Note: You must complete "Step 2: Specify Location and Branding information" before you can begin this procedure.

Complete the following in the User Information section of the Edit Personal Information page:

1. Verify that the selected location and branding information are accurate.
2. In the **User ID** field, enter a user ID for this user according to the ID requirements for the organization to which the user belongs. This is a required field.



3. In the **Password** field, enter a password for this user according to the password requirements for the selected site. The **Password** field is case-sensitive and required.
   Tip: For information on the User ID and password requirements, refer to the Info Icons next to the corresponding fields. The Info icons do not contain any instructions unless the **Branding** field contains a value.

In the **Confirm Password** field, re-enter the password.
Note: If there is any difference between the values you enter in this field and the value in the **Password** field (including capitalization), an error message appears when you save. The **Confirm Password** field is case-sensitive and required.

4. Choose the appropriate Logon Status options:
   - Select Active to enable the logon so that Payment Center will recognize the user's User ID and Password as valid. This is the default.
   - Select Inactive to temporarily disable this user's logon.
5. Continue the Create a User process by clicking Save.

Step 4: Specify user access permissions

Note: "Step 3: Create a valid user ID and password" before you can begin this procedure.

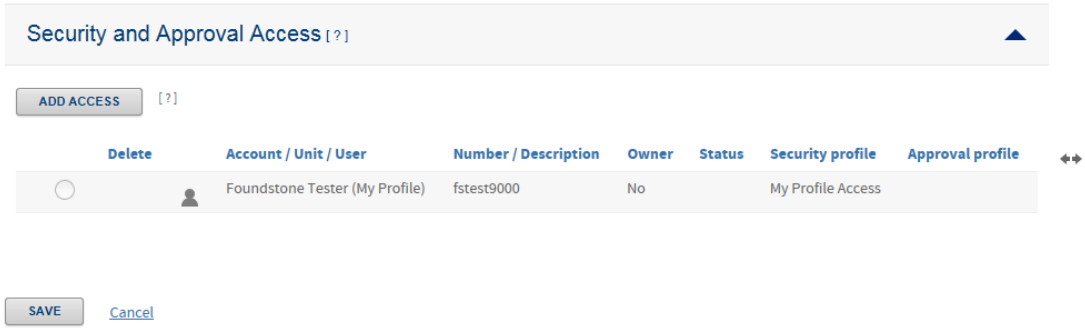
Complete the following procedure to assign permissions to a new user. For information on changing permissions for an existing user and more information on how permissions work, see "Modifying a user".

1. Begin the add access for a new user process by completing one of the following:

- Click **Save** from the Edit Personal Information page (as described in Step 3 or Step 4). A message appears asking if you want to add access to the new user. Click **Yes**.

  Click the **Add Access** link.

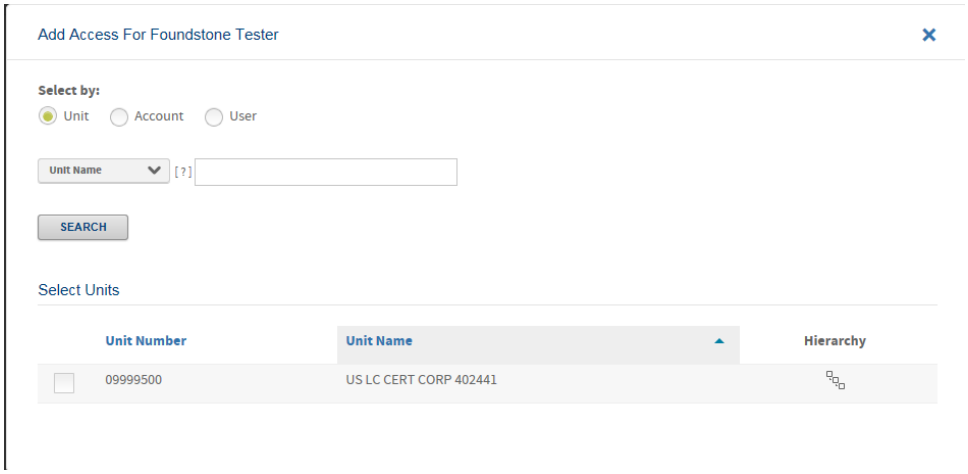
The Security and Approval Access page appears.



2. Click **Add Access**. The Add Access page for this user appears.

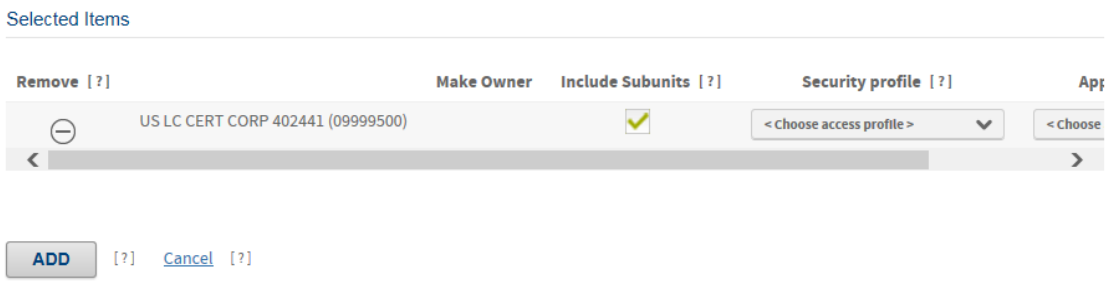
3. Choose a Select By option to indicate whether you want to select a **Unit, Account**, or **User** to control the user's access.

- **Unit**- Select this option to assign Security access to all accounts within the unit.
- **Account**- Select this option to assign access to the specific account without referencing a hierarchy location.
- **User**- Select this option to assign the user as an approver for all of the user's accounts. You can also assign security access for a user to administer other users' profile.



Select the desired unit, account, or user from the hierarchy. The selection appears in the Selected Items list on the page.

Tip: You may need to scroll to view this information.



4. Select a profile from the **Security Profile** list. (Ignore the **Approval Profile** list as this functionality is not currently available.)
5. Click **Save and Return**. The Access page appears, with the new permissions shown.

The new user is created and the user can log into Payment Center using the User ID and password you assigned to him or her.

Working with user access permissions

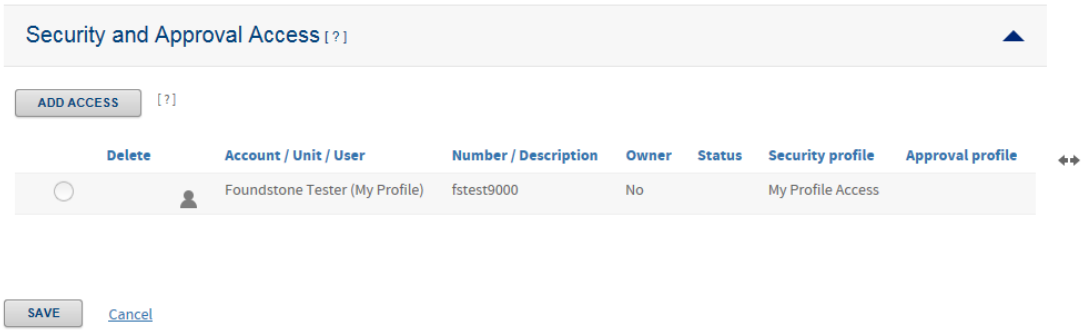
Each user must be assigned permissions that define the tasks that users can perform. Permissions (sometimes called *privileges*) might allow the user to perform administration tasks, manage card accounts, or view reports and other information. Access permissions let the user perform tasks specific to an account, unit, or user. User access permissions are assigned to a user by assigning user security profile and customizing permissions if necessary.

The following section describes three user tasks:

- Adding or modifying permissions
- Tailoring permissions for an individual user
- Adding another set of permissions for a different account, unit, or user

To tailor individual permissions

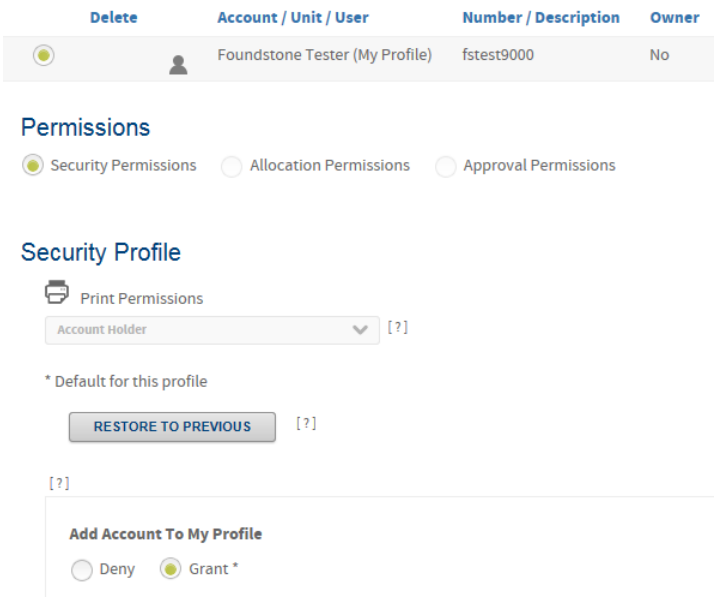
1. From the Administration menu, select *Manage Users > Maintain User Information*. The Search for Users page appears.
2. Enter user search criteria in the appropriate fields and click **Go**. A list of users that match your search criteria appears.
3. From the search results, click the Edit link in the Edit column for the user you want to update. The Edit Personal Information page appears.
4. In the Security and Approval Access section, click the **Edit Access** button. The Access for [*User*] page appears, showing existing permissions.



The Access page displays the following information:

- Accounts, units, and users to which this user has permissions.
- The security profile that defines the permissions that the user has for each account, unit, or user.
- The approval profile assigned to the user. (Ignore this field, as this functionality is currently unavailable.)

5. To modify the existing permissions the user has for an account, unit, or user, select the appropriate row from the Access for [User] page. The Security Profile section appears displaying the permissions for the selected row.

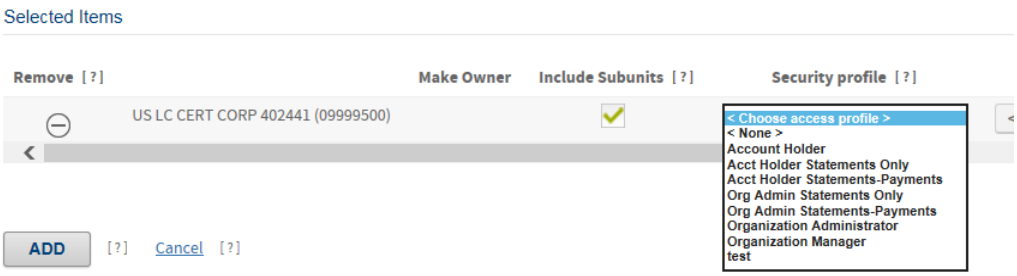


The security profile that defines the permissions appears in the **Security Profile** list. All the permissions that exist for the profile either as defined by default or as modified apply to the selected account, unit, or user.

6. Click the plus sign (+) next to a set of permissions to expand the list, and select either **Grant** or **Deny** next to an individual permission to grant or deny that permission. An asterisk (*) designates the profile's default permission level.
   Note: Depending on the permission, the options may also include **Hide, Display**, and **Edit** rather than **Grant** or **Deny**.

7. Modify the permissions for the selected user as necessary. You can do so using one of the following methods:

- Modify the individual permission for this user's profile.
- Assign a different security profile to the user. Select a profile from the **Access Profile** list. The list of individual permissions changes to reflect permissions in the profile you chose.
  Note: Only profiles applicable to this site appear in the list.

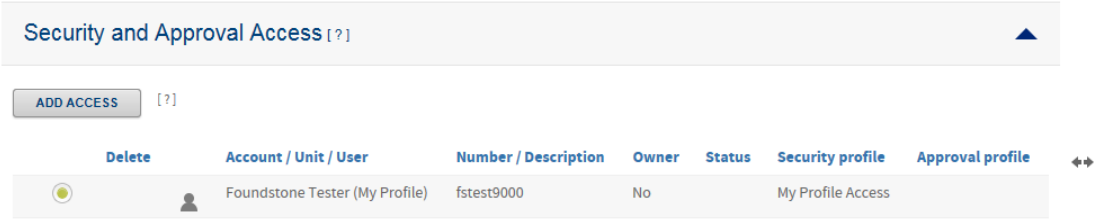


8. Click **Save** when you finish defining permissions for this user and this account, unit, or user. The Access page for this user reappears and you can define other permissions as required.

To add or modify access permissions

Use the list of existing permissions to view the current permissions assigned to a selected user ID. From this list you can modify existing permissions, or add permissions for another account, unit, or user.

1. From the Administration menu, select Manage Users > Maintain User Information.
2. Enter user search criteria in the appropriate fields and click **Go**. A list of users that match your search criteria appears.
3. From the search results, click the *Edit link* in the Edit column for the user you want to update. The Edit Personal Information page appears.
4. In the Security and Approval Access section, click the **Edit Access** button. The Access for [*User*] page appears, showing existing permissions.



5. Click **Add Access**. The Add Access page for this user appears.

6. Choose a Select By option to choose whether you want to select a **Unit, Account**, or **User**.

- **Unit-** Select this option to assign Security access to all accounts within the unit.
- **Account**- Select this option to assign access to the specific account without referencing a hierarchy location.
- **User-** Select this option to assign the user as an approver for all of the user's accounts. You can also assign security access for a user to administer other users' profiles.

7. Select the desired unit (or account or user), from the hierarchy. The selected account, unit, or user appears in the Selected Items list at the bottom of the page.
   Note: You may need to scroll down to view this information.

8. Select a profile from the **Security Profile** list.

9. Select the unit or account options:

- If this is a unit, you can select the **Include Subunits** check box to indicate that the same permissions apply to the user's profile to the subunits of the selected unit.
- If this is an account that has not been registered by another user, you can select the **Make Owner** check box to register this user to the account.

10. Select a profile from the **Approval Profile** list.

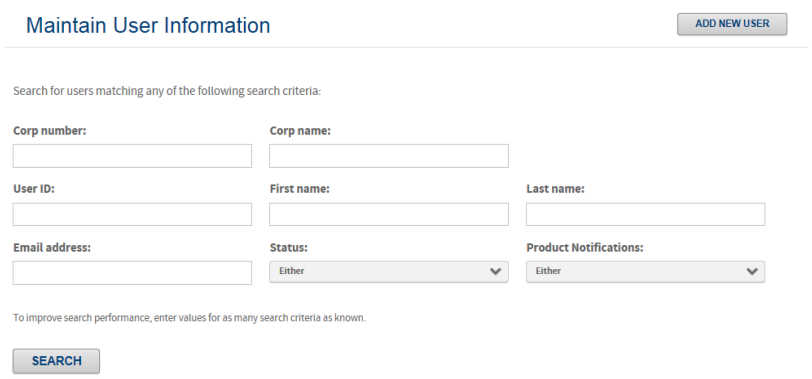
11. Click **Save and Return**. The Access page appears, with the new permissions shown.
    Note: Click the corresponding ✗ icon to delete any account, unit, or user from the list.

Searching for existing users

To view or edit an existing user's information, you must first find them in Payment Center. When you work with a user's information, you must use the Manage Users page to find the user information. Once you select the desired user from the Manage Users page, you can select the individual user to modify his or her information. You can also export the information shown in the Search Results list to a location that you can specify.

To search for a user

1. From the *Administration menu*, select *Manage Users* > *Maintain User Information.* The Search for Users page appears.



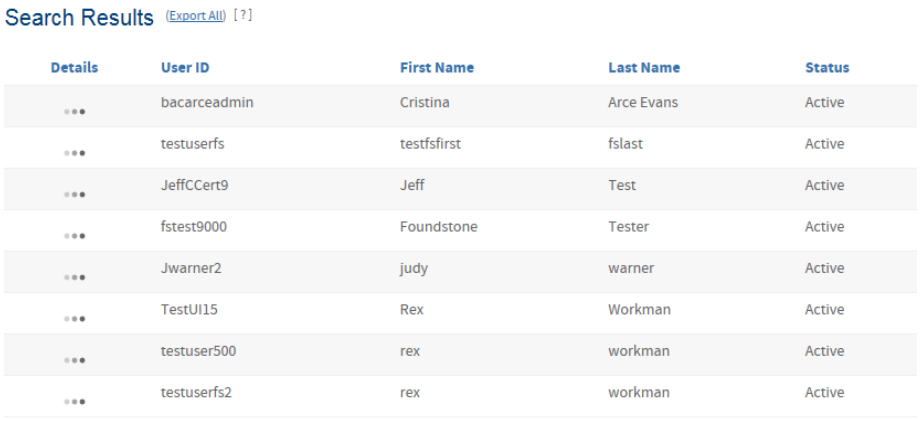
2. Specify some or all of the following search criteria. The search performance increases by providing as much information as possible.
   Important: Use leading or trailing wildcard characters (*) in partial text searches only. Do not embed a wildcard character within a text search string.

- **Bank Number** - Enter the bank number in this field. You can only enter numbers in this field. Up to 4 digits can be used. No wildcard characters are permitted. The field is only visible are bank level or above.
- **Corp number** - Enter the corporation number assigned to a user's organization in this field. You can only enter numbers in this field. Up to 8 digits can be used. No wildcard characters are permitted. The field is only visible are bank level or above.
- **Corp name** - Enter the corporation name of the user's organization in this field. Alphanumeric wildcard searches are permitted. The field is only visible are bank level or above.
- **User ID** - Enter the user's logon ID he or she uses to log on to Payment Center in this field. Alphanumeric wildcard searches are permitted.
- **First name** - Enter the user's first name in this field. Alphanumeric wildcard searches are permitted.
- **Last name** - Enter the user's last name in this field. Alphanumeric wildcard searches are permitted.
- **Status** - Select the user's status option.
- **Email address** - Enter the user's email address in this field. Alphanumeric wildcard searches are permitted.
- **Notification recipient** - Select the user's product notification setting.

3. Click **Go**. All users matching the value you specified display in the Search Results list.

To use the Search Results list

If your search is successful, one or more users are displayed in the Search Results list:



The Search Results list is displayed in last name order.

You can perform the following tasks on this page:

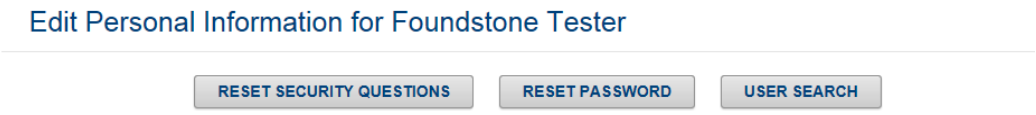
- Reorder the results display: Click the column heading by which you want to reorder the display. The list is reordered in ascending order, based on that column. Click the column heading again to reorder in descending order.
- Page through a multi-page list of results: The results initially shown on a page may not represent the entire set of results. Click a page link at the bottom of the list to further search results.
- Delete a user: Click the Delete icon next to the user listing. A warning message appears. Click **OK** to continue with the delete or **Cancel** to discontinue the delete.
    - **CAUTION:** Deleting a user is a permanent action. There is no way to recover a deleted user.
- **Modify the user's information or permissions:** Click the *Edit* link to modify user or permissions information. The Edit Personal Information page appears.
- **Emulate a user**: Disregard this icon, as the emulation functionality is not currently active.

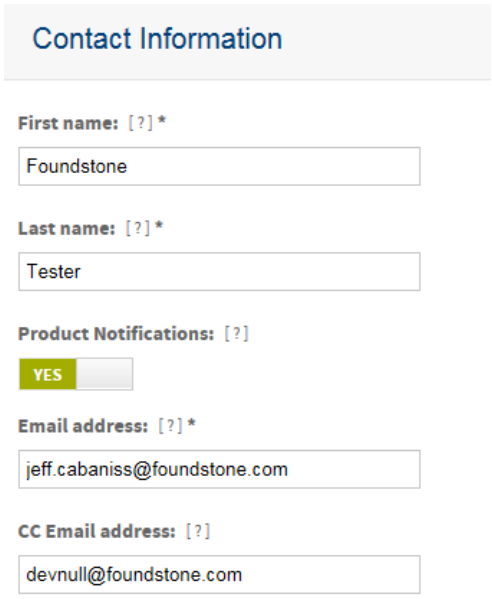
Modifying a user

You can modify information for an existing user, including resetting the user's password.

To modify user information

1. From the Search Results list, click the Edit link for the user whose profile you want to modify. The Edit Personal Information for [User] page appears.





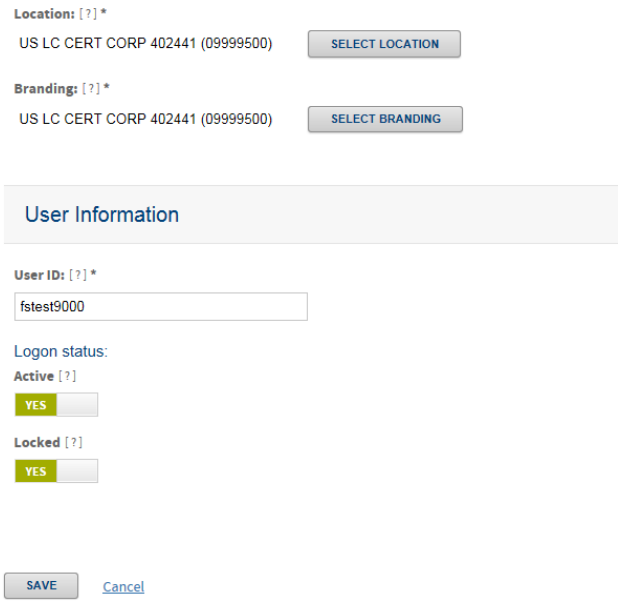
2. In the Edit Profile page, modify user information in the following fields:

Contact Information

First name
Enter the user's first name. This appears on Payment Center's Welcome page.
Last name
Enter the user's last name. This appears on Payment Center's Welcome page.
Notification Recipient
You can use this setting as a search criterion when searching for users.
Email address
Enter the email address for this user. Payment Center sends email notification messages for this user to this address.
CC email address
Enter an email address to which Payment Center sends copies of statement availability notifications. Separate multiple addresses with semicolons. (Note: this instruction is only applicable to clients with statement management functionality.)
BCC email address
Enter an email address to which Payment Center sends blind copies of statement availability notifications. (Note: this instruction is only applicable to clients with statement management functionality.) Separate multiple addresses with semicolons.
Note: You can enter more than one address in any of the email fields by separating addresses with semicolons, for example:
jdoe@bigcompany.com;john_doe@myhome.org

Location and Branding

Location
Enter the default location with which this user is associated. Click **Select** Location and select a unit or subunit from the hierarchy.



Branding
Branding is usually the same value as the location but there are some exceptions.

User ID and Password

User ID
Enter a user ID for this user according to the ID requirements for this organization. Hold the cursor over the Information icon next to the **Logon ID** field to see a list of user ID rules in effect for your organization.
Logon Status *option*

- Select **Inactive** to disable this user's logon temporarily. (Alternative setting is **Active**.)
- Select **Unlocked** to unlock a user's logon after the user has accidentally locked the logon by repeated unsuccessful logon attempts. ("**Locked**" is the alternative setting.)

3. Click Save. Payment Center saves the modified user information.

To reset the user password and security questions

To reset the password from the Personal Information page, click **Reset Password**. If password email notification is active for the user's site, an email is sent to the user containing a new, randomly generated password. Otherwise, the new password displays and must be communicated to the user. The user must change the password after logging on to Payment Center.

To reset the user security questions from the Personal Information page, click **Reset Security Questions**. Payment Center resets the user's security questions. The next time the user attempts to logon on to Payment Center, the user must re-enter his or her additional security questions and answers.

To export user information from the Search Results list

You can export the list of users shown in the entire Search Results list (all pages) to a tab-delimited text file (.TXT) for viewing or printing.

1. Use the Search for Users page to find the set of users for whom you want to export information.
2. With the Search Results list displayed, click **Export All**. A file download dialog appears.
3. Click **Save**. A Save As dialog appears.
4. Enter a file name and location, and click **Save**. The user information file saves to the specified location.