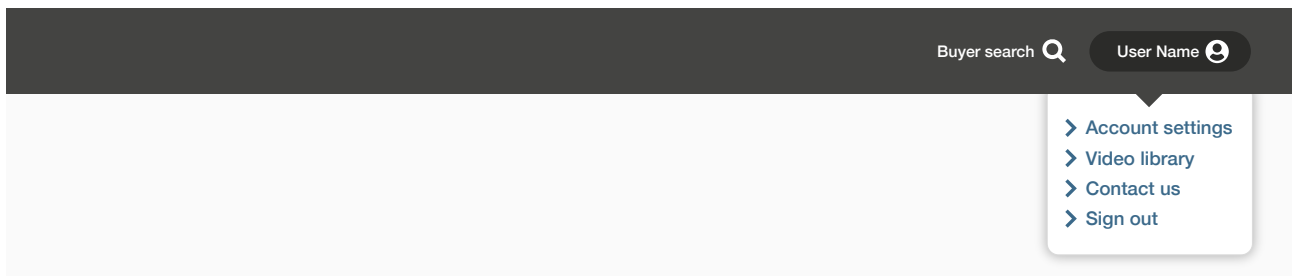# Guide 12 - Account settings

Accessing your Account settings

To view or amend your account details within Atradius Atrium, you can access the Account settings from the black header bar. This is accessible from the drop down menu which appears when clicking on your user name at the top right of each page.

Buyer search 🔍   User Name 👤

> Account settings
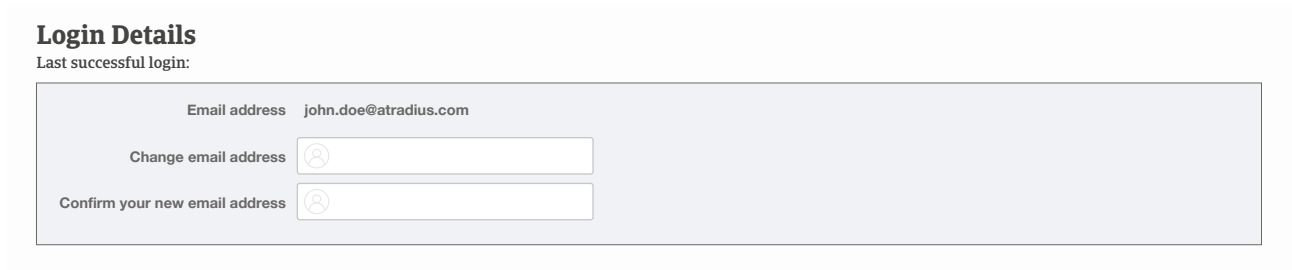> Video library
> Contact us
> Sign out

When selecting the Account settings option, a new screen will appear. This area provides four additional categories from which you can review and amend your existing details and system preferences.

Account Settings
Your account

| User profile | Account defaults | Communication preferences | Export preferences |
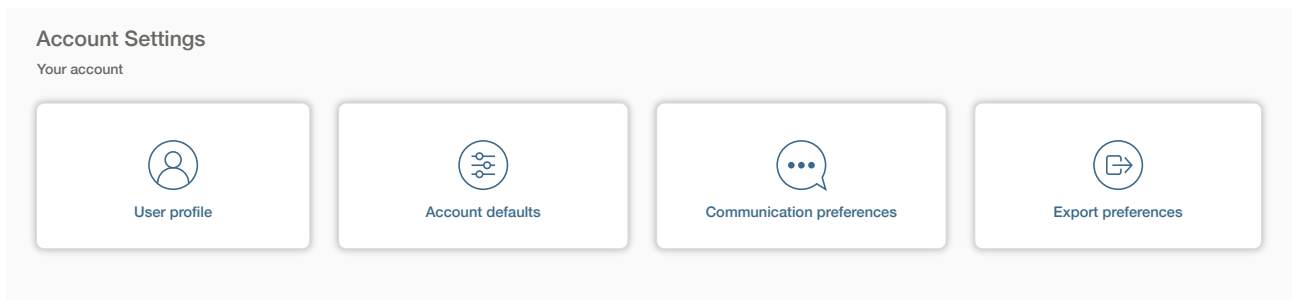
Viewing your User profile

Selecting the User profile option will present all information used to help you work with Atradius Atrium. Here you can change your email address which will be used to send you online notifications, for instance when there are changes within your portfolio or when you request a policy document via Atradius Atrium.

Login Details
Last successful login:

Email address	john.doe@atradius.com
Change email address	
Confirm your new email address	

You can reset your password whenever needed from the User profile page. A help text is provided to help you meet the required security criteria for your Atradius Atrium account. You can also change your security questions and answers, which you need to reset your password in case you forgot it.

Change password

Current password	🔒
Change password	🔒 ⓘ
Confirm your new password	🔒

Security Questions

Question 1	What is the name of your first school? ▾	👤
Question 2	What is the make of your first car? ▾	👤
Question 3	What is the name of your first pet? ▾	👤

Under Personal details you can change your first and last name, which will be displayed next to any credit limit applications or non-payments cases that have been submitted or amended by you.

Personal Details

First name	John
Last name	Doe
Change first name	👤
Change last name	👤

Finally, you can also set the preferred language that Atradius Atrium will appear in from over twenty supported languages.

Preferences

Display language	English ▾

When you are happy with the details provided within the User profile screen, you can click on the Save changes button at the bottom of the page.

ⓘ Please note that after making changes to your User profile details, you will need to sign out of Atradius Atrium and log back in for these to take effect.

Viewing your Account defaults

The Account defaults page can be used to set a number of default selections which will be automatically applied to various screens within Atradius Atrium.

Account defaults

Manage your account default settings here, these changes will take immediate effect in the application

Select default country for buyer search

Please select a country ⌄

Select default policy

Please select a policy ⌄

Select default pagination size

5 ⌄

Save

There are three values for which you can select a default choice:

Default country for buyer search	When searching for a new buyer, you will need to limit your search to a single buyer country before entering additional search details. From your Account defaults, you can set the buyer country that will automatically appear as your selected choice within the New buyers tab of the Buyer search page.
Default policy	When viewing or performing any credit management activities, you can focus on the whole portfolio or on a specific policy or policy group. From your Account defaults you can set a specific policy selection as default. This policy or policy group will automatically appear anywhere a specific policy context can be applied. For instance, when you view the list of credit limits or nonpayments, or when you apply for cover or submit a case on a selected buyer.
Default pagination size	When viewing a list of results, Atradius Atrium will present a set of pagination options at the bottom of the page. One of these options will show you how many results are shown on the page, which can be amended to show greater or fewer results per page. From your Account defaults, you can set all result pages to show 5, 10 or 20 items per page wherever a list of items is presented within Atrium.

When you are happy with your selection, you can click on Save at the bottom of the page.

💡 **TIP** Read Guide 3 - Buyer search to learn more about searching for a buyer

💡 **TIP** Read Guide 5 - View Buyer details to learn more about viewing details for a selected buyer

💡 **TIP** Read Guide 7 - View list of Credit limits to learn more about viewing your list of credit limits

💡 **TIP** Read Guide 8 - View list of Non-payments to learn more about viewing your list of non payment cases

Viewing your communication preferences

Whilst Atradius Atrium displays a list of all communications published in relation to your portfolio, you may find that you do not wish to be notified of certain changes or updates. If so, you can tailor which notifications are generated and through which channels you will receive them on the communication preferences page.

The Preferred notification channel section allows you to choose between whether you only want to receive messages via the communications page in Atradius Atrium, or if you would also like these to be sent to your email address. Email alerts can be particularly useful when you are not logged into Atrium, as you can still be informed of any actions or events which require your attention.

^ Preferred notification channel

○ Online and email   ● Online only

You will find the four main communication categories which reflect your view of the policy or portfolio. Each panel can be expanded to show specific alerts, events and updates relating to these activities, with a checkbox presented next to each item. Notifications will only be received for communication items which have been selected. You can also use the 'Select / Deselect all' option at the top right of each panel allowing for preferences to be quickly reset.

^ Buyer cover   ☑ Select / Deselect All

☑ Application requested	☑ Buyer rating changes	☑ Buyer review
☑ Buyer review submissions	☑ Cancellation of cover	☑ Cancellation requested
☑ Credit limit cost changes	☑ Credit limit portfolio review	☑ Credit limit reduced
☑ Expiration of cover	☑ Fully approved decision	☑ Historic cover
☑ Maximum credit limit thresholds	☑ New cover opportunities	☑ Partial decision
☑ Withdrawal of cover	☑ Zero decision	

^ Claims   ☑ Select / Deselect All

☑ Case update	☑ Claim payment authorised	☑ Claim received
☑ Collection case received	☑ New / amended monitor case	☑ Payment received on collection / claim
☑ Positive judgement	☑ Preliminary calculation of liability	

^ Declarations   ☑ Select / Deselect All

| ☑ Declaration reminder |

^ Policy   ☑ Select / Deselect All

| ☑ Country changes | ☑ Country schedule changes | ☑ Credit limit amount changes |
| ☑ Invoice sent | ☑ Policy renewed | ☑ Premium schedule changes |

When you are happy with your selections, you can click on Save at the bottom of the page.
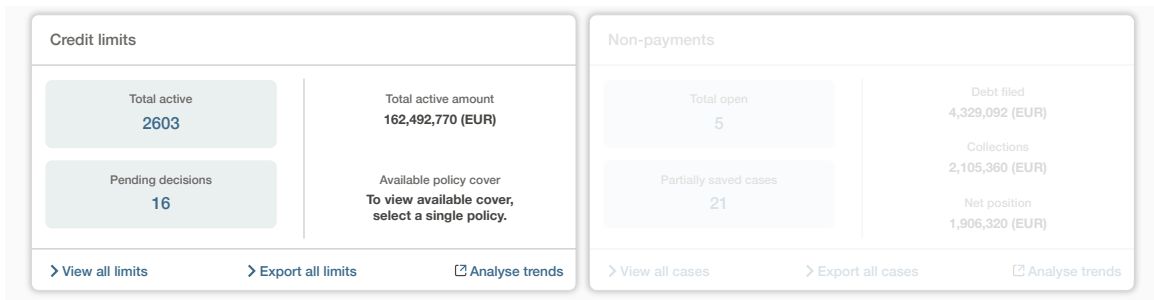
Viewing your Export preferences

The Export preferences page allows you to view and select which fields will appear within the credit limits export file. This file can be generated from the Credit limits panel on the Credit management page.

> **TIP**
>
> **Credit limit overview**
>
> The Credit limits panel on the Credit management page allows you to access all your credit limits by clicking the 'View all limits' link. Alternatively, you can select the number of total active credit limits and pending decisions for your selected policy or policies. This will automatically take you to the Credit limits page, where the relevant details will be displayed as a list. You will also be able to download a list of your credit limits by selecting the 'Export all limits' link, where a file will be generated and presented under the Exported files tab of the File Import and Export page.
>
> | Credit limits | | Non-payments | |
> |---|---|---|---|
> | **Total active**
 2603 | **Total active amount**
 162,492,770 (EUR) | Total open
 5 | Debt filed
 4,329,092 (EUR) |
> | | | | Collections
 2,105,360 (EUR) |
> | **Pending decisions**
 16 | **Available policy cover**
 To view available cover, select a single policy. | Partially saved cases
 21 | Net position
 1,906,320 (EUR) |
> | › View all limits | › Export all limits   ⬈ Analyse trends | › View all cases | › Export all cases   ⬈ Analyse trends |

> **TIP**
>
> Read Guide 2 – Credit management page to learn more about accessing the credit limits overview

> **TIP**
>
> Read Guide 11 - Exporting files to learn more about exporting your credit limits

For each field shown under the Export options panel, a checkbox will be presented. Where a checkbox has been selected for any field, these will appear in the export file. You can also use the 'Select / Deselect all' option at the top right of the panel allowing for preferences to be quickly reset.

∧ Credit limit export columns		☑ Select / Deselect All
☑ Customer ID	☑ Legacy policy ID	☑ Customer name
☑ Customer reference	☑ Buyer ID	☑ Buyer name
☑ Buyer address	☑ Buyer city	☑ Buyer postcode
☑ Buyer area	☑ Buyer country name	☑ Buyer country code
☑ National reg number	☑ Buyer VAT number	☑ Dun & Bradstreet
☑ Credit reform	☑ Teikoku	☑ Fiscal code
☑ Trade sector	☑ Trade sector description	☑ Current buyer rating
☑ Current buyer rating class	☑ Current buyer rating date	☑ Previous buyer rating
☑ Previous buyer class	☑ Buyer rating change	☑ Credit Limit ID
☑ Policy currency name	☑ Policy currency code	☑ Credit limit application amount (policy currency)
☑ Total credit limit decision amount (policy currency)	☑ Credit limit decision amount 1 (policy currency)	☑ Credit limit decision amount 2 (policy currency)
☑ User currency name	☑ User currency code	☑ Credit limit application amount (user currency)
☑ Total credit limit decision amount (user currency)	☑ Credit limit decision amount 1 (user currency)	☑ Credit limit decision amount 2 (user currency)
☑ Application date	☑ Decision date	☑ Expiry date amount 1
☑ Expiry date amount 2	☑ Effect from date	☑ Withdrawal date
☑ Decision type	☑ Credit limit condition amount 1	☑ Credit limit condition amount 2
☑ Credit limit condition total amount	☑ Future events flag	☑ Non payments indicator

When you are happy with your selections, you can click on Save at the bottom of the page.