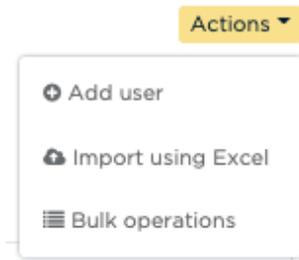


How to manually create a user or admin account_

This manual will explain how:

- to manually create a new user account,
- to be used either as a key contact, or as an administrator.



First, go to the user overview. There, click on the yellow 'Actions' button and select the option "Add user". This opens the form area where you fill out all the user data.

Dashboard / Users / Add

Add user

Choose image No file chosen

First name

Last name

Email

Gender

Mobile number

Office number

Linkedin

Custom URL

Required fields to set up a user account are their email address and the first & last name. Gender is optional and works with a dropdown field. All other fields are optional.

For key contacts, if you add a phone number or a LinkedIn URL, these will be visible in the front-end for the onbordee to click on. You can also add a picture or an icon.

Roles

- Super Admin
- Prospects
- Main Administrator

If you're creating an administrator account, this is where you select the type of admin role this user should have. Just check the box of the role you need.

Filters Select filters below to give the user access to specific content. No filters applied will mean the user will not see any content.

Departments ⓘ

Marketing
Engineering
Sales

Cancel Save

Lastly, we need to assign the correct filters. This is important, because the filters determine what the administrator is able to see when they log into the platform. Please make sure to add **at least one filter value per category**. For more information on the filters, please refer to the filters manual.

After adding the filters, you're done and you can hit save. Users that are added to be used as a key contact will not receive a notification about this. They do not need access to front-end or back-end, so no email is sent. A user that is set up as an administrator, however, will receive an email invitation asking them to activate their account so they can access the back-end. This administrator can then use the same credentials (so his or her email address and the password he or she chooses) to log into the front-end too.

You now know how to add key contacts and administrators to the application. So, let's go and get your app ready for all new hires to come!