

Administration of your Account Create a New User

How to create a new user in the new platform



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Administration of your Account – Create a New User

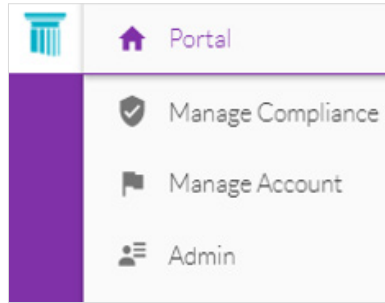
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Administration of your Account

Admin

The “Admin” area is where you can create new users, delete users and assign users to a user group.

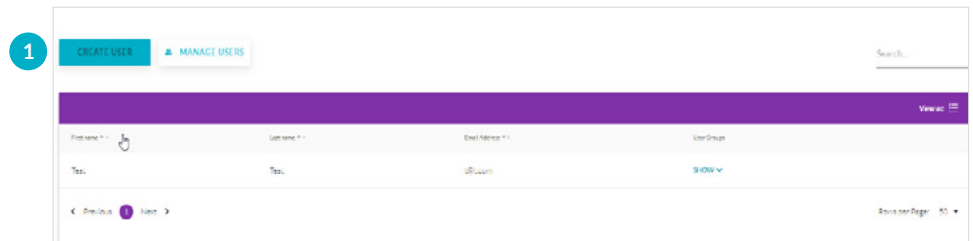
Once logged in, please select “Admin” on the left-hand navigation, and then select ‘Continue’ on the overview page.



Create a New User

You can only add a new user to your account if you have permission to administrate.

1 Select “Create User”



Add a “First” and “Last Name” for the user you want to add.

Add a valid email address > the user will be sent an email to validate their email address with a verification code.

A screenshot of a web application's 'Create user' form. The form is titled 'Create user' and has a subtitle 'This will create a user within 4Principles Construction Ltd'. There are three input fields: '1 First Name', '2 Surname', and '3 Email address'. Each field is preceded by a red square containing a white number (1, 2, or 3). The form is set against a light blue background.

Administration of your Account

Assign the user permissions, your users can have access to. This can be all three, two or one of the apps, and this is in your control. (The user permissions for each app are explained in more detail below).

Once you have selected your permissions, select 'Create', the user will receive an email to set their password.

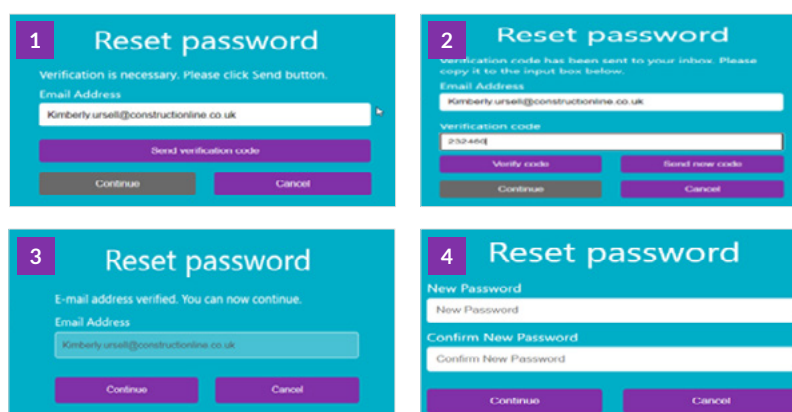
Assign to user groups:
This will assign what level of access users will have.

- Manage Compliance **1**
- Administrator **2**
- zzSubscriptions group for the Subscriptions app **3**

CREATE

- 1. Manage Compliance:** Within Manage Compliance, the user will be able to complete, update and submit the requirements needed to become verified.
- 2. Administrator:** Within Admin, the user will be able to create a new user, change their user's permissions and manage the company's membership products, invoices and billing contact information.
- 3. Subscriptions Group:** Within Subscriptions, the user will be managing the company's membership products, invoices and billing contact information.

Setting up a New User's Password



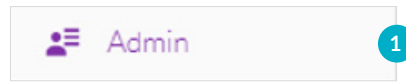
- Add your email address
- Select send verification code
- Check email for code (check your junk box if it does appear)
- Add code and click verify code
- Click continue
- Add password

Administration of your Account

1 Admin

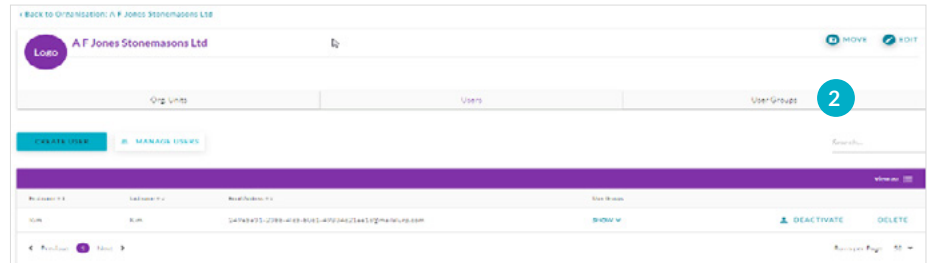
Change Permissions of an Existing User

Click on **“Admin”**.



From this screen click on **‘User Groups’**.

2 User Groups



From this screen you will see the system permissions available, click on **‘Manage Users,’** next to the group you want to change.

3 Manage Users



4 Manage Users

5 Confirm

