

# Buyer Portal – Admin

---

How to manage your account in Admin



Organisation Units.....3

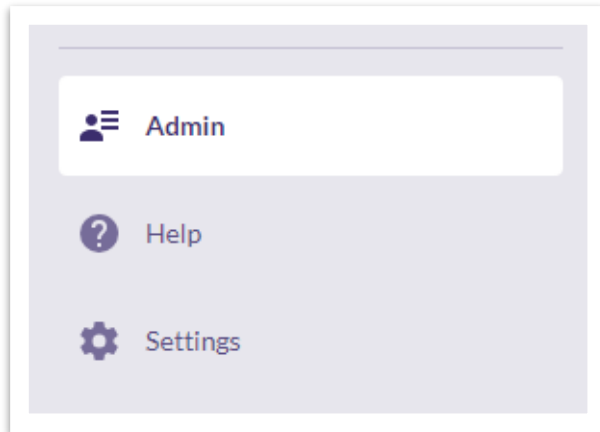
Users.....7

Manage Permissions.....10

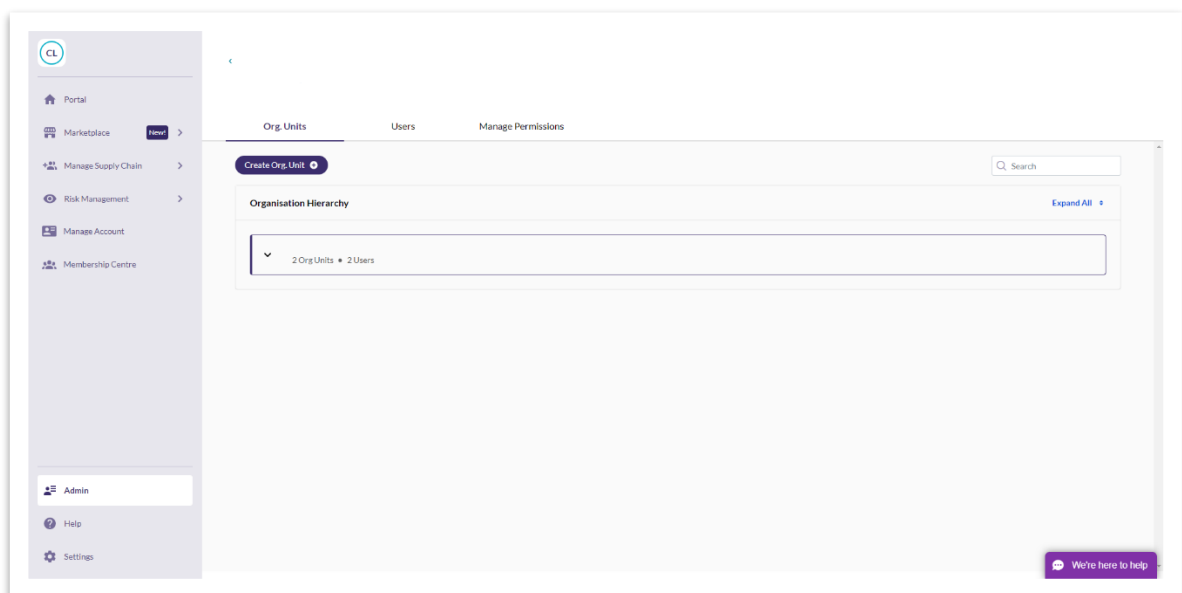
## Organisation Units

Organisation Units is how you divide up your users for specific projects and divisions. You will need to have the Organisation Admin permission to access these settings.

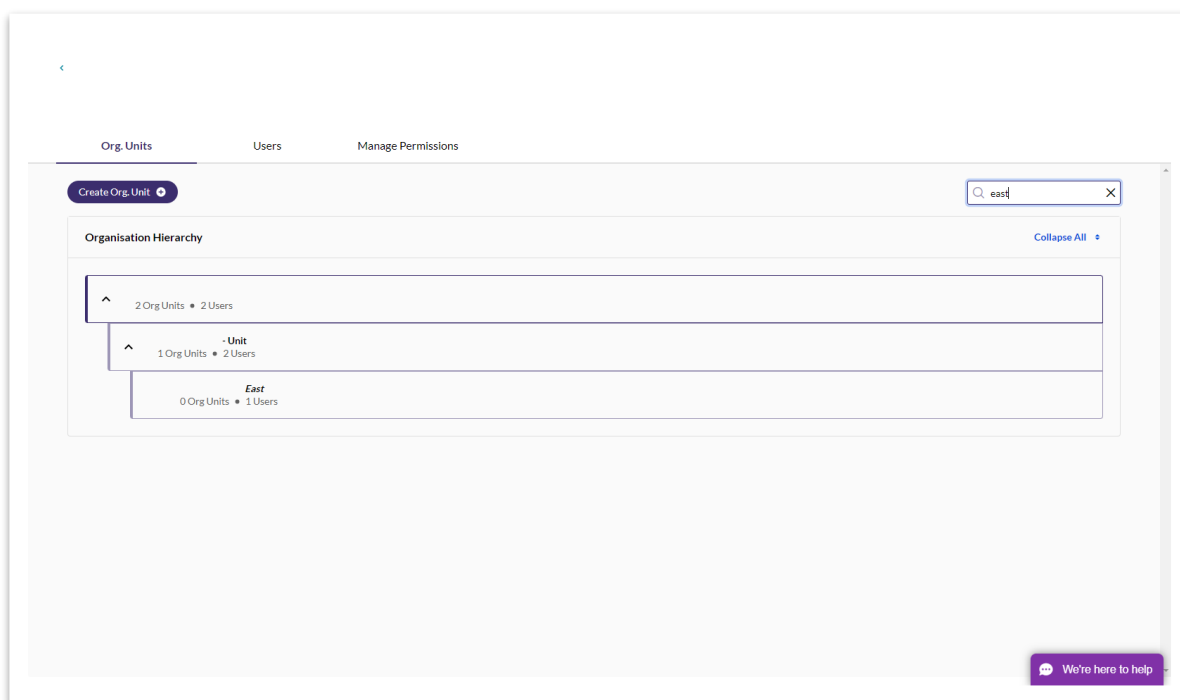
1. From the portal menu, you will need to click **“Admin”** on the left.



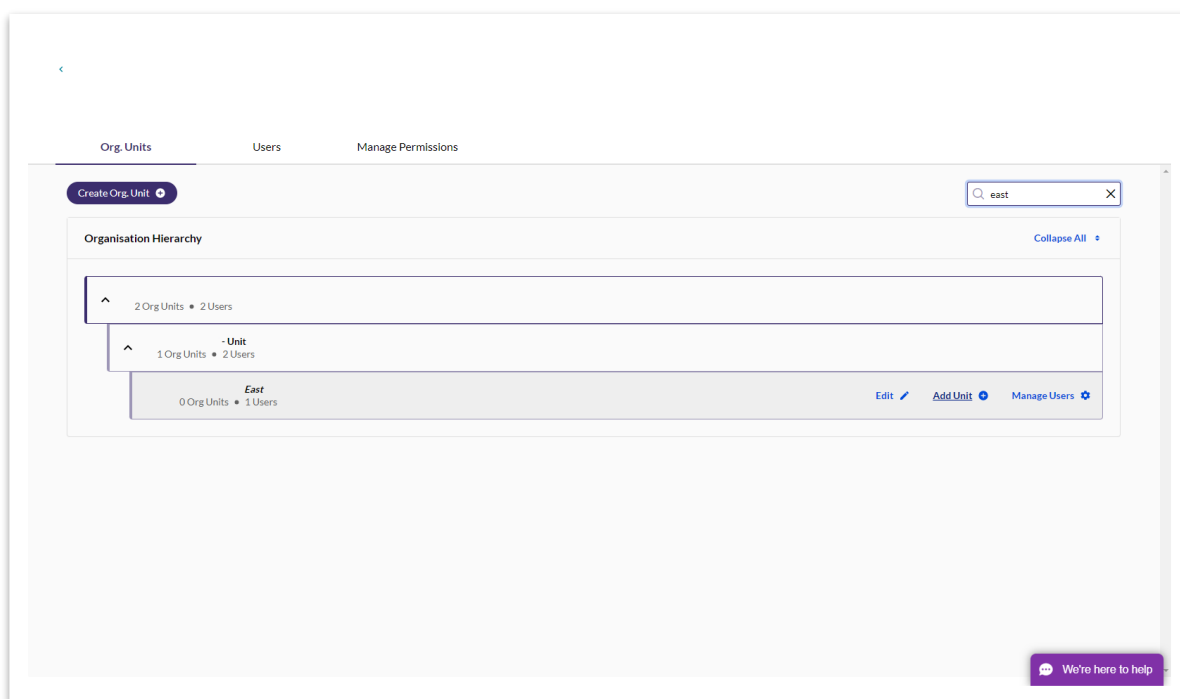
2. The first page you will see is **“Organisation Units”**. Here you can see how the organisation is divided. By default, every account on the platform will have one organisation unit.



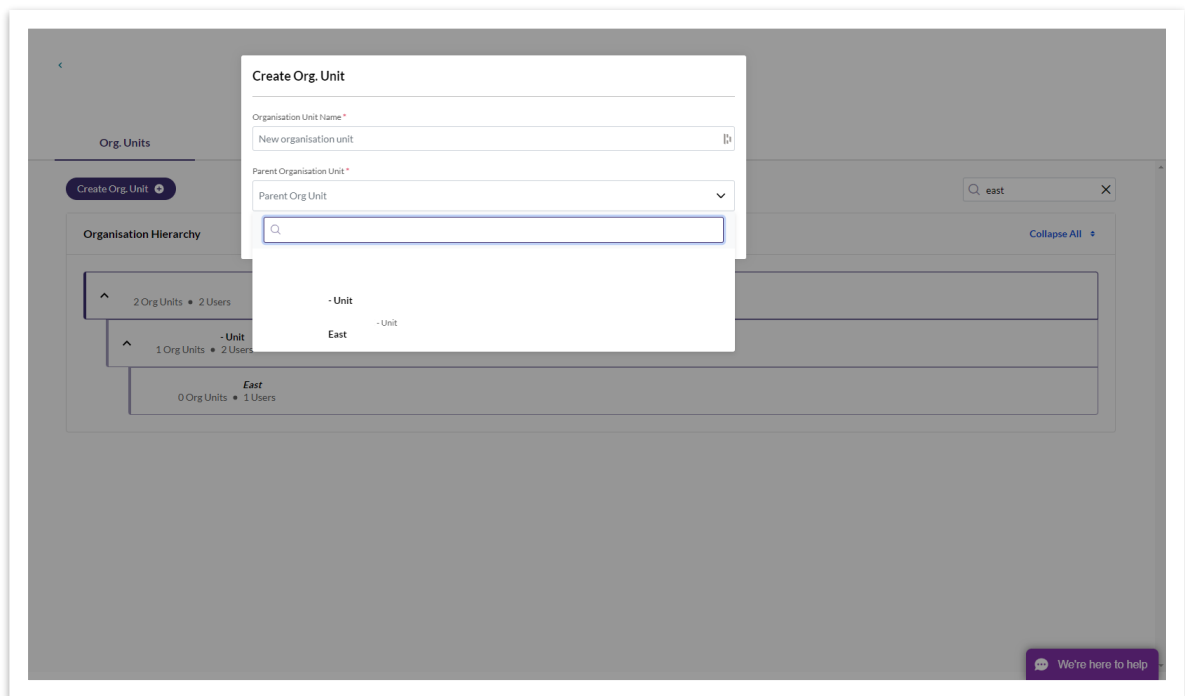
3. The “**Organisation Hierarchy**” shows all units within the organisation and which parent unit they fall under. You can use the search to quickly find a specific unit without having to sort through the hierarchy.



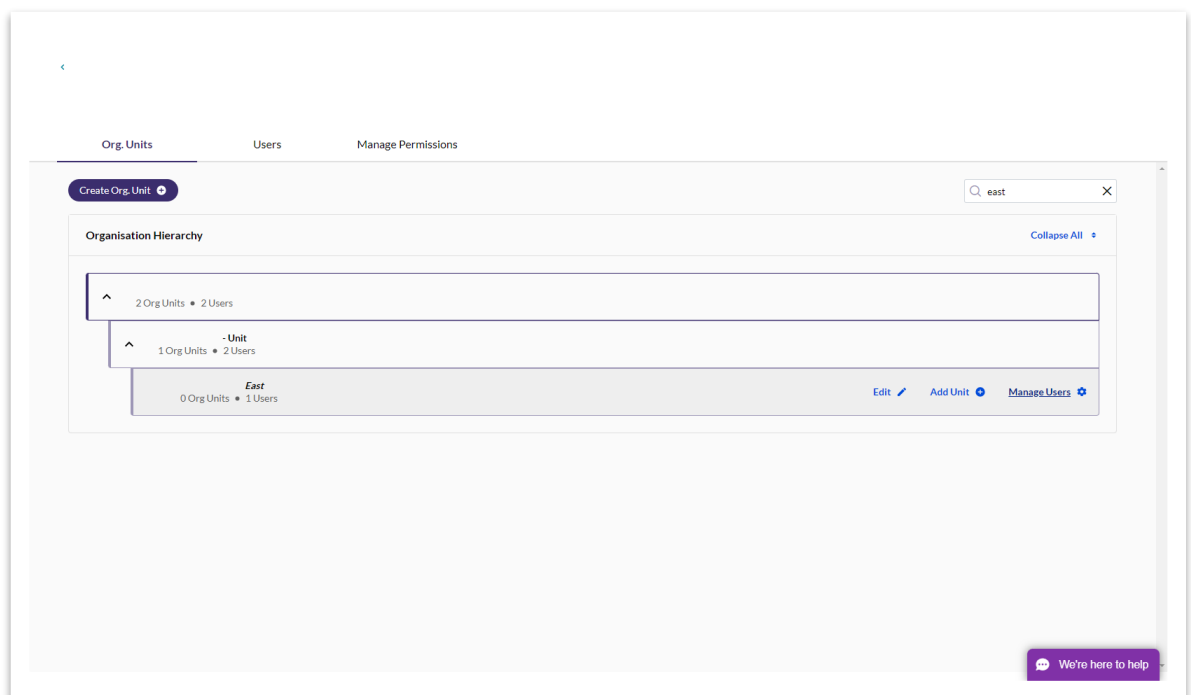
4. To create a new unit, click “**Create Org. Unit**” at the top, or “**Add Unit**” when hovering over a unit.



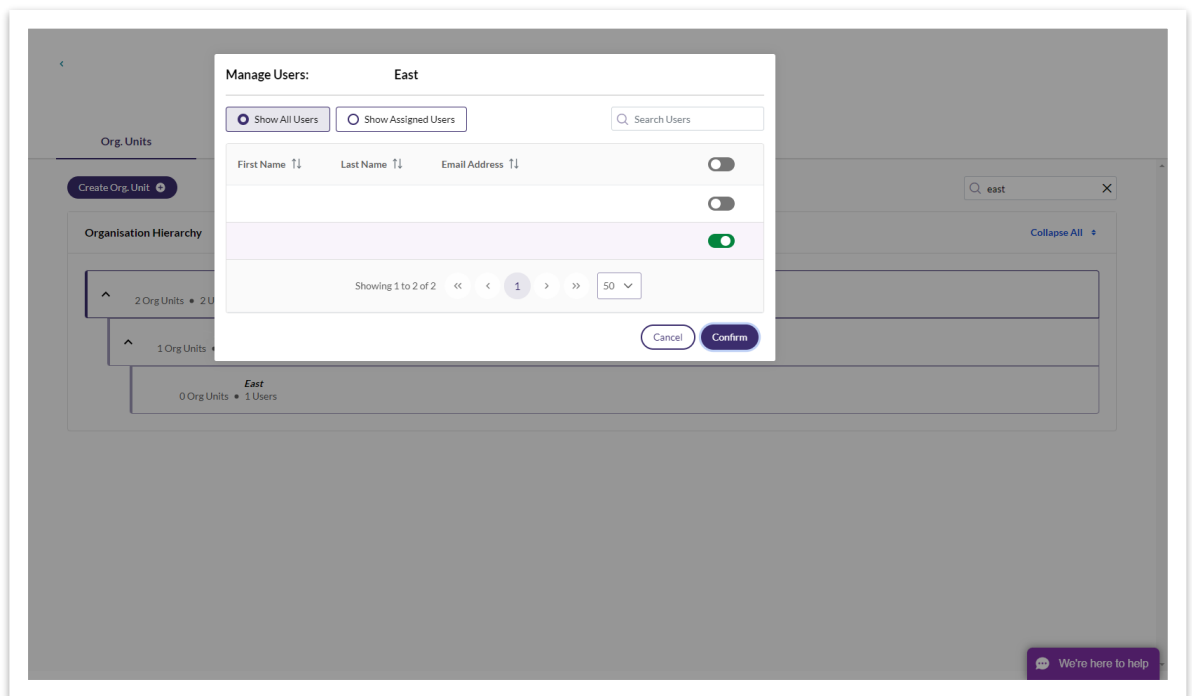
5. Now enter the unit name, and where in the hierarchy this unit falls – if it is under a different unit, select this from the list.



6. After you have created the new unit, you can add users into it with “**Manage Users**”.

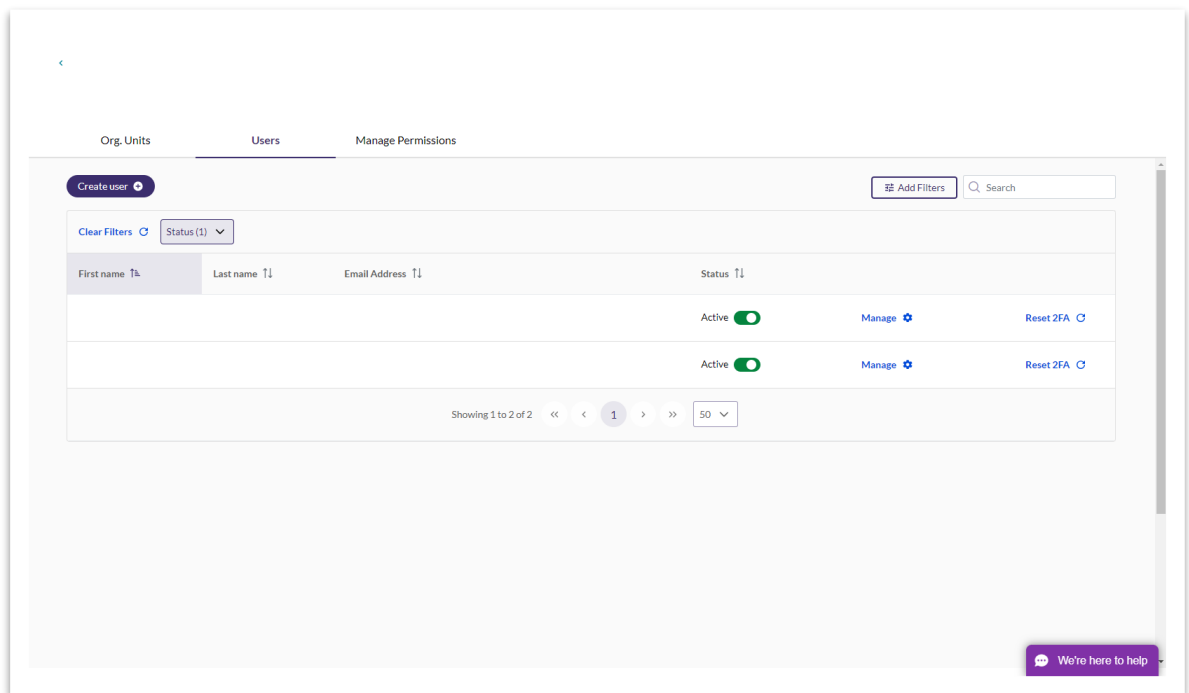


7. Add multiple users by clicking the toggle on – you can use the search bar to find users quickly too.

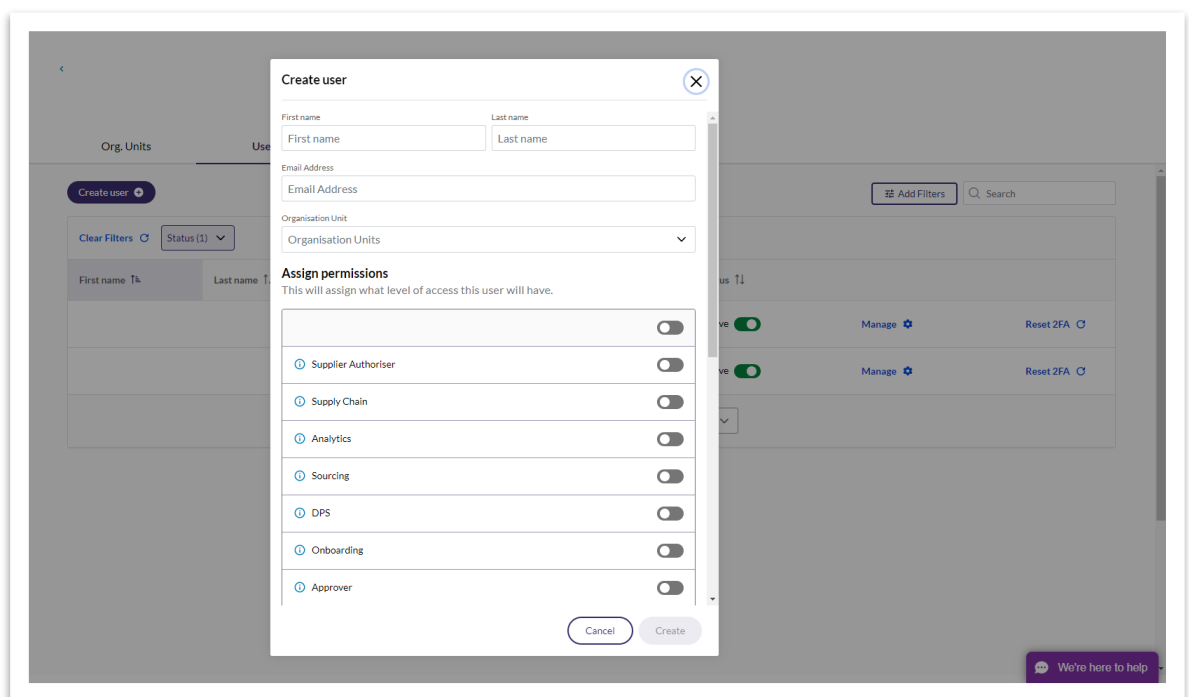


# Users

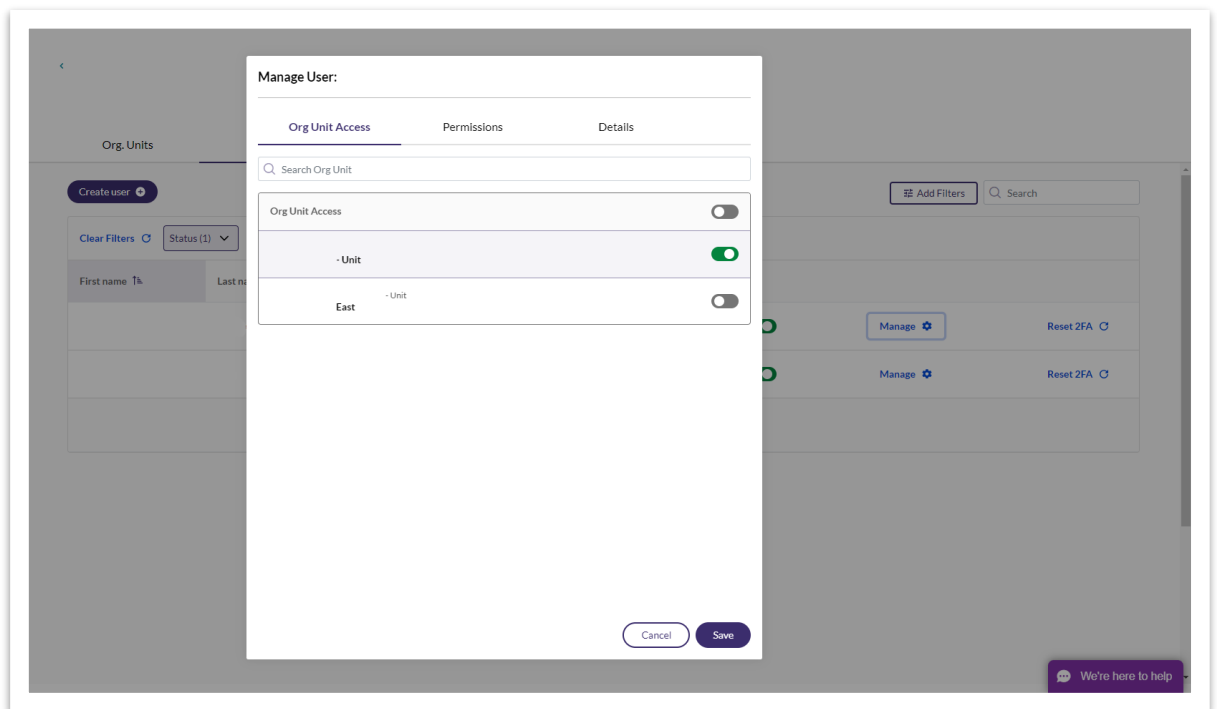
1. To create a new user, click **“Create user”** on the left side of the screen.



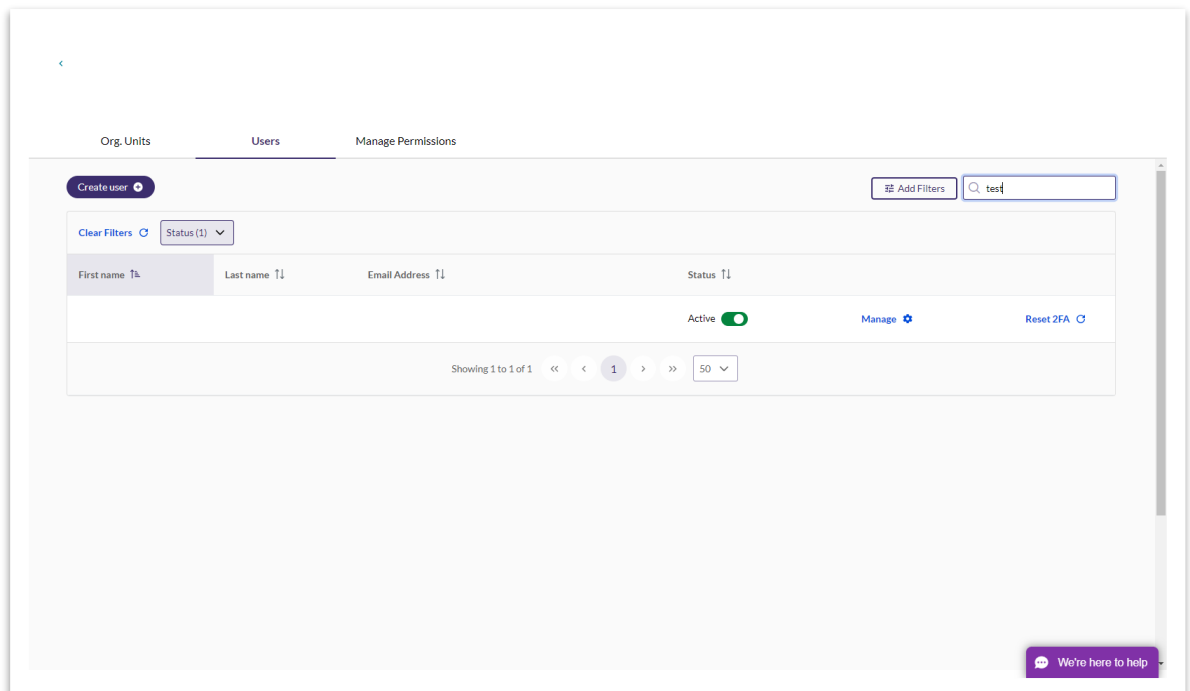
2. Enter the name, which organisation unit they fall under, and assign the permissions. You can assign the user to more than one unit. You can also see a description of the permission using the icon on the left.



3. If you click **“Manage”**, you will be able to amend the organisation unit access, permissions and name of the user.



4. To find a user quickly, use the search bar. The search is fuzzy, meaning if you spell the name incorrectly, it will still appear in the list.



5. Click “Add Filters” to filter the list of users to show only those active or not, and users that have specific permissions.

The screenshot displays a user management interface. At the top, there are three tabs: "Org. Units", "Users", and "Manage Permissions". The "Users" tab is selected. Below the tabs, there is a "Create user" button and a "Clear Filters" button. A dropdown menu shows "Status (1)". The main table has columns for "First name", "Last name", "Email Address", and "Status". Two rows are visible, both with the "Active" status toggle turned on. At the bottom of the table, it says "Showing 1 to 2 of 2" with pagination controls. On the right side, there is a "Filters" sidebar. It has two sections: "Status" and "Permissions". In the "Status" section, the "Active" checkbox is checked. In the "Permissions" section, there is a list of permissions with checkboxes, including "Supplier Authoriser", "Supply Chain", "Analytics", "Sourcing", "DPS", "Onboarding", "Approver", "Marketplace Find", "Marketplace Publish", "Marketplace Track", "The Builders Conference", "Buyer", "Supplier", "Organisation Administrator", "Organisation Unit Administrator", "Subscriptions", "Buyer DPS Viewers", and "Full Access Marketplace Centre". A "Clear Filters" button is at the bottom of the sidebar.

First name	Last name	Email Address	Status
			Active
			Active

Showing 1 to 2 of 2

Filters

^ Status

☒ Active

☐ Not Active

^ Permissions

☐ Supplier Authoriser

☐ Supply Chain

☐ Analytics

☐ Sourcing

☐ DPS

☐ Onboarding

☐ Approver

☐ Marketplace Find

☐ Marketplace Publish

☐ Marketplace Track

☐ The Builders Conference

☐ Buyer

☐ Supplier

☐ Organisation Administrator

☐ Organisation Unit Administrator

☐ Subscriptions

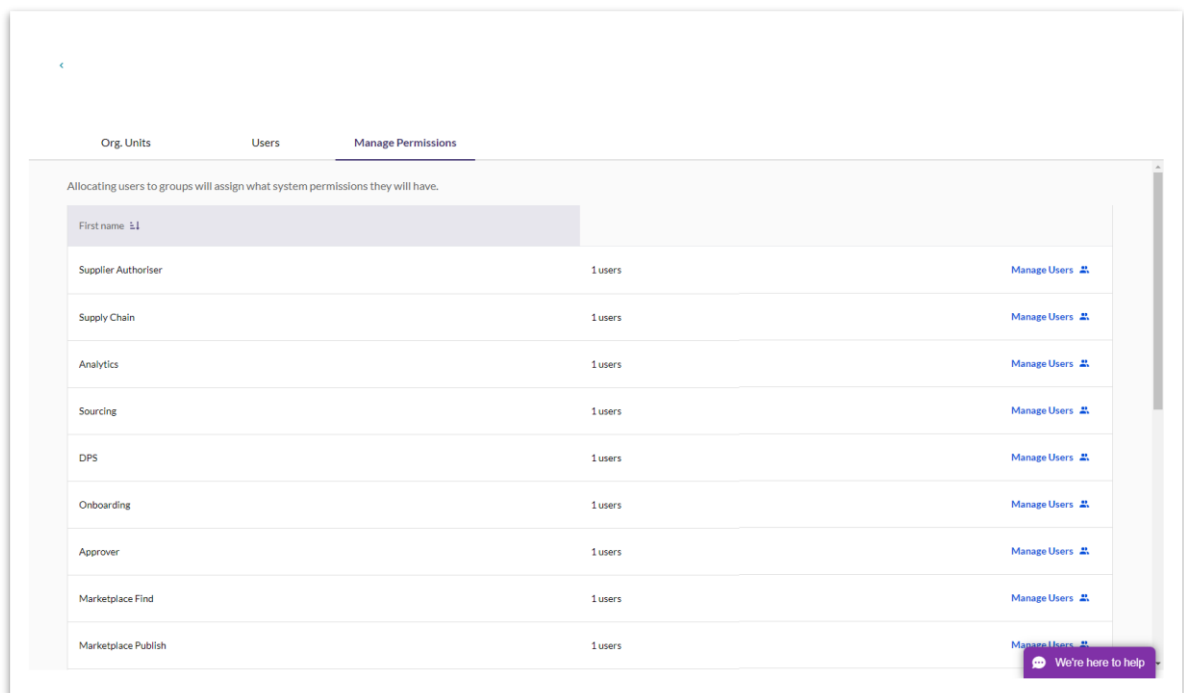
☐ Buyer DPS Viewers

☐ Full Access Marketplace Centre

Clear Filters

# Manage Permissions

1. To manage your users and amend permissions, click **“Manage Permissions”**.



2. Click **“Manage Users”**, to add or remove users from the permissions group. You can also search for a user to find a specific user quickly.

