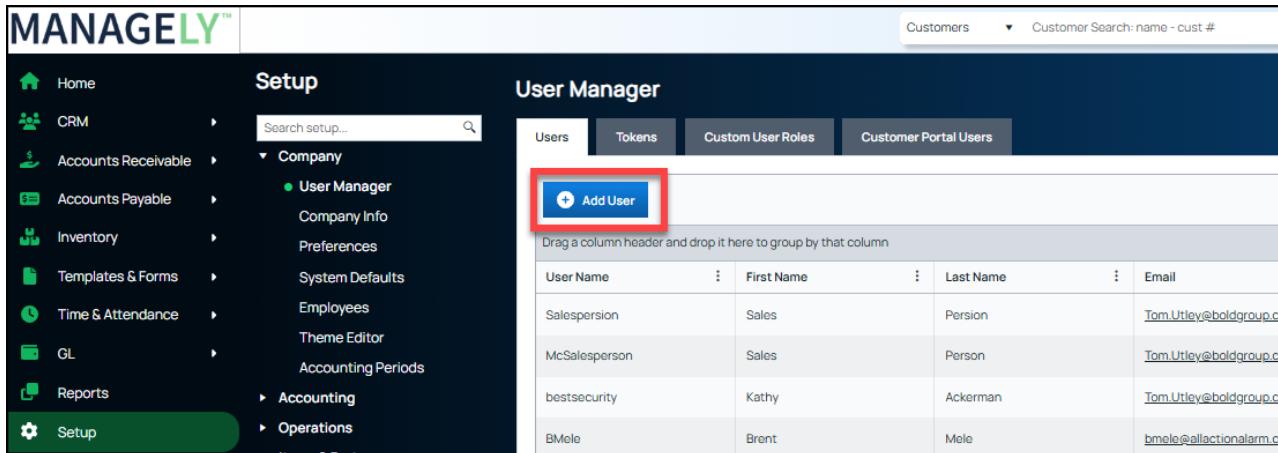


Add a User

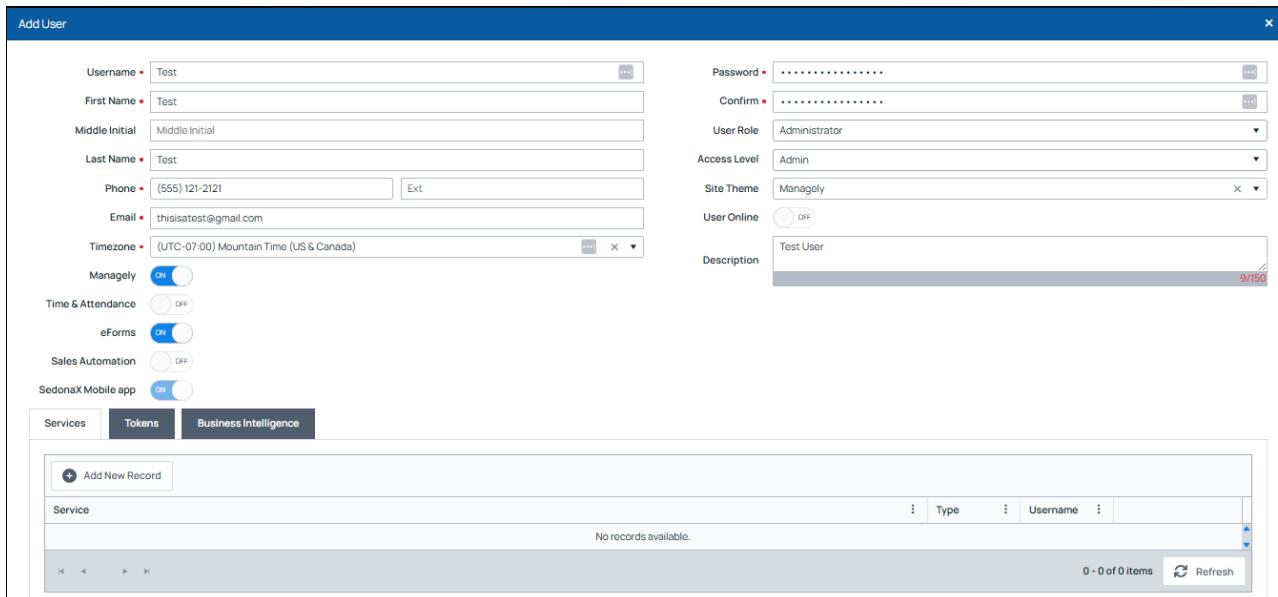
Last Modified on 01/08/2026 11:46 am EST

1. From the main menu, browse to Setup > Company > User Manager.
2. The User Manager list opens. Click the **Add User** button at the upper left of the page.



The screenshot shows the MANAGELY application interface. On the left is a navigation sidebar with various modules like Home, CRM, Accounts Receivable, etc. Under the 'Setup' section, 'User Manager' is selected. The main area is titled 'User Manager' and shows a table of existing users with columns for User Name, First Name, Last Name, and Email. At the top right of the user list is a blue 'Add User' button, which is highlighted with a red box. The top right corner also shows 'Customer Search: name - cust #'. The overall layout is clean with a dark header and light body.

3. The Add User Account form is displayed. Each data entry field is described below.
4. When finished filling in the form, click the **Save** button at the bottom of the form. Definitions of each section are below.
5. After saving the user and opening it in edit mode, you can see the permissions assigned based on the Role Group selected for the user.



The screenshot shows the 'Add User' form. The 'Tokens' tab is active. The form contains fields for basic user information (Username, First Name, Middle Initial, Last Name, Phone, Email, Timezone, etc.) and various service toggles (Managely, Time & Attendance, eForms, Sales Automation, SedonaX Mobile app). On the right side, there are fields for Password, Confirm, User Role (Administrator), Access Level (Admin), Site Theme (Managely), User Online (OFF), and a Description field (Test User). Below the form is a table showing 'Service' records with a 'No records available.' message. The bottom right corner shows '0 - 0 of 0 items' and a 'Refresh' button.

Data entry fields preceded by an asterisk are required.

- ***Username:** Enter the code the user will enter when logging into the application. Maximum of 60 characters allowed.
- ***First Name:** Enter the first name of the user. Maximum of 60 characters allowed.
- **Middle Initial:** Enter the middle initial of the user. Maximum of 1 character allowed.
- ***Last Name:** Enter the last name of the user. Maximum of 60 characters allowed.
- ***Phone:** Enter the phone number of the user. Maximum of 10 numeric characters allowed.
- **Ext:** If there is an extension number for the phone, enter it here. Maximum of 10 numeric characters allowed.

- ***Email:** Enter the email address for the user.
- ***Timezone:** From the drop-down list, select the time zone for the user.
- ***Password:** Enter a password the user will use when logging into the Managely application. Minimum of 8 characters. Must contain at least one of each of these: a lowercase letter, an uppercase letter, a number, and a special character.
- **Confirm:** Re-type the password to confirm.
- **User Role:** Select from the drop-down list.
- **Access Level:** Select Admin, Internal, Customer.
- ***Site Theme:** From the drop-down list, select the site theme for the user.
- **User Online:** When viewing the list of Users in setup, if you want to know whether the user is currently logged into Managely, set the toggle button to On.
- **Description:** Typically, a user's job description or other important information is entered into this field. Maximum of 150 characters allowed.
- **Managely:** If the user is to have access to the Managely application, set the toggle button to On.
- **Time & Attendance:** If the user is to have access to Time & Attendance, set the toggle button to On.
- **eForms:** If the user is to have access to the eForms application, set the toggle button to On.
- **Mobile app:** If the user is to have access to the SedonaX mobile application, set the toggle button to On.
