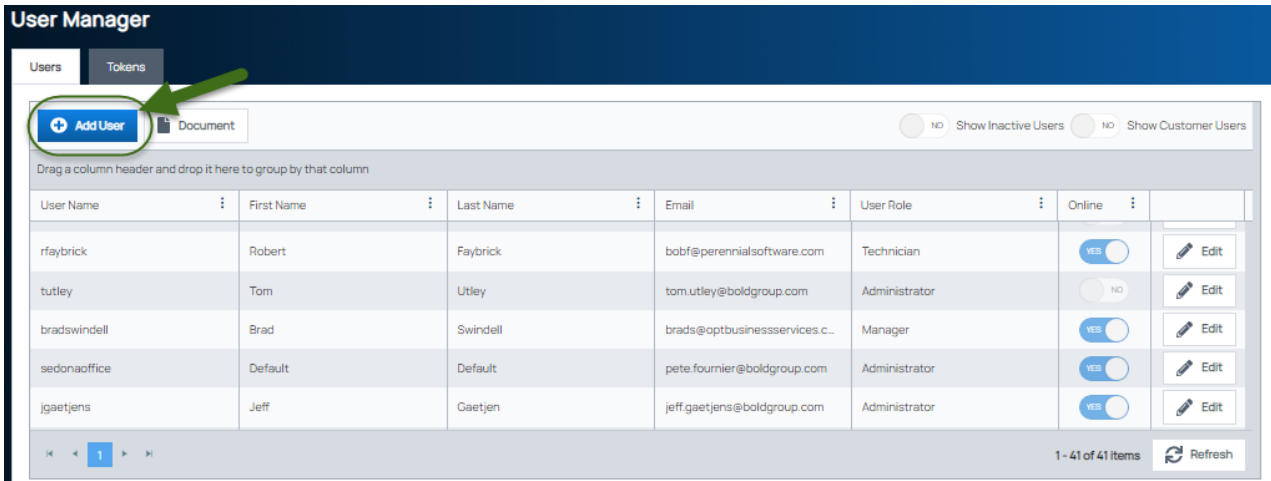


Add a User

Last Modified on 01/15/2025 10:23 am EST

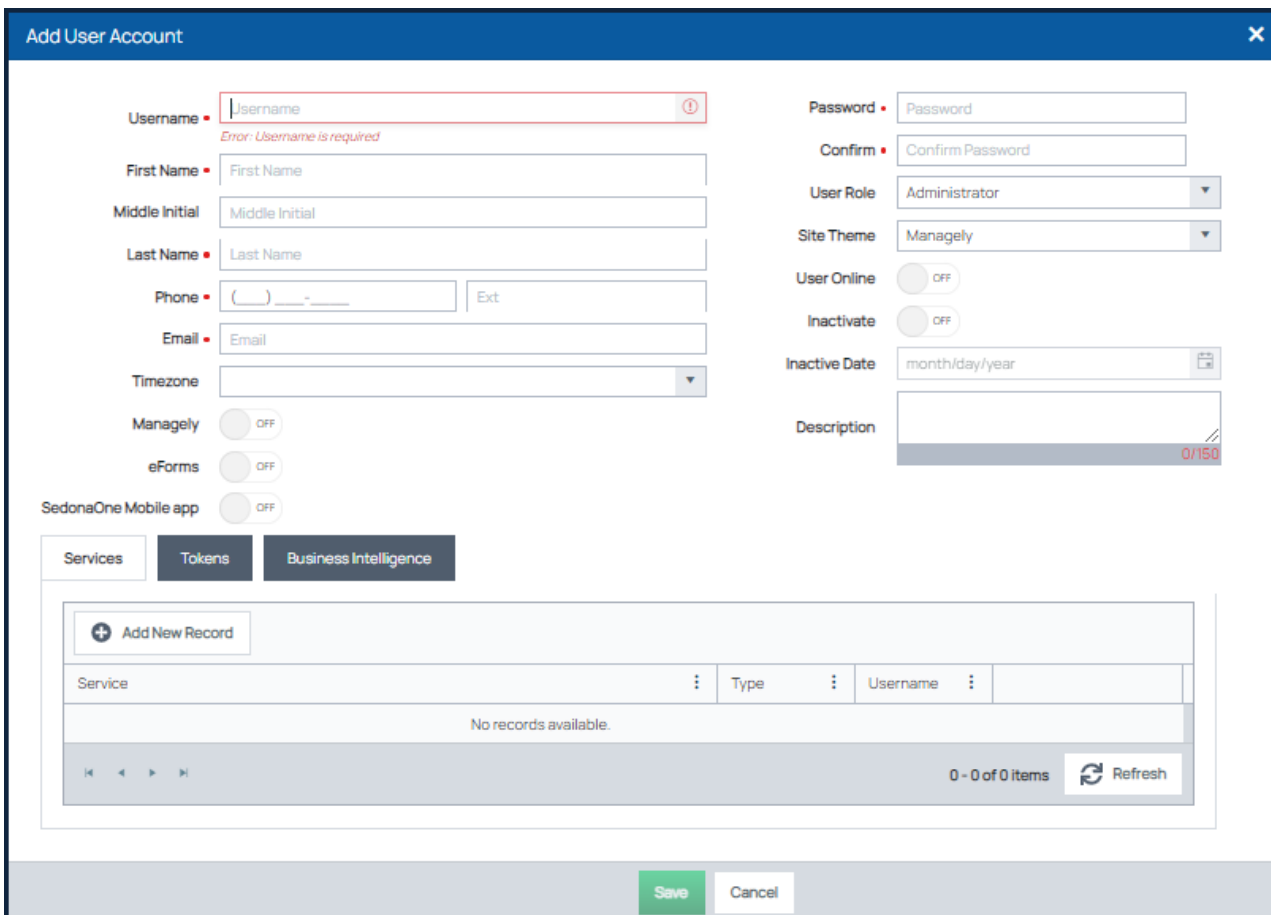
From the main menu, browse to Setup > Company > User Manager.

The Users list is displayed. Click on the Add User button at the upper left of the page.



The Add User Account form is displayed. Each data entry field is described below. When finished filling in the form, click the **Save** button at the bottom of the form.

After saving the user and opening in edit mode, you can see the permissions assigned based on the Role Group selected for the user.



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.
 - ***Last Name:** Enter the code the user will enter when logging into the application. Maximum of 60 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.
 - ***User Role:** From the drop-down list, select the role for the user.
 - **Managely:** If the user is to have access to the Managely application, 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.
 - ***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.
 - ***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.
 - **Inactive:** If a user will no longer have access to the Managely application, set the toggle button to On.
 - ***Inactive Date:** If the Inactive toggle button is set to On, you must enter an inactive date.
 - **Description:** Typically, a user's job description or other important information is entered into this field. Maximum of 150 characters allowed.
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