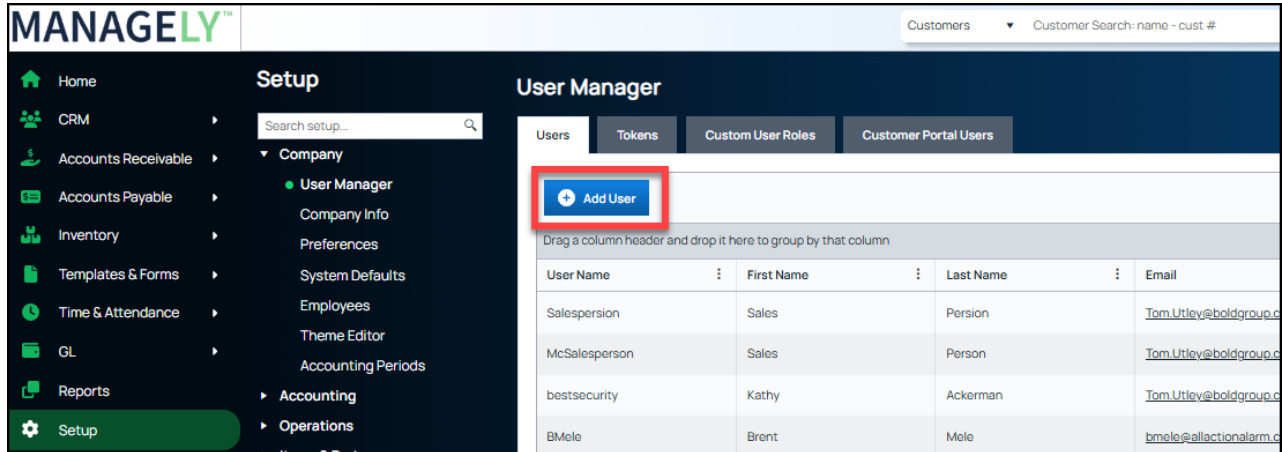


# Add a User

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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.



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. It has two main sections. The left section contains fields for Username (\*), First Name (\*), Middle Initial, Last Name (\*), Phone (\*), Ext, Email (\*), and Timezone. Below these are toggle switches for Managely, Time & Attendance, eForms, Sales Automation, and SedonaX Mobile app. The right section contains fields for Password (\*), Confirm (\*), User Role (dropdown), Access Level (dropdown), Site Theme (dropdown), User Online (radio buttons), and Description. At the bottom, there are tabs for Services, Tokens, and Business Intelligence. Below the tabs is a table with columns for Service, Type, and Username, and a 'No records available.' message. A 'Refresh' button is at the bottom right.

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.
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