



Inviting User (Whitelabel Administrator)

Santiago Garcia - 2024-08-21 - Whitelabels

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As an administrator, you will create and configure multiple accounts for your customers. However, it's essential that your customers have the ability to manage their own accounts. This guide will walk you through the process of inviting new users to your customers' accounts.

To invite new users please follow the next process:

- Log into your account.
- Go to your customers > Choose the account you want to invite the users.
- Profile > Contact Information
- Create New Users

The screenshot shows a user management interface. At the top, there are navigation tabs: Profile, Plan, Billing, Switchboard, e911, Tools, and Users. Below these are three main sections: Account Overview, Contact Information, and History and Notes. The 'Account Contact Details' section on the left shows fields for Company (Santiago's S), Main number (5545454), First name (Santiago), and Last name (Garcia). The 'User Profiles' section on the right contains a table with columns for NAME, EMAIL, CONTACT NUMBER, TYPE, NUMBERS, STATUS, and ACTIONS. The table lists two users: Santiago Garcia (Account Administrator) and another Santiago Garcia (Account Administrator). A red circle with the number '1' and an arrow points to the 'CREATE NEW USERS' button in the top right corner of the 'User Profiles' section.

NAME	EMAIL	CONTACT NUMBER	TYPE	NUMBERS	STATUS	ACTIONS
Santiago Garcia		5545454	Account Administrator		<input checked="" type="checkbox"/>	
Santiago Garcia			Account Administrator		<input checked="" type="checkbox"/>	

You will be redirected to a new tab where you can enter the email addresses of the users you wish to invite.

The screenshot shows a progress bar with two steps: '1 Email Addresses' (highlighted) and '2 Accounts' (dimmed). Below the progress bar, there is a text input field with the label 'Enter one or more emails:'. The input field contains two email addresses: 'test@testa1.com' and 'test@testa2.com'. At the bottom right, there are 'CANCEL' and 'NEXT' buttons.

- On the "Accounts" screen, you will have the option to invite the user as either an Administrator or a Standard User. You will be able to assign a number for this new user as well.

The screenshot shows a web interface for managing accounts. At the top, there are two breadcrumb items: '1 Email Addresses' and '2 Accounts'. Below this, the interface is divided into three columns: 'USERS', 'ACCESS TYPE', and 'NUMBERS'. The 'USERS' column has a 'BACK' button. The 'ACCESS TYPE' column has a dropdown menu currently showing 'Standard User', with a list of options below it: 'Select a role', 'Account Administrator', and 'Standard User'. The 'NUMBERS' column has a search input field with the placeholder text 'Search for number' and a trash icon to its right. At the bottom right of the form, there are two buttons: 'CANCEL' and 'SUBMIT'.

- Submit!

The user you invited will receive the invitation in the email(s) assigned.