Adding Existing Users (Whitelabel Administrator)

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After creating a new customer, you may wish to add existing users from your white label to this account. This scenario is often applicable when adding an IT person responsible for managing multiple accounts under a personalized configuration.

Please follow these steps:

1. Log in
2. Select the initials logo of your profile > **Your Team**
3. Look for the user you need > Open the edit options
4. Add +

5. Select the role you want to assign to this user.

6. Search for the customer (You can look it up by name or account number)

7. Add User

The user has been successfully added to the selected customer's account!