



## Inviting User (Whitelabel Administrator)

Santiago Garcia - 2024-08-21 - Whitelabels

# Inviting User (Whitelabel Administrator)

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 dashboard for account management. 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 box highlights the 'CREATE NEW USERS' button in the top right corner of the 'User Profiles' section, with a red circle containing the number '1' and an arrow pointing to it.

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 at the top 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 two buttons: 'CANCEL' and 'NEXT'.

- 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 displays the 'Accounts' configuration page. At the top, there are two breadcrumb items: '1 Email Addresses' and '2 Accounts'. Below this, the page is divided into three columns: 'USERS', 'ACCESS TYPE', and 'NUMBERS'. The 'USERS' column contains a 'BACK' button. The 'ACCESS TYPE' column features a dropdown menu currently set to 'Standard User', with a list of options including 'Select a role', 'Account Administrator', and 'Standard User'. The 'NUMBERS' column has a search input field labeled 'Search for number' and a trash icon. At the bottom right, there are 'CANCEL' and 'SUBMIT' buttons.

- Submit!

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