



## 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 dashboard with a navigation bar at the top containing 'Profile', 'Plan', 'Billing', 'Switchboard', 'e911', 'Tools', and 'Users'. Below the navigation bar 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' (selected) and '2' (unselected). Below the progress bar, there is a text input field with the placeholder '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 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 with 'Standard User' selected, and a list of options: '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. At the bottom right, there are 'CANCEL' and 'SUBMIT' buttons.

- Submit!

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