



## 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 the 'Profile' tab of an account management system. The 'Contact Information' section is active, displaying details for 'Santiago's 5'. The 'User Profiles' table lists two administrators. A red box highlights the 'CREATE NEW USERS' button in the top right corner of the 'User Profiles' section, with a red arrow pointing to a '1' in a red circle above it.

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 the 'Email Addresses' step of the user invitation process. A progress bar at the top indicates the current step. The input field contains two email addresses: 'test@testa1.com' and 'test@testa2.com'. 'CANCEL' and 'NEXT' buttons are visible at the bottom right.

- 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.