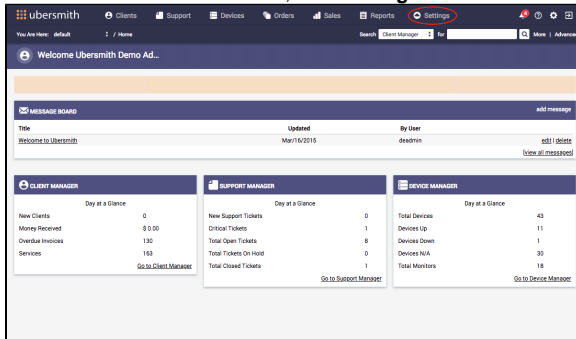


Adding Users

The Users section of *Settings* grants system access. You can control what parts of the system each user can access, such as support, but not billing/invoicing. You can also unlock accounts.

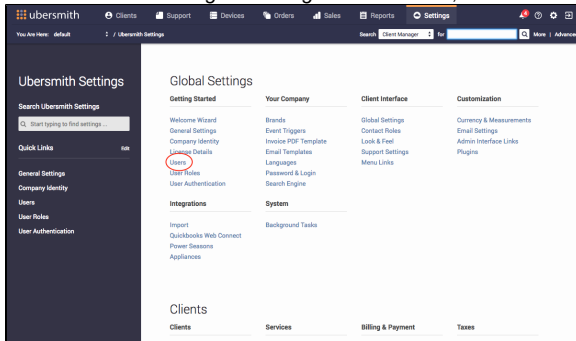
Access the Users Page

1. From the *Ubersmith Dashboard*, click **Settings**.



The *Ubersmith Settings* page appears.

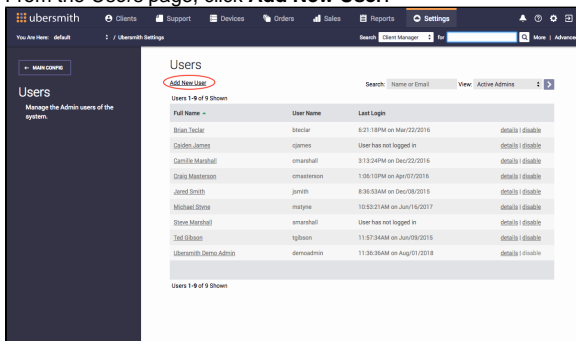
2. From the *Global Settings – Getting Started* section, click **Users**.



The *Users* page appears.

Complete the Add New User Page

- From the *Users* page, click **Add New User**.



The *Add New User* page appears.

Complete the User Info Tab

1. In the **Full Name** field, enter your user's first and last name.
2. In the **Email** field, enter your user's email address.
3. In the **Authentication** field, select the method of user authentication to use during logging in. This field displays when you have [added an authentication module](#).
4. In the **Two-Factor Module** field, select None to disable two-factor authentication or select the two-factor authentication application to be used. This field displays when you have [added a two-factor module](#).
5. In the **Preferred Language** field, select the user's preferred language.
6. In the **API Access** field, select **Allow** to give the user access to Ubersmith's API or Deny.

On this page:

On this page:

- [Access the Users Page](#)
- [Complete the Add New User Page](#)
 - [Complete the User Info Tab](#)
 - [Complete the Login & Password Tab](#)
 - [Complete the Brand Access Tab](#)
 - [Assign User Roles](#)
 - [Assign User Permissions](#)
- [Related Topics](#)

7. In the **Facility** field, select a facility that the user should be assigned to.

The screenshot shows the 'Add New User' form in the Ubersmith application. The 'User Info' tab is selected. The form contains the following fields and values:

- Full Name: Rose James
- Email: rjames@marshallshosting.com
- Authentication: Ubersmith Authentication
- Two-Factor Module: None
- Preferred Language: English(USA)
- API Access: Deny
- Facility: None

At the bottom right, there are 'Next' and 'Cancel' buttons.

Complete the Login & Password Tab

1. Click the *Login & Password* tab.
2. In the **Username** field, enter the user's user name.
3. In the **Password** field, enter the user's password, or click auto generate to have the password generated by Ubersmith.
4. In the **Confirm Password** field, enter the same password. This field automatically populates if you selected auto generate.
5. Select **Notify user of new account**, if you want to send an account creation email to the user.

The screenshot shows the 'Add New User' form in the Ubersmith application, with the 'Login & Password' tab selected and circled in red. The form contains the following fields and values:

- Username: rjames
- Password: [masked] (with an 'auto generate' button next to it)
- Confirm Password: [masked]
- Notify user of new account: ☒

At the bottom right, there are 'Next' and 'Cancel' buttons.

Complete the Brand Access Tab

1. Click the *Brand Access* tab.
2. In the **Full Brand Access** field, select **Yes** to give the user access to all brands.
3. In the *Brand Access* section, select each brand you want to give the user access to. If you selected full brand access, all brands are automatically selected.

4. Click **Next**.

The screenshot shows the 'Add New User' form in the Ubersmith application. The form has three tabs: 'User Info', 'Login & Password', and 'Brand Access'. The 'Brand Access' tab is selected and highlighted with a red circle. Below the tabs, there is a section for 'Full Brand Access?' with radio buttons for 'Yes' (selected) and 'No'. Below this is a table with two columns: 'Brand' and 'Access?'. The table has three rows: 'default:', 'Super Brand:', and 'Sys Admins for Hire:'. Each row has a checkbox in the 'Access?' column, all of which are checked. At the bottom right of the form, there are 'Next' and 'Cancel' buttons, with the 'Next' button highlighted by a red circle.

Brand	Access?
default:	<input checked="" type="checkbox"/>
Super Brand:	<input checked="" type="checkbox"/>
Sys Admins for Hire:	<input checked="" type="checkbox"/>

The *User Roles* page appears.

Assign User Roles

1. On the *User Roles* page, select one or more roles to assign to the user.
2. Click **Next**.

The screenshot shows the 'User Roles' page in the Ubersmith application. The page has a header with the Ubersmith logo and the user's name 'Rose James'. Below the header is a list of roles with checkboxes: 'Administrator', 'Operations', 'Support', 'Billing', and 'Account Manager'. The 'Account Manager' role is selected with a checked checkbox. At the bottom right of the page, there are 'Next' and 'Cancel' buttons, with the 'Next' button highlighted by a red circle.

The *User Permissions* page appears.

Assign User Permissions

The *Permissions* grid contains each distinct area in Ubersmith, such as the *Client Manager* that can be expanded to display each area's functions, such as *Services*. Permissions available for each area are view, create, update and delete. None and Inherit are system defaults that start the user with no rights.

1. On the *User Permissions* page, expand each area in the *Resources* column to access each area's functions.
2. Select the appropriate rights to assign to the user, for each area's *View*, *Create*, *Update* and *Delete* columns. **Allow** gives the user access and **Deny** gives the user no access.

3. Click **Save**.

ubersmith

User Permissions

Filter resources: 0 shows inherited value / 1 shows role permission

Resources	View	Create	Update	Delete
Admin Portal	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵
Client Manager	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵
> Client Profile	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵
> Services	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵
> Account Credits	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵
> Billing/Invoicing	[Allow] ⌵	[None] ⌵	[None] ⌵	[Allow] ⌵
> Account Management	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵
Client Comments	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵
> Client Reports	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵
Client Opportunities	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵
My Quotes	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵	[Allow] ⌵

The *User's Preferences* page appears.

Related Topics

[Adding User Roles](#)

[Managing Users](#)

[Managing User Roles](#)