



USER MANAGEMENT



Features of User Management

- Add an unlimited number of **Users** to your Click & Pledge Account.
- Create multiple **User Profiles** to allow users access and editing rights only to the areas of the account necessary.
- Account Administrators can edit and disable users as needed.



Tutorial of User Management

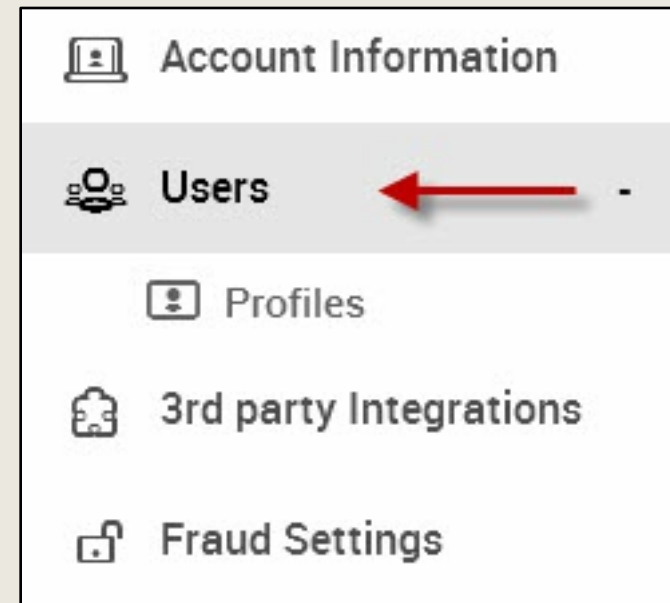
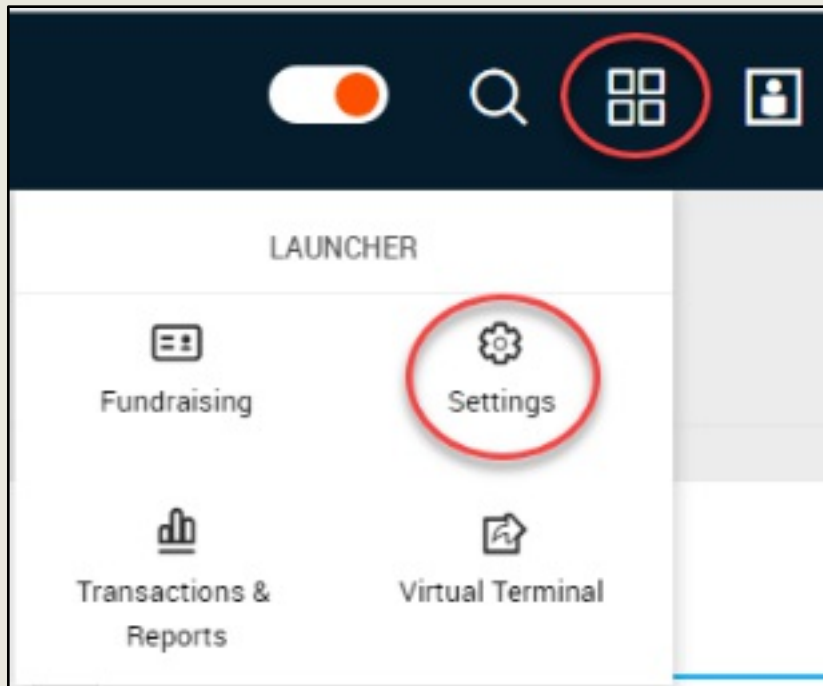
This tutorial will:

1. Show How to Navigate to User Management
2. Explain User Profiles
3. Discuss Creating and Managing Users



Navigate to the User Settings

1. At top right corner click **Launcher**
2. Click **Settings**
3. From menu on left click **Users**





User Profiles

TIP: Before creating new users review the **User Profile** options.

User Profiles Overview

With **User Profiles** you may create an unlimited number of **Profiles** with different account permission levels. So when you create a new user, you assign that person the appropriate **User Profile**.

By default an **Admin (System Profile)** is available. The **Admin User Profile** has access and editing rights to all areas of the Click & Pledge account.



To Create User Profile

1. Enter Profile Name
2. Choose Permissions for this Profile
3. Click SAVE button

New Profile

Profile Name * : 1. Enter Profile Name SAVE CANCEL 3. Click **SAVE** button

Status : Disabling a profile will disable all users assigned to the profile

Permissions

Main 2. Choose Permissions for New User Profile

	Add/Edit	Edit	Delete	View
Publish and Post	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Campaign	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Setting

	Add/Edit	Edit	Delete	View
Account Information	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Organization Setting	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Third Party	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



Create a User

1. In **User List** click on **New User**
2. Enter in required fields
3. Click **SAVE** button

Please Note:

- Be sure to check **Active** for user to be able to login.
- Mobile Phone not required.
- When entering Mobile Phone, choose country then enter number without international prefix.

New User

SAVE CANCEL

First Name * : First Name

Last Name * : Last Name

Profile * : SELECT

Active :

Mobile Phone Number : UNITED STATES Phone Number

Confirm Mobile Phone Number : UNITED STATES Phone Number

Email * : Email

Confirm Email * : Confirm Email

Access Start Date * : Click here...

Access Stop Date : Click here...

SAVE CANCEL



Manage Users

From **Users List** you may filter your list of users, edit and delete Users

Account Information

Users -

Profiles

3rd party Integrations

Fraud Settings

API Information

Users List

[NEW USER](#) [PROFILES](#) Filter by Status & Profile

Filter User Status: ALL Filter Profile: ALL

Name	Mobile	Email	Start Date	Expiration Date	Profile	Status	Action
John Smith		john.smith@clickandpledge.com	10/6/2016		Admin (System Profile)	Active	Click to Edit