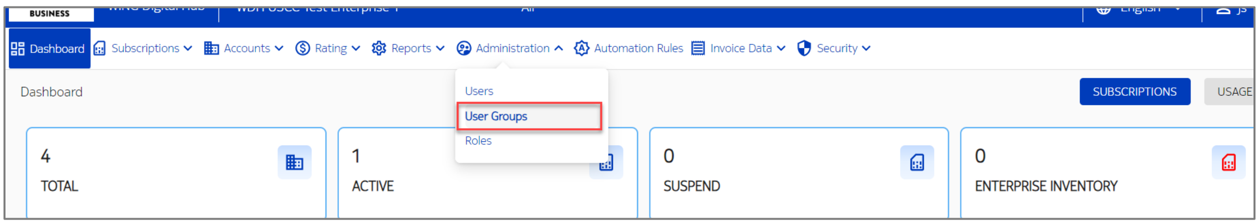
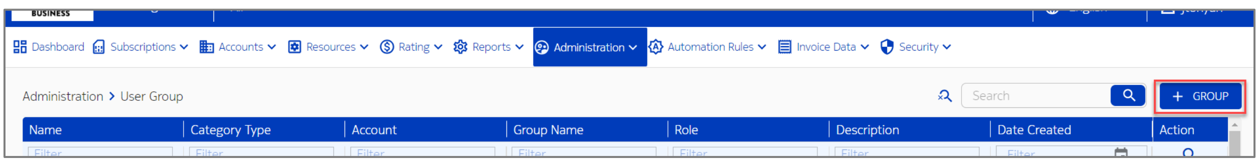
Creating Users in ConnectHQ

1. Login to ConnectHQ (Only Account Admins can add/remove account users)
2. Select the Administration menu/User Groups (If your User Group has already been created on this account, you can use existing group and skip to step 5 in this section)



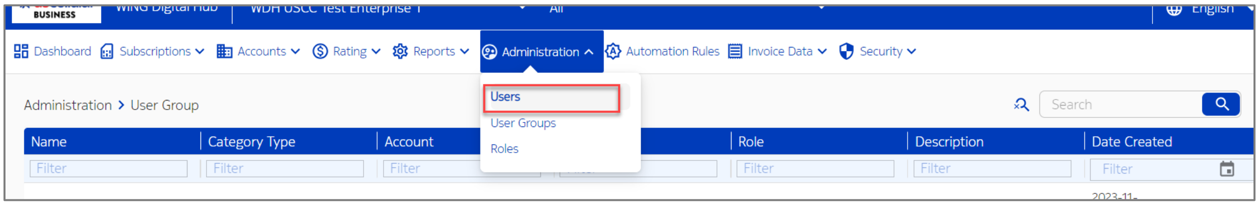
3. Select +Group



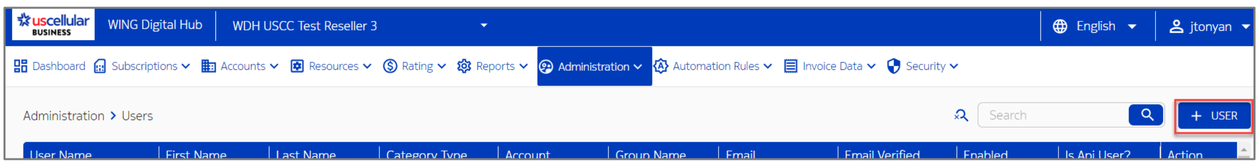
4. Fill out the values
    a. Name = Provide a name for your group (ex. Technical Team)
    b. Category = Account (You can choose Group if this user will be specific to a single group)
    c. Account = Select your account
    d. Role = Select role based on what access you need for this group
        i. ROLE_ACCOUNT_ADMIN – This role is for main account administrators and has full access to the account. They can change items on the account and create and assign other users.
        ii. Enterprise Technical – This role can access everything on the account and make changes. They will not be able to add additional users or create custom fields.
        iii. Enterprise View Only – This role can access all items on the account but only to view. They cannot make any changes.
        iv. Enterprise Sub-Account Admin – This role is only for users that need access to a single sub account. This role has the same level of access as ROLE_ACCOUNT_ADMIN but only for a single sub account.

e. Users = Can add available users here or you can click Create and add Users to this Group later

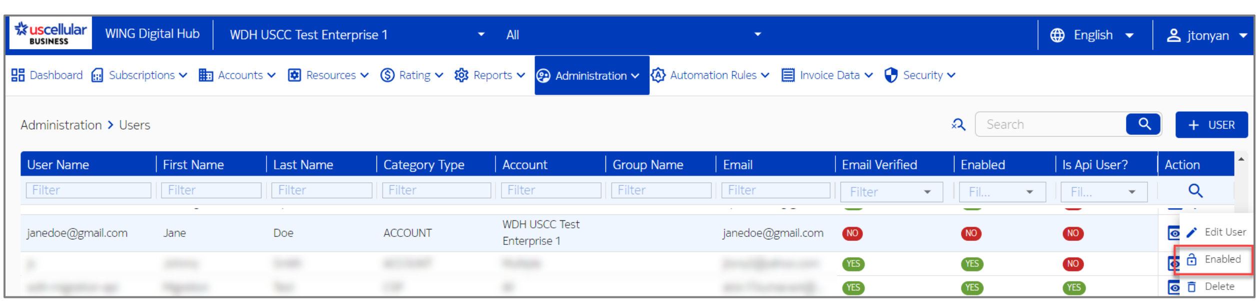
5. Select the Administration menu/Users



6. Select the +USER icon



7. Fill out the values
   a. First Name
   b. Last Name
   c. User Name = email address of the user is preferred
   d. Category = Account (You can choose Group if this user will be specific to a single group)
   e. Select Main Account User bubble
   f. Select Main Account = Select the Main parent account or for subaccounts, select the actual subaccount
   g. User group = Select one of the User Groups available
   h. Email
   i. Is Api User = toggle turned off (If you need access to APIs, please contact your sales support team for assistance)
8. Click Create
9. On Administration menu, Enable the user



10. After user enabled, user will receive confirmation email. Once email sent, user can go to ConnectHQ and perform a reset password at any point.