Managing User Accounts and Privileges

Here are described the different aspects of access management:

1. Access management for the account of your business (eg: administration, delegation, access for your IT department or your DPO) ;
2. Privileges management for the staffs handling appointments;
3. Reminder on the way user licenses are used.

Access & permission

To create a user that is not attached to a staff member (note: these roles are global and will give that user access to that role's rights across all Locations) navigate to your account in the upper right corner of your **Dashboard**, select **Access and Permission**.
Then click the **Add** button. In the window that opens, complete blank fields and select the rights you would like the user to have. Below is a list of what rights each role gives.

- **Administrator** - Full access and control of the platform
- **Analytics** - Access to *Reports*, the ability to create custom reports, email/export reports, view completed forms, and listen to call recordings
- **Billing** - Access to *Payment & Budget* to add communication credits/change subscription
- **Button Management** - Access to the *Installation* page to create, edit, delete, add emails for notifications to, and install all buttons
- **Chief Data Officer** (CDO) - Access to the *Privacy policy* settings

After you hit **Save**, an invitation will be sent to the address entered previously informing them that they have been granted rights. If the email address already has an account associated with it, upon clicking **Sign in**, they will be prompted to sign in in order to connect their account. If the email address does not have an account associated with it, clicking **Sign in** will prompt the user to create a new account.

Note: new users will need to verify there account through an email sent post creation

Managing Staff Member Rights for scheduling

You can also assign Staff Roles to a staff member (note: even if a staff member is associated with multiple Locations, giving a staff member a role will only apply to the selected location) by navigating to **Settings** from your **Dashboard**, selecting your Location from the dropdown menu at the top of the screen (if you only have one, skip this step), click **Staff**, select the staff member you would like to add rights to, and scroll down to the "Staff Roles" section. From here select which role you would like to give that staff member and hit **Save**.

Staff Roles can all be customized by going to the **Settings** beneath "Scheduling" on your Dashboard, click **General Settings**, and scroll down to "Staff Roles". From here you can select each of the roles and check the boxes beside what you would like users to have access to.

After you hit Save, an invitation will be sent to the address entered previously informing them that they have been granted rights. If the email address already has an account associated with it, upon clicking Sign in, they will be prompted to sign in in order to connect their account. If the email address does not have an account associated with it, clicking Sign in will prompt the user to create a new account.

Note: new users will need to verify there account through an email sent post creation

User licenses

Your account may have a limited number of user licences (seats). Please note that one user license is used for:

- Each additional scheduling staff member, if the associated email address is not listed in the account *Access & Permissions*
- Each additional user access in the account *Access & Permissions* (eg: administration delegation, web reporting, CDO)