Tutorial 3: Adding and Editing Users

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Before we can add a new user, or modify existing users, we need to look at **user ROLES**:

User Roles

There are 5 different user roles in custodian™. You'll see how these different roles interact later in the WorkFlow tutorial. For now, here's what you need to know about user roles …

ADMIN role

The ADMIN role can do anything. No restrictions. BUT – *a word of caution* – the ADMIN can delete your entire custodian account. They can also create other Admins with the all the same ADMIN privileges. *So be sure your admin user is a responsible and trusted employee.*

SUPERVISOR role

The Supervisor role is similar to the Admin role – but with a couple of restrictions. Supervisors can't delete the custodian™ account and they can't modify your company's information. They can create new Supervisor users, but they can create new Admin users. Only Admins can create new Admins. A big part of a Supervisors job will be assigning work to USERS and TECHS.

CLERK role

The Clerk role is mainly a data-entry role. A clerk can create new assets, they can add new locations, and create new users. For security reasons, a CLERK can't create a new ADMIN or SUPERVISOR.

USER role

In a large organization, the standard role – simply called USER – will be the most common. A standard USER can report issues, view details about assets, lookup other USERS and contacts. But they can't directly edit any of this information. If they see information that needs to be changed, they'll have to notify a SUPERVISOR. They *can* update details about work that is assigned to them.

TECH role

The Tech role is like a limited standard USER role. If your company hires independent third-party contractors to perform repair work, and would them to use custodian™, they should be designated as a TECH. TECHs can't browse your company records; they can't search through your contacts or your assets. They can only see information that has been assigned to them by a Supervisor.

Adding a New User

To **add** (*or modify*) a user, go to the side menu-panel and select: **ADMIN > Manage Users**

This will show you all of your company's users and their respective user-roles.

To create a new user, click the " **+ NEW USER** " button. Fill in the their **e-mail** address, full **name**, and designate their appropriate **user-role** from the drop-down list. Choose their notification type (SMS is only available in a PRO plan), and enter their **phone** numbers. A Mobile number is optional, but necessary for SMS-text notifications. Be sure to **save** when you're done.

The new user will receive an email message with a login-link so they can start using custodian™ right away.

Editing an Existing User

To **edit** an *existing* user, in the left menu-panel choose: **ADMIN > Manage Users**

Search the list to identify the user you wish to edit. Click the corresponding **Edit** button to view their details. Make the necessary changes, and **Save**.