Adding a Contact as a User

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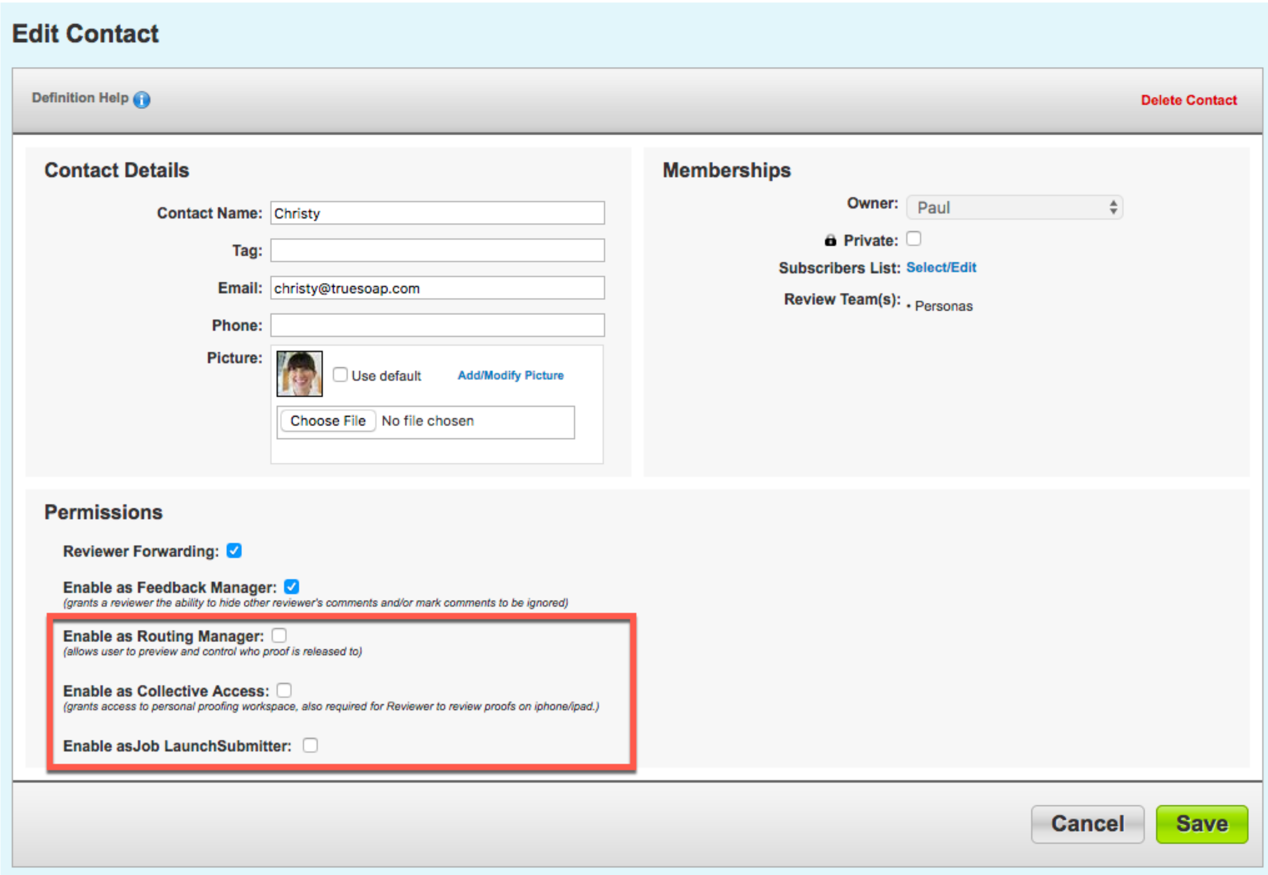
When a Contact's role changes and they need to be upgraded to an available licensed user seat, you can add an existing Contact as a User.

Modifying the Contact Record

1. Click on the '**Contacts'** tab.
2. Click on the contact you wish to adjust.
3. Remove any of the following permissions, if applied.
    - Routing Manager
    - Collective Access
    - Job Launch Submitter
4. Click '**Save**.'

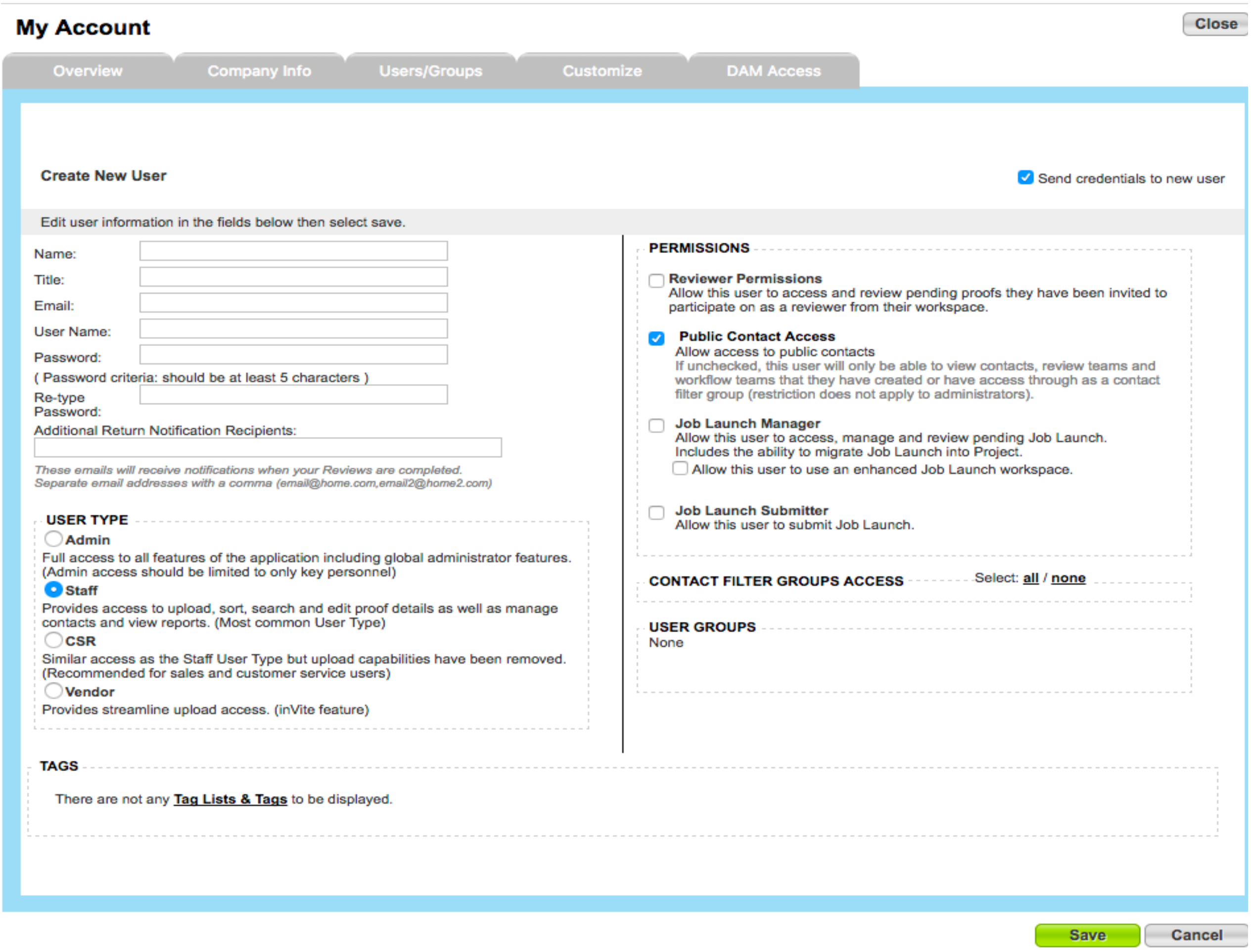


> If the contact was a Job Launch Submitter, disabling this permission will prevent them from having access to their previous or current requests. In this scenario, please contact support and we can migrate the contact's job launch requests to their newly created user record.

Creating the User Record

1. Go to **Account > Account Settings > Users/Groups**
2. Click **'New User'** to begin.
3. Enter in the appropriate user details, select the appropriate user type and assign permissions as applicable.
4. Click **'Save'** to create the account.

> The email address must match the contact email record in order for the user login to be associated with the applicable proof reviews, otherwise this will create confusion in the review process.


My Account
Close
Overview
Company Info
Users/Groups
Customize
DAM Access
Create New User
Send credentials to new user
Edit user information in the fields below then select save.
Name:
Title:
Email:
User Name:
Password:
(Password criteria: should be at least 5 characters)
Re-type Password:
Additional Return Notification Recipients:
These emails will receive notifications when your Reviews are completed.
Separate email addresses with a comma (email@home.com,email2@home2.com)
USER TYPE
Admin
Full access to all features of the application including global administrator features. (Admin access should be limited to only key personnel)
Staff
Provides access to upload, sort, search and edit proof details as well as manage contacts and view reports. (Most common User Type)
CSR
Similar access as the Staff User Type but upload capabilities have been removed. (Recommended for sales and customer service users)
Vendor
Provides streamline upload access. (inVite feature)
PERMISSIONS
Reviewer Permissions
Allow this user to access and review pending proofs they have been invited to participate on as a reviewer from their workspace.
Public Contact Access
Allow access to public contacts
If unchecked, this user will only be able to view contacts, review teams and workflow teams that they have created or have access through as a contact filter group (restriction does not apply to administrators).
Job Launch Manager
Allow this user to access, manage and review pending Job Launch. Includes the ability to migrate Job Launch into Project.
Allow this user to use an enhanced Job Launch workspace.
Job Launch Submitter
Allow this user to submit Job Launch.
CONTACT FILTER GROUPS ACCESS
Select: all / none
USER GROUPS
None
TAGS
There are not any Tag Lists & Tags to be displayed.
Save
Cancel