



## Mobile Business Manage Users

### Add a New User

Add new users and grant them online access.

### Business Manage Users - Add a New User Step-by-Step

Use the following steps to add new users and assign them a role.

Step	Action
1	Tap <b>Menu</b> at the bottom right of the screen.
2	Tap the <b>Manage Users</b> drop-down arrow.
3	Tap the <b>Users</b> hyperlink.
4	Tap the <b>More Actions</b> (:) icon at the top right of the screen.
5	Tap the <b>+ Add a New User</b> hyperlink at the bottom of the screen.
6	Tap to select the <b>Verification Method</b> (SMS, Voice, or Email) using the drop-down arrow.
7	Tap to select either a <b>10-digit Phone Number</b> or an <b>Email Address</b> using the drop-down arrow.
8	Optional: Tap the <b>Cancel</b> button to cancel adding a new user.
9	Tap the <b>Next</b> button to continue.
10	If prompted to verify your identity, follow the online prompts to continue. If not, simply continue to the next step.
11	Tap to enter the <b>Verification code</b> in the Verification Code field.
12	Optional: Tap the <b>Cancel</b> button to cancel adding a new user.
13	Tap the <b>Next</b> button to continue.
14	Tap and scroll to enter the following information in the corresponding fields: <ul style="list-style-type: none"><li>• First Name</li><li>• Last Name</li><li>• (Optional) Address</li><li>• (Optional) Address 2</li><li>• (Optional) City</li><li>• (Optional) State</li><li>• (Optional) Zip Code</li><li>• (Optional) Title</li><li>• (Optional) Home Phone</li><li>• (Optional) Mobile Phone</li><li>• (Optional) Work Phone</li><li>• Email</li><li>• Username following the Username must criteria</li></ul>
15	Scroll, then tap to select the <b>Send Password to Method</b> (SMS or Email) using the arrow.
16	Tap to select either a <b>10-digit Phone Number</b> or an <b>Email Address</b> using the drop-down arrow.
17	Optional: Tap the <b>Cancel</b> button to cancel adding a new user.
18	Tap the <b>Continue</b> button.
19	Tap to select a <b>Role</b> using the drop-down arrow.



## Add a New User Step-by-Step continued

Step	Action
20	Tap to select arrow to choose from the existing list of roles. <b>or</b> Tap the <b>+ Create New Role</b> hyperlink to create a new role.
21	Optional: Tap the <b>Back</b> button to return to the previous page.
22	Tap the <b>Continue</b> button.
23	Tap to select the <b>Access Permission</b> drop-down arrow and select from the following: <ul style="list-style-type: none"><li>• Custom</li><li>• No Access</li><li>• Unrestricted</li><li>• Weekdays 8:00am to 6:00 pm</li><li>• Weekdays 9:00am to 5:00pm</li></ul>
24	Specific access can be assigned for each day of the week using the <b>drop-down arrow</b> next to each day.
25	Optional: Scroll down to tap the <b>Back</b> button to return to the previous page.
26	Scroll down to tap the <b>Continue</b> button.
27	<b>Review</b> details of the New User displays.
28	Optional: Tap the <b>Back</b> button to return to the previous page.
29	Tap the <b>Confirm</b> button. A confirmation message displays showing the <b>New User</b> has been added.
30	Optional: Tap the <b>Add New User</b> hyperlink to add another User.
31	Tap the <b>View User</b> button to view a list of all Users.
32	Tap the <b>Done</b> button.