disclosure services
Expert Support. Informed Clients. Clear Decisions.

MANAGING USERS

The **Users** tab will only be visible for you if you have the **Client Admin** role assigned to you

SETTING UP A NEW USER

1. Navigate to the '**Users'** tab
2. Click the '**Add user**' button
3. Insert the new users information ensuring that the email address is correct. The user will receive a welcome email which will enable them to create their own password to the portal
4. Select their role:
   - **Client Admin Role** - The Client Admin role is the highest level of access available to a user within your organisation. A Client Admin is able to add users, edit the details for the organisation and view invoices.
   - **Client Editor Role** - The Client Editor is unable to add users for the organisation and cannot amend any information on behalf of the organisation.

   Both roles have the same processing/tracking functions.
5. Assign the user to the organisation.
   - Click the '**Select Organisation'** button, choose the correct organisation and click '**Confirm**' *(if the organisation is not on the list, please contact Disclosure Services)*
6. The new user should receive a welcome email with the link to the Client Portal which will enable them to create their password. If the user didn't receive the email, please check that the email details you have entered are correct. If so, please contact Disclosure Services who will be able to resend this email.

EDITING USER DETAILS OR DISABLING USER

1. Navigate to the '**Users**' tab
2. Click the **pencil** button next to the user name to edit their details
3. Click the ☰ button to **Disable** the user