

# Adding Users Individually

1. To add an individual user, in the **Company Management** tab, select the **Add New User** icon located in the activity bar on the right side of the screen.

The screenshot shows the FileFlex administration interface. The 'Company Management' tab is selected and circled in red. The 'New User' form is displayed on the right side of the screen. The form includes the following fields and options:

- Name:** John Smith
- Email:** john.smith@beanaccounting.com
- Password:** (empty field)
- Confirm Password:** (empty field)
- ☒ **Require user to reset password on login**
- ☒ **Auto-generate**
- Department:** (empty field)
- Sales:** (empty field) **Assign**
- Provider:** (empty field)
- Sales Server; Office\_System; Marketing Drive:** (empty field) **Assign**
- Cancel** and **OK** buttons at the bottom right.

*Selecting and Adding a New User*

2. Fill in the user's name and email.
3. Set the user's password. a. You can either manually create a password for the user, or select **Auto-generate** to have FileFlex automatically generate a strong password for them instead. b. You can require the user to change their password the next time they log in by checking the box next to **Require user to reset the password on login**.
4. Assign them to a department by clicking the **Assign** button under the **Department** heading. If you assign a user to multiple departments, they will receive the role privileges from each department. **You must add each user to at least one department.** a. The content providers will be assigned to the user when they are assigned a department. You can add or delete the content providers by clicking the **Assign** button under the **Provider** heading. You can add or delete content sources to a user regardless of what department they belong to. Assigning additional providers is optional.
5. Click **OK** when finished to add the user.
6. When you created a new user, an auto-generated email will be sent to that with their FileFlex user name and password and a link to their onboarding instructions.