

CITKNOW

User Access



User Access Print

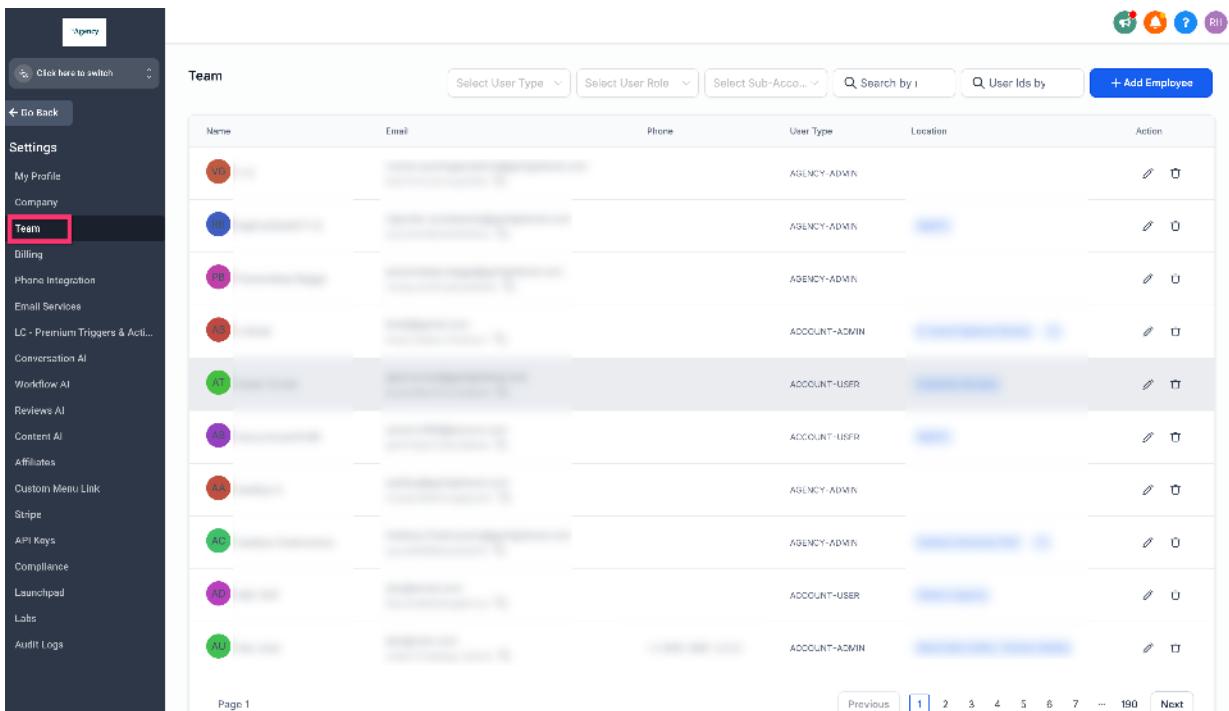
1. Agency Team Management:

This section is used by the agency to grant its employees or a client employee access to all or select client accounts.

To access Agency Team Management follow these steps:

1. Click "Settings" in the side navigation menu of the Agency View

2. Click "Team"



The screenshot shows the 'Team' management page within the Agency View. On the left, a sidebar menu is visible with various settings options, and the 'Team' option is highlighted with a red box. The main area is a table titled 'Team' with the following columns: Name, Email, Phone, User Type, Location, and Action. The table lists several users, each represented by a colored circular icon and a name. The 'User Type' column shows categories like 'AGENCY-ADMIN' and 'ACCOUNT-USER'. The 'Action' column contains edit and delete icons. At the bottom of the table, there are navigation links for 'Previous' and 'Next' pages, with the current page number '1' highlighted.

Here you can add, edit detail, or delete users.

Adding or editing a user allows you to update:

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1. Personal logo
2. First name
3. Last name
4. Email (login email)
5. Phone
6. Password (login password)
7. [Permissions](#) (see article)
8. User Type
 1. Agency: Grants them access to all accounts under the agency
 2. Account: Select individual accounts you would like them to have access to
9. Add Account
 1. If agency type is selected, the user will receive notifications pertaining to the accounts selected here
 2. If account type is selected, the user will only have access to accounts selected here

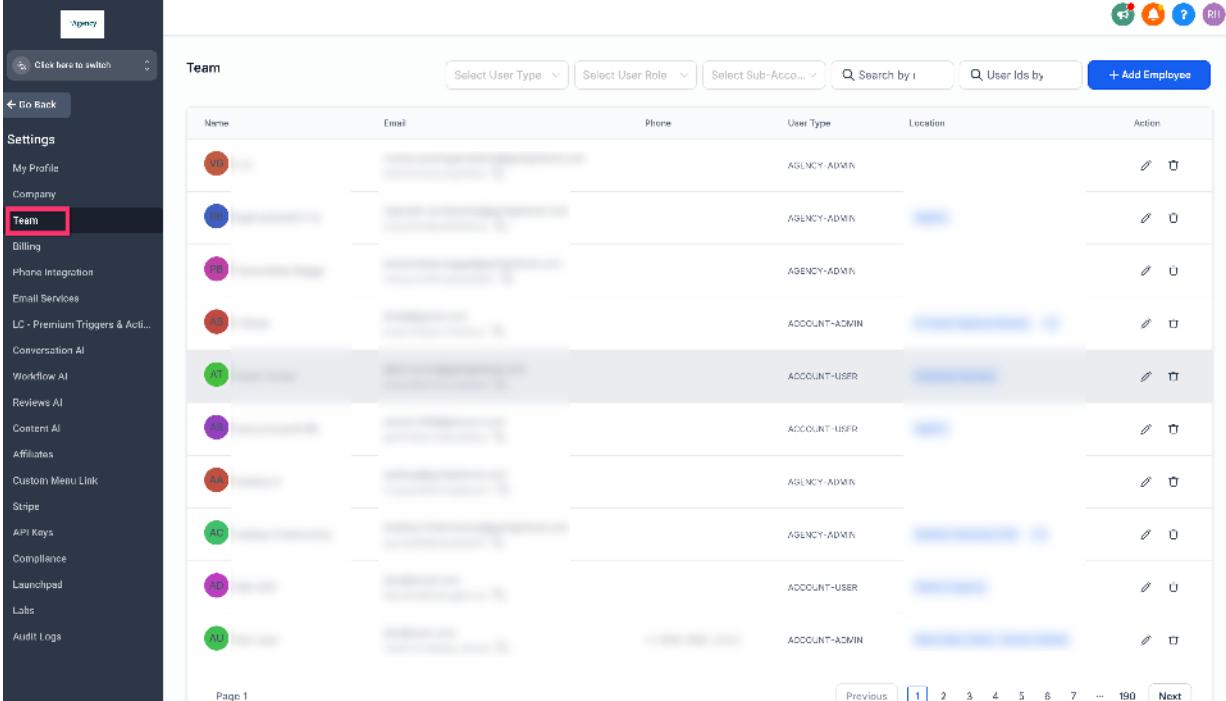
2. Team Management

This section is used by the client to grant its employees access to their specific HighLevel account. Any employee created here will show up in Agency Team Management (1. above).

To access Team Management complete the following steps:

1. Click "Settings" in the side navigation menu of the sub-account view
2. Click "My Staff"

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The screenshot shows a user interface for managing team members. On the left, a sidebar menu lists various settings and features, with 'Team' highlighted. The main area is titled 'Team' and displays a table of users. The table columns are: Name, Email, Phone, User Type, Location, and Action. The 'User Type' column shows categories like 'AGENCY-ADMIN', 'ACCOUNT-ADMIN', and 'ACCOUNT-USER'. The 'Action' column contains edit and delete icons. The table has 190 rows, with page 1 currently selected. The 'Team' menu item in the sidebar is highlighted with a red box.

Name	Email	Phone	User Type	Location	Action
MB			AGENCY-ADMIN		 
MB			AGENCY-ADMIN		 
PB			AGENCY-ADMIN		 
AS			ACCOUNT-ADMIN		 
AT			ACCOUNT-USER		 
AS			ACCOUNT-USER		 
AS			AGENCY-ADMIN		 
AC			AGENCY-ADMIN		 
AD			ACCOUNT-USER		 
AU			ACCOUNT-ADMIN		 

Here you or the client can add, delete, or edit details of an a user

Adding or editing an user allows you to update:

1. Personal logo
2. First name
3. Last name
4. Email (login email)
5. Phone
6. Password (login password)
7. Permissions (see article)

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