CITKNOW

User Access

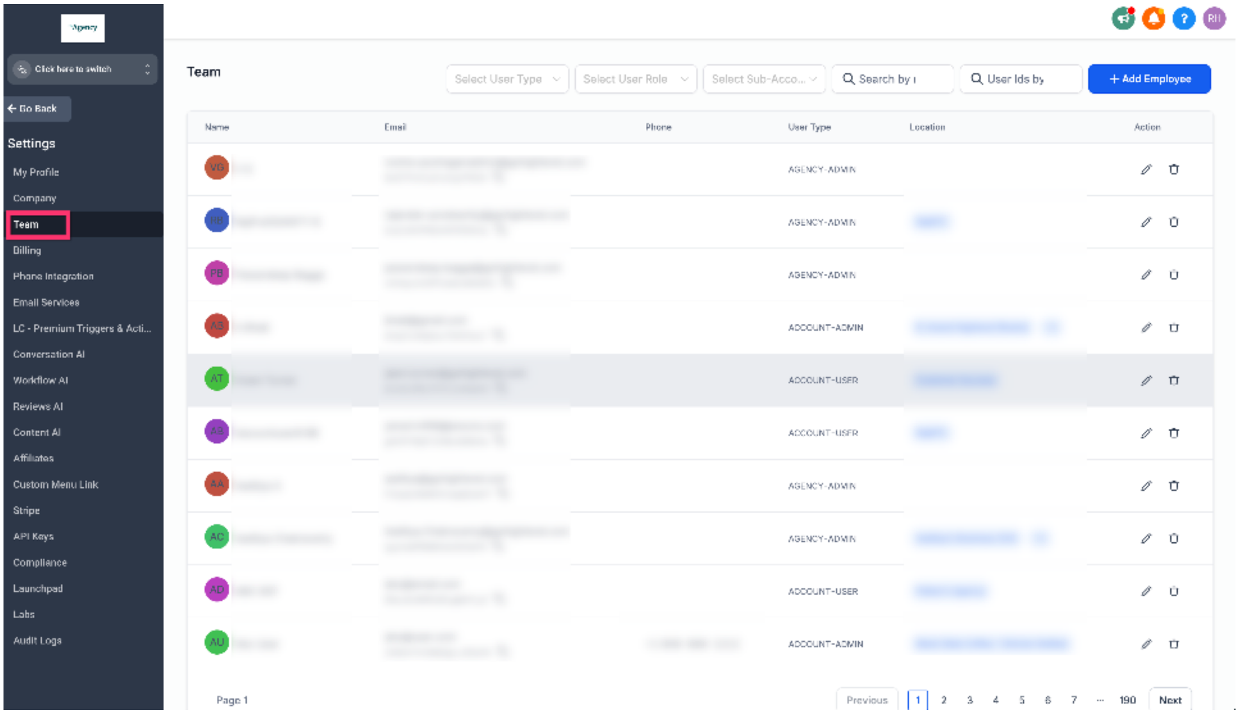
User Access Print

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"



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

Adding or editing a user allows you to update:

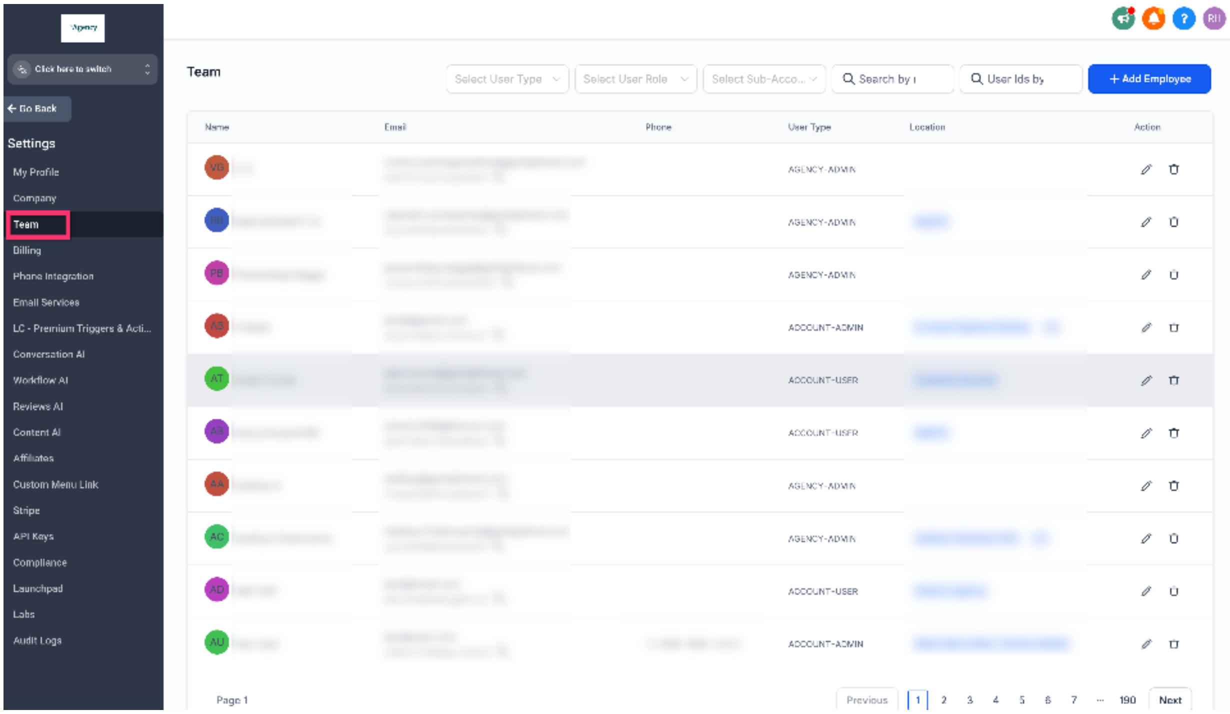
1. Personal logo
2. First name
3. Last name
4. Email (login email)
5. Phone
6. Password (login password)
7. Permissions (see article)
8. User Type
    1. Agency: Grants them access to all accounts under the agency
    2. Account: Select individual accounts you would like them to have access to
9. Add 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"



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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