

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 interface. On the left, a sidebar menu lists various settings, with 'Team' highlighted. The main content area is titled 'Team' and features a table of users. The table has columns for Name, Email, Phone, User Type, Location, and Action. The users listed include Agency Admins and Account Users. A '+ Add Employee' button is located in the top right corner of the table area. The bottom of the page shows pagination controls, indicating 'Page 1' and a total of 190 items.

Name	Email	Phone	User Type	Location	Action
[User]	[Email]	[Phone]	AGENCY-ADMIN		[Edit] [Delete]
[User]	[Email]	[Phone]	AGENCY-ADMIN		[Edit] [Delete]
[User]	[Email]	[Phone]	AGENCY-ADMIN		[Edit] [Delete]
[User]	[Email]	[Phone]	ACCOUNT-ADMIN		[Edit] [Delete]
[User]	[Email]	[Phone]	ACCOUNT-USER		[Edit] [Delete]
[User]	[Email]	[Phone]	ACCOUNT-USER		[Edit] [Delete]
[User]	[Email]	[Phone]	AGENCY-ADMIN		[Edit] [Delete]
[User]	[Email]	[Phone]	AGENCY-ADMIN		[Edit] [Delete]
[User]	[Email]	[Phone]	ACCOUNT-USER		[Edit] [Delete]
[User]	[Email]	[Phone]	ACCOUNT-ADMIN		[Edit] [Delete]

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

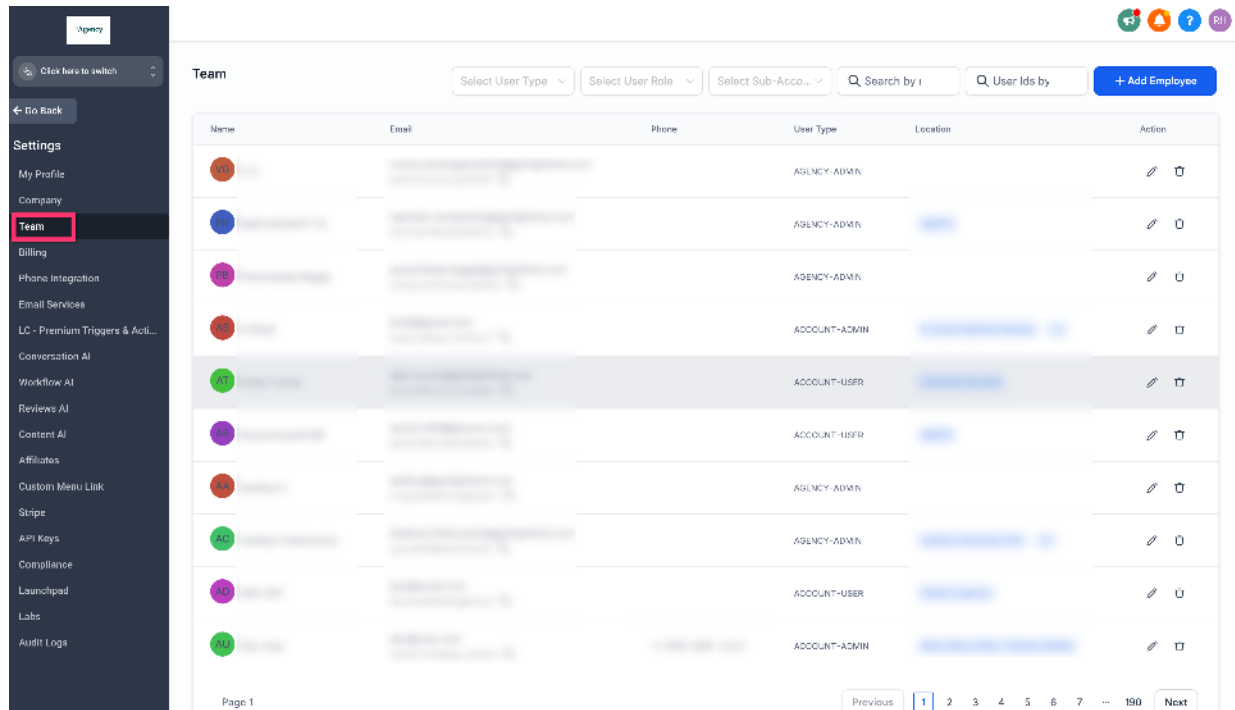
2. Team Management

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"

User Access



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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