

Introduction

This document is a step-by-step guide to set up Users within Unify Record.

Prerequisites

Before using Users, confirm that you have access to the relevant Settings and permission to manage Users. Available actions may vary depending on your role.

Before you begin

Screenshots provided in this set up guide may appear different than your Unify Records screens, either due to different permissions, field configurations, or browser settings.

Users: A User Guide

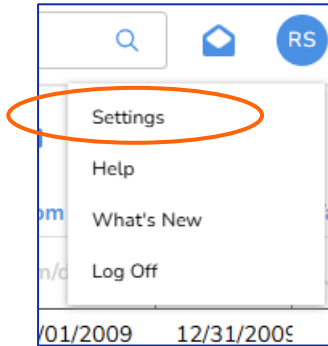
Creating a new User

This section will walk through creating a user.

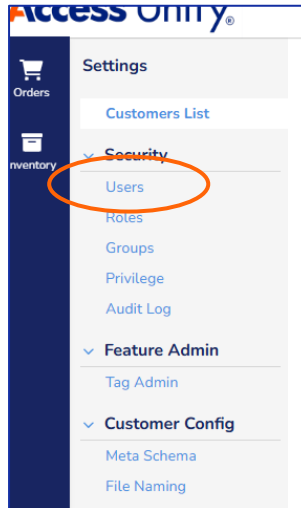
Actions – creating a group

Action Log into Unify, if not already logged in

Action Navigate to the User Menu by clicking on your initials, and click on ‘Settings’

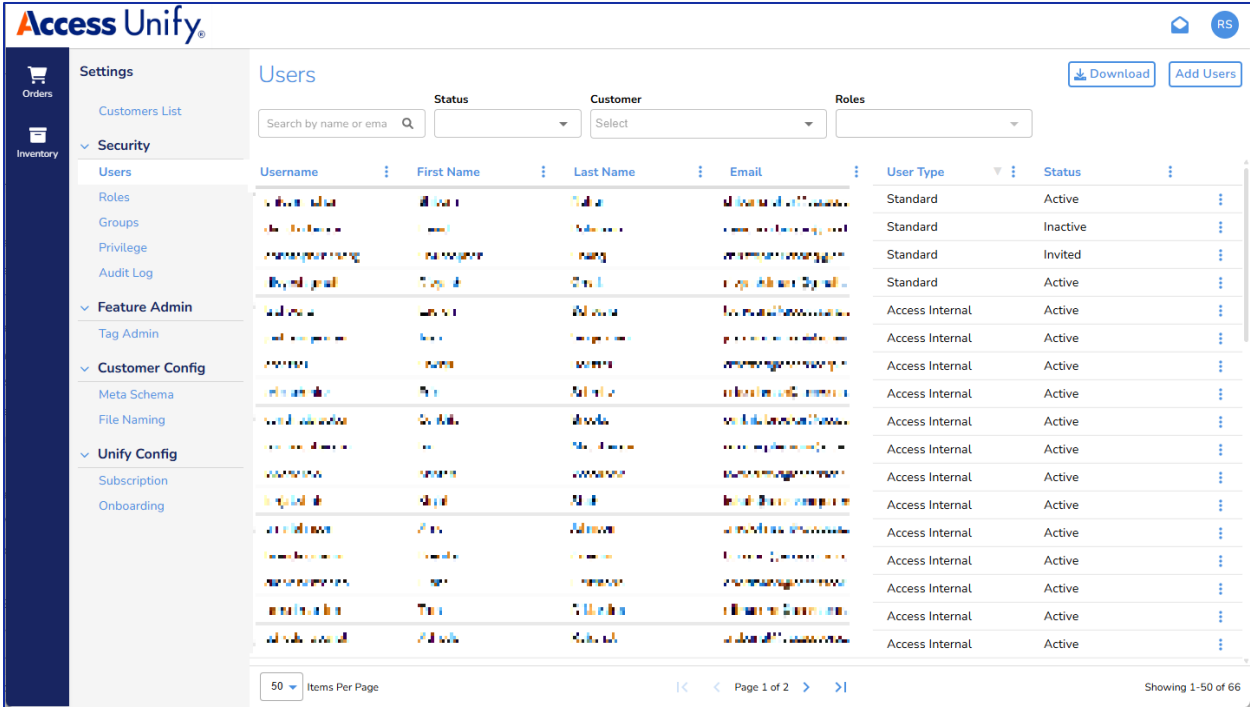


Action Click Users in the side panel.



Orientation The Users page will be presented with a grid of all of the users who have access to your account.

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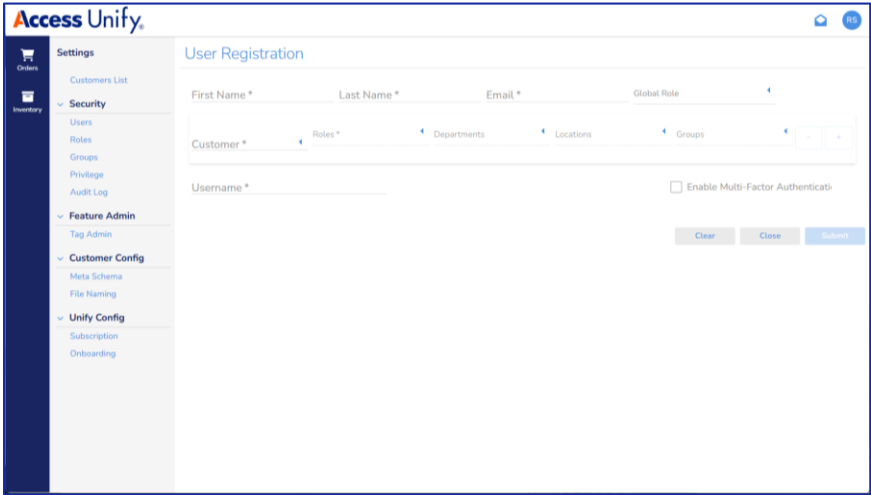


INFORMATION: The user information above has been pixelated.

Action To add a new user, click 'Add Users' toward the top right of the screen.



Orientation The User Registration screen will be displayed.



Action Enter the First Name, Last Name, Email, a Username. These are text fields.

NOTE: The username and email must be unique.

Users: A User Guide

Action Select the Customer from the drop-down menu. Then select the Role.

NOTE: A user may have one or more roles for a given customer.

Optional Optionally, you may select a Group the user will belong to.

Optional Optionally, you may enable Multi-Factor Authentication for the user.

NOTE: Multi-factor authentication will force the user to login with their email/password combination as well as sending a one-time passcode via email or authentication app.

Optional Optionally, a user may have access to multiple customers. If so, click the '+' icon and a new row will appear.

NOTE: If your user has only one customer account, the '+' icon will be disabled.

Action On the bottom right of the screen, click 'Submit'.

SUCCESS! You have successfully created a user.