

# Adding New Users to ipage®

Easily add new users to ipage with the help of these step-by-step instructions. Please note that only Administrators can add and delete users from an ipage account.

1. Log in to ipage and click on **My Account** in the top black tool bar.  
Then click on **User Administration** in the upper left column of the drop-down menu.
2. Assign a UserID for the new user and click **Add New User**.

The screenshot shows the 'User Administration' page. At the top, there is a section titled 'Add New User' with a sub-header 'Add New User'. Below this, a message states: 'Please create UserIDs that are at least six characters long and include one number or more.' There is a text input field for 'New UserID:' followed by an 'Add New User' button. Below this is a 'Search Account Users' section with a sub-header 'Search Account Users'. A message says: 'To locate specific user(s) for this account, enter any combination of first or last name, or UserID.' There are three search criteria: 'Search By: First Name:' with a text input, 'Last Name:' with a text input, and 'UserID:' with a text input. A 'Search' button is located to the right of the UserID field.

3. Fill out the User Details and assign Access Rights.

The screenshot shows the 'User Details' page. At the top, there is a section titled 'User Details Easy Clicks' with two links: 'Assign Access Rights' and 'Account Access List'. Below this is a 'Test' section with a 'Submit' button. There are several input fields: 'First Name:', 'Last Name:', 'Email:', and 'Phone:'. The 'Email' and 'Phone' fields have an asterisk (\*) indicating they are required. Below the input fields are labels for 'First Login:', 'Last Login:', 'Date Added:', and 'Added By:'. At the bottom, there is an 'Assign Access Rights' section with a message: 'Please select the level of security access you wish to give each new ipage user in your organization. These users will only have access to this information for the accounts you specify. To view the functions/tasks permitted for each role, click the role name below. Please check all that apply.' There are two columns of checkboxes. The first column contains: 'Administrator', 'Accounts Payable \*\*', 'Account Manager \*\*', and 'Bookkeeper'. The second column contains: 'Operations' and 'Ordering'. A note at the bottom states: '\*\* Giving users Account Manager and/or Accounts Payable rights means they automatically receive ipage access to information for all ship-to accounts under a billing account.'

## Administrator

All accounts have a Primary Administrator, but any user assigned Administrator rights can add, change, or delete users; access invoices and credit account information; edit and view contact information for your account; see and edit account addresses; create and manage lists; order and arrange Direct to Home\* ordering; arrange, enroll, and authorize electronic payments (EFTs); view the Ingram Extended database; check order and returns status; create returns; and view sales history reports.

## Accounts Payable

The Accounts Payable contact can access invoices and credit memos; authorize and execute electronic fund transfers; check order and return status; create returns; view Ingram Extended database; and view program enrollments and sales history reports.

## Account Manager

The Account Manager can access invoices and credit memos; edit and view contact information for your account; see and edit account addresses, create and manage lists; view the Ingram Extended database; check order & returns status; create returns; and view program enrollments and sales history reports.

## Bookkeeper

The Bookkeeper has the following capabilities, but only for their own ship-to account number: Users assigned this role can access invoices and credit memos; edit and view contact information; see and edit account addresses; create and manage lists; view the Ingram Extended database; check order and returns status; create returns; and view sales history reports.

## Operations

The Operations contact can view contact information and addresses; create and manage lists; view the Ingram Extended database; check order and returns status; and view program enrollments and sales history reports.

## Ordering

The Ordering contact can place orders, request Direct to Home shipments, view Ingram Extended database, and create and manage lists.

4. Select which accounts the new user can access. Stores with only one shipping location will see one option. Those stores with multiple shipping locations will see all listed and can choose to which account(s) the new user should have access. To select the account that the user will automatically be defaulted to when logging in, click Set As Default. Click "Submit" to finish.



The screenshot displays a web interface titled "Account Access List". It features a table with the following columns: "Billing Account", "Ship-To Account", "Account Name", "City", "State", "Access", and "Set As Default". The table contains one row of data, with most cells containing redacted information (black bars). The "Access" column has a checkbox, and the "Set As Default" column has a radio button. The interface includes a "Page 1 of 1" indicator, a "More Selection Options" dropdown menu, and "Submit" buttons in the top right and bottom right corners.

\*This is not applicable for ILS customers.