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# Users



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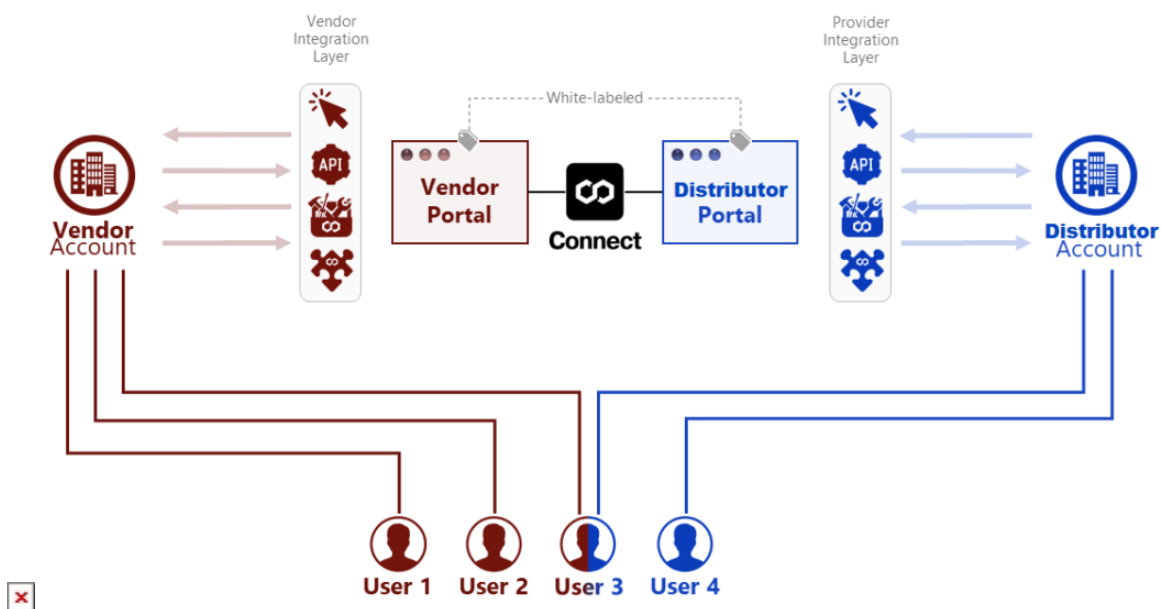
The **Users** menu allows adding new users, managing existing users or deleting them from your account.

The following provides specifications for the user objects on the Connect platform and contains instructions on how to add new users to your account and how to remove user objects.

## About Users

Users represent employees and team members at your organization (such as IT specialists, managers, sales representatives, etc.) that can access the CloudBlue Connect platform. Each Connect account should include at least one user that can generate invites to join their accounts.

Users can belong to multiple groups and multiple Connect accounts (whether they represent Vendor, Distributors, or Reseller accounts). The following diagram schematically illustrates such a scenario:



The diagram shows that *User 1* and *User 2* belong to Vendor account, while *User 4* belong to Distributor account. Note that *User 3* belongs to both Vendor and Distributor accounts. Therefore, this user can access Vendor and Distributor portal. Connect also allows implementing business cases, in which a user can access a Reseller portal as well as Distributor and Vendor portals.

## Adding Users

Access the **Users** menu and click **Add User** to launch a user creation wizard. The following wizard steps help you successfully configure a new user and send an invitation link to this user:



**CloudBlue** Settings HELP Front Street Inc  
Vendor: Robert Balboa

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- Service Levels
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**Users** DIRECTORY POLICIES + ADD USER

All users REFRESH FILTER SORT COLUMNS Rows per page 10 1-1 of 1 < >

NAME	EMAIL	AUTH MODE	JOINED AT	LAST SIGN IN...	
Robert Balboa UR:149-860-972	rbalboa@frontstreet.com	Built-in	12/17/2020 2:09 AM	12/08/2022 4:45 AM	

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**CloudBlue** Settings HELP Front Street Inc  
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All users REFRESH FILTER SORT COLUMNS Rows per page 10 1-1 of 1 < >

**Add user – Step 1**

- 1** General
- 2 Group
- 3 Summary

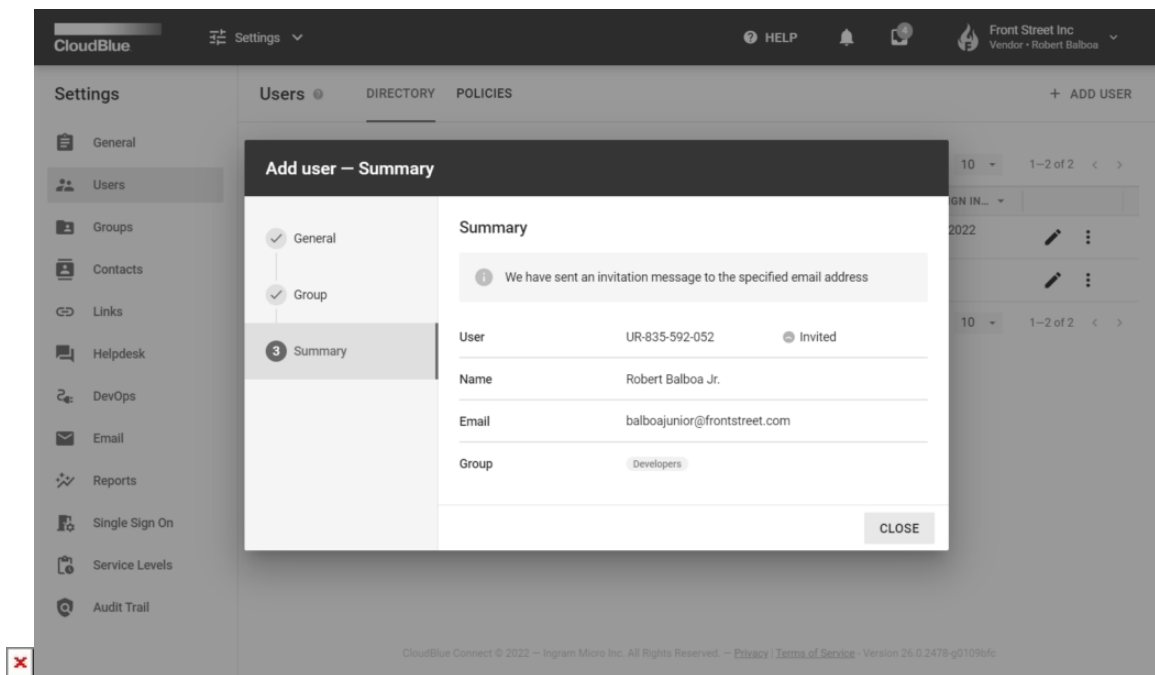
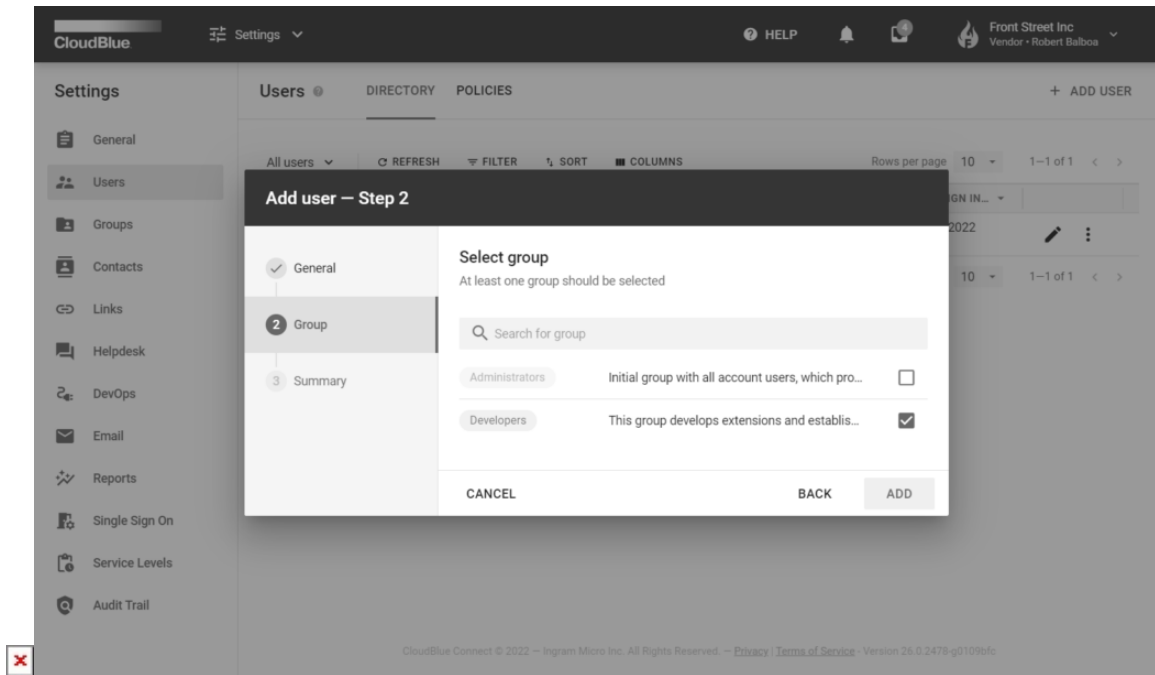
Name \*  
Robert Balboa Jr.

Email \*  
balboajunior@frontstreet.com

CANCEL NEXT

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1. **General:** Enter a *user name*. Thereafter, specify an *email* that serves as a login for your user.
2. **Group:** Specify a required group or groups for your new user.
3. **Summary:** As a result, the system provides a summary for your new user.

Therefore, the system will send an invitation to your created user. If this user is not registered in Connect, the invitation will contain a link to the registration form. In case this user already exists in Connect, your account will be available for that user at

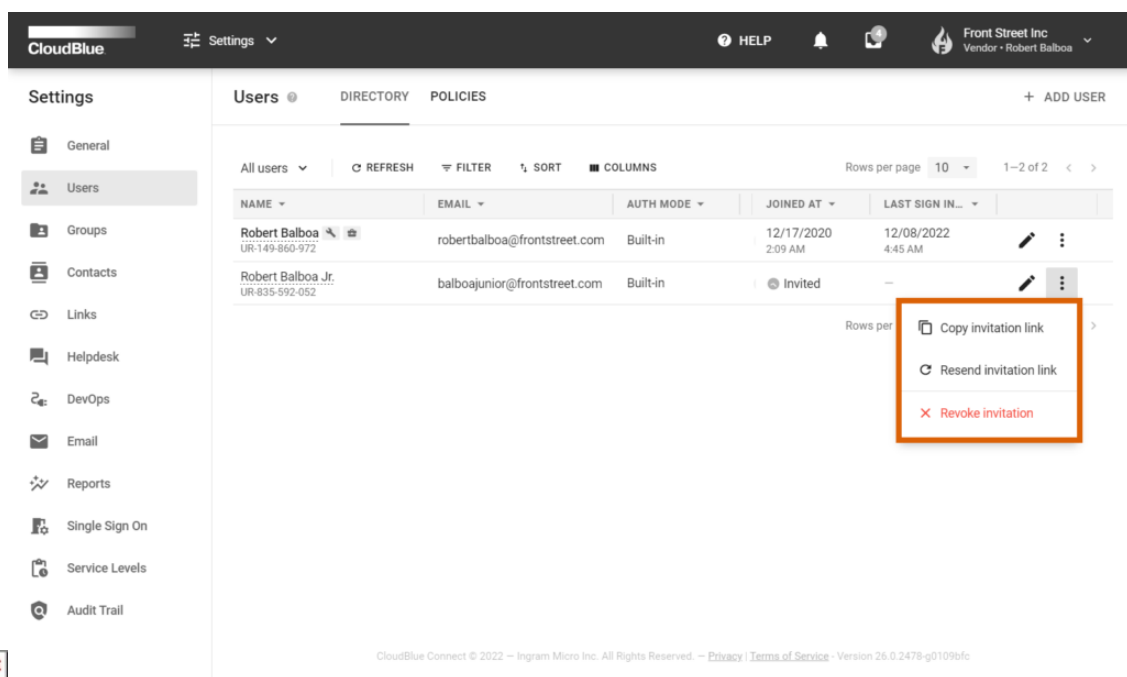


once.

## Managing Users

The system allows changing associated groups for each user by using the edit (✎) icon. In case your user is not yet registered in the system, you can also edit email and username for your provided invite.

The Connect platform also provides additional operations for your invited users. Click on the vertical ellipsis (⋮) icon next to your invited user to access these operations:



- **Copy invitation link:** Use this option in case you want to send an invitation link personally.
- **Resend invitation link:** Connect resends an invitation link to the specified email address.
- **Revoke invitation:** Click this button in case you need to revoke this invitation.

## Removing Users

Locate a user that you want to remove from your account and click the vertical ellipsis (⋮) icon on the corresponding row. Thereafter, click the **Delete** button to remove this user.



CloudBlue Settings

Users DIRECTORY POLICIES + ADD USER

All users REFRESH FILTER SORT COLUMNS Rows per page 10 1-2 of 2

NAME	EMAIL	AUTH MODE	JOINED AT	LAST SIGN IN...	
Robert Balboa UR-149-860-972	rbalboa@frontstreet.com	Built-in	12/17/2020 2:09 AM	12/08/2022 4:45 AM	
Robert Balboa Jr. UR-835-592-052	balboajunior@frontstreet.com	Built-in	12/17/2022 2:09 AM	—	

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### Note

After completing this operation you cannot use this user credentials to access and manage your current account.

Click **Delete** in the pop-up window to confirm your decision.