

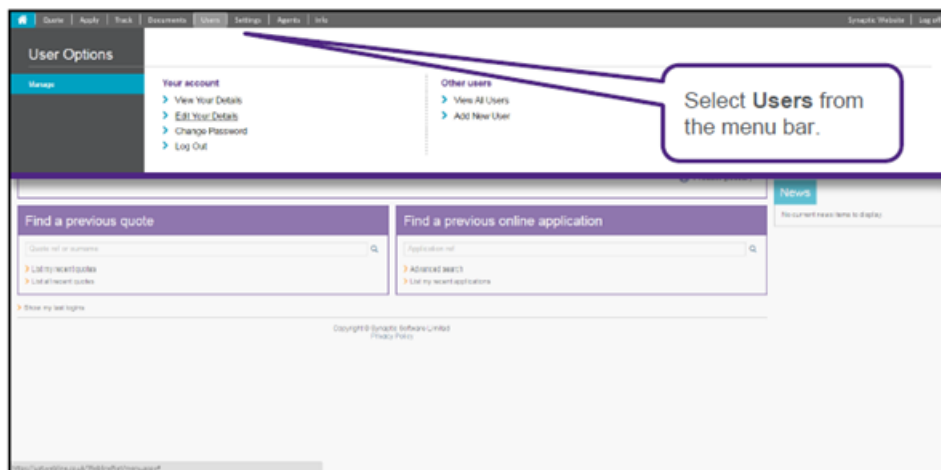
How do I create more user accounts on Webline?

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As part of the initial Webline registration, your firm has been provided with an administration user logon. You will be able to tell if your logon is an administration logon by checking Webline top right corner of the screen, which should say 'vendor administrator' on top of your name.

An administrator may use the system like any other user, but they have additional privileges including the ability to create new users. So in a firm with several users, each should have their own identity set up on the system – there is no extra charge for this. The administrator should immediately 'disable' a user if, for example, they leave the firm.

This user logon will be able to create and disable user accounts and reset users' passwords. From the top menu, select 'users' and 'add new user' to create new user account.



Now click the 'add new user' link in the left-hand menu. This will display the 'Add New User' screen:

Add User to vendor 1st Line Vendor Admin

Logon Details (* denotes mandatory Field)	
User Name	<input type="text"/> *
Check this box if you want a random password.	<input type="checkbox"/>
Password	<input type="password"/> *
Password again	<input type="password"/> *
Password must contain a minimum of 8 characters, including uppercase, lowercase letters, at least one number and one special character.	
LogonType	** Please Select ** ▾ *
Regulatory Details	
Individual Reference Number	<input type="text"/>
Personal Details	
First Name	<input type="text"/> *
Middle Name / Initial	<input type="text"/>
Surname	<input type="text"/> *
Contact Details	
Phone	<input type="text"/>
Fax	<input type="text"/>
Mobile	<input type="text"/>
Email	<input type="text"/> *
Check this box if you want the log on details to be sent to the new user.	<input type="checkbox"/>
<input type="button" value="Add User"/>	

Enter the details as required. Mandatory fields are marked with an asterisk (*).

When you reach the **LogonType** field, you will have 3 options to choose from:

- 1) **Vendor Administrator** - this will allow the user to access all settings and customise Weblines. It also includes the standard functionality of the **Vendor User** logon type.
- 2) **Vendor User** - this will allow the user to use Weblines to obtain quotes and apply electronically.
- 3) **Vendor Read Only** - this is a purely read-only account.

Fill out the rest of the details as required. If you would like to automatically email the logon details to the new user, ensure the email field is completed correctly, then tick the checkbox at the bottom of the form.

Then click **Add User** to confirm the new entry.

This is a multi-user environment and as such, there is no charge for creating & maintaining additional users within your account.

Please note that the administrator account can reset other users' passwords on a firm level. As of May 2020, passwords can be reset through the 'Forgotten your password' link on the homepage. If you have any questions, contact our Application Support Team on 0808 164 5463 Option 1 or email support@synaptic.co.uk.