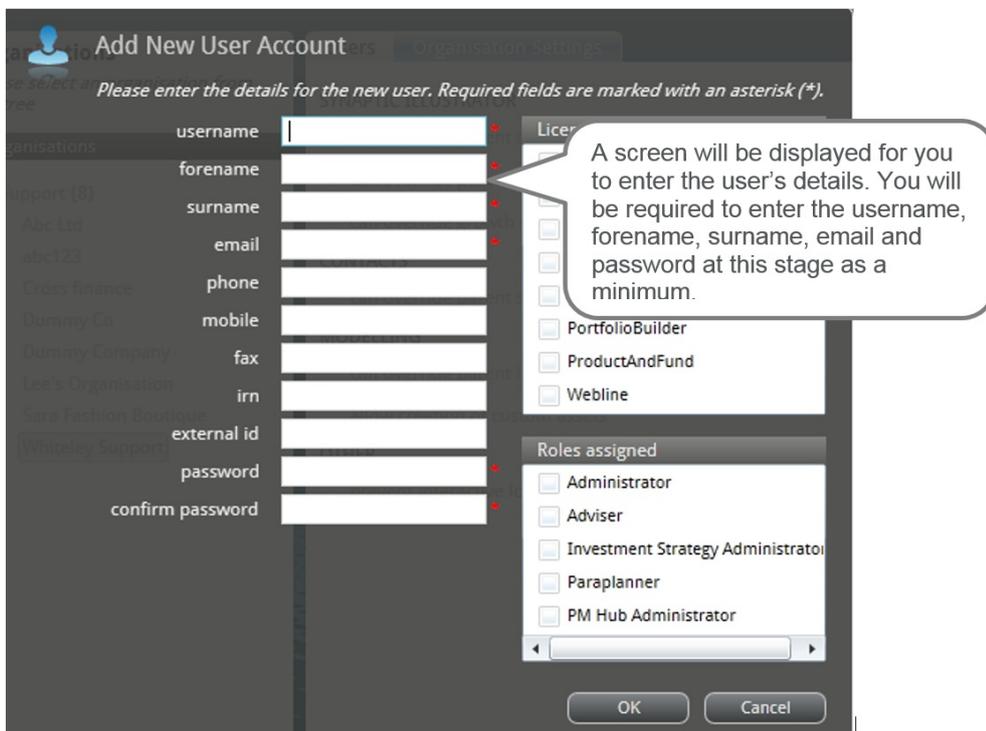
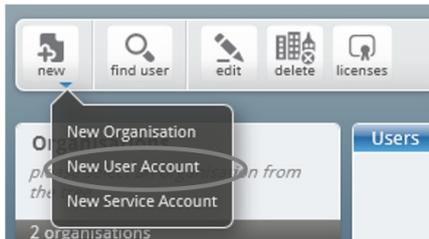


How do I add new users?

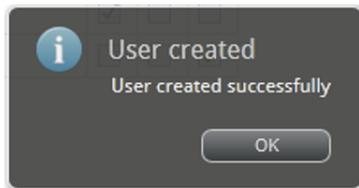
Last Modified on 19/02/2020 11:17 am GMT

In order to add users to an organisation, click on the organisation and then click **new** from the ribbon bar, selecting **New User Account**.

A screenshot of the 'Add New User Account' form. The form has a dark background and contains several input fields: 'username', 'forename', 'surname', 'email', 'phone', 'mobile', 'fax', 'irn', 'external id', 'password', and 'confirm password'. To the right of the form, there are sections for 'Licenses' (PortfolioBuilder, ProductAndFund, Webline) and 'Roles assigned' (Administrator, Adviser, Investment Strategy Administrator, Paraplanner, PM Hub Administrator). A callout box with a white background and a black border points to the form fields, containing the text: 'A screen will be displayed for you to enter the user's details. You will be required to enter the username, forename, surname, email and password at this stage as a minimum.' At the bottom of the form, there are 'OK' and 'Cancel' buttons.

Ensure the password entered is in the correct format.

A screenshot of the password and confirm password fields. The 'password' field contains a series of dots, and the 'confirm password' field is empty. A red callout box with a white border points to the password field, containing the text: 'The password is not complex enough; it must be at least 8 characters long, contain at least one uppercase character, one lowercase character and one digit'.



Click **OK** to finish.

NB The administrator must ensure that they read the next section below regarding user licences to complete this process.
