

Adding Users to Your Dashboard

- Log in to your dashboard and select **'Manage'**
- Select **'Users'**
- Choose which access level you would like them to have
- Add their contact information
- Select the Project Access, then **'Update Project Access'**
- Choose their reporting structure from the dropdown (it can be by the individual, overall, region etc.), then **'Update Access'**

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Knowledge Center Schedule Surveys Online Profile Contacts **Manage** My Issues

MSS **Users** Projects Structure Tags Brands Social Integrations API

Roger Rabbit

User created! Don't forget to add Reporting Unit level access otherwise this user will not be allowed to login.

Personal Information

Project Access

ROGER RABBIT CAN ACCESS:

- Client
- Talent Engagement
- Custom Clients

[Update Project Access](#)

Reporting Structure Access

Roger Rabbit does not have access to view any Units yet.

GRANT ROGER ACCESS TO (Start typing a Reporting Unit) [Update Access](#)

Notifications

Roger Rabbit does not have access to view any Reporting Units, therefore you cannot setup Notifications for them yet. Please add Reporting Structure Access first.

- Confirm which notifications they should receive, you can customize the 'Rates satisfaction' from 10, meaning they would receive an email notification for every response that comes in, then **'Update Notifications'**

Notifications

Additional access added!

[Set Globally](#) [Set Individually](#)

Responses

Alert me when respondent...

- Rates satisfaction **6 or lower**
- Provides a **Don't Know** answer
- Provides an **N/A** answer
- Provides a **shout out**

Issues

Alert me when...

- An issue is **escalated**
- An issue is **changed**

[Update Notifications](#)

Adding Users to Your Dashboard

Sending a Password – Four options!

1. Click **'Send Password Email'** when you create a contact, triggering an email to the person who you're creating a profile for.
2. **Create Reset link:** Click that button to create a url link that you can copy, paste and email the person directly. (This is a good option if you have a strong spam filter as the auto email may get caught in there)
3. Click **'Reset Password'** at the profile level to auto send an email to the individual.

Add New User

Personal Information

FIRST NAME
Roger

LAST NAME
Rabbit

EMAIL ADDRESS
whoframedme@clearlyrated.com

TITLE

PHONE

MAILING ADDRESS

1. Send Password Email
Save Information

Roger Rabbit

User created and the set-password email sent! Don't forget to add Reporting Unit level access otherwise this user will not be allowed to login.

Personal Information

FIRST NAME
Roger

LAST NAME
Rabbit

EMAIL ADDRESS
whoframedme@clearlyrated.com

TITLE

PHONE

MAILING ADDRESS

Save Information

Reset Password

Copy Password Reset Link

Create Reset Link

PASSWORD RESET LINK

<https://dashboard.clearlyrated.com/set-password/314025/yBTAnsBwY5xs5RlfvZi>

This reset code is valid for: 23 hours, 59 minutes

4. Send the following instructions to individual(s) who have been set up in the dashboard:

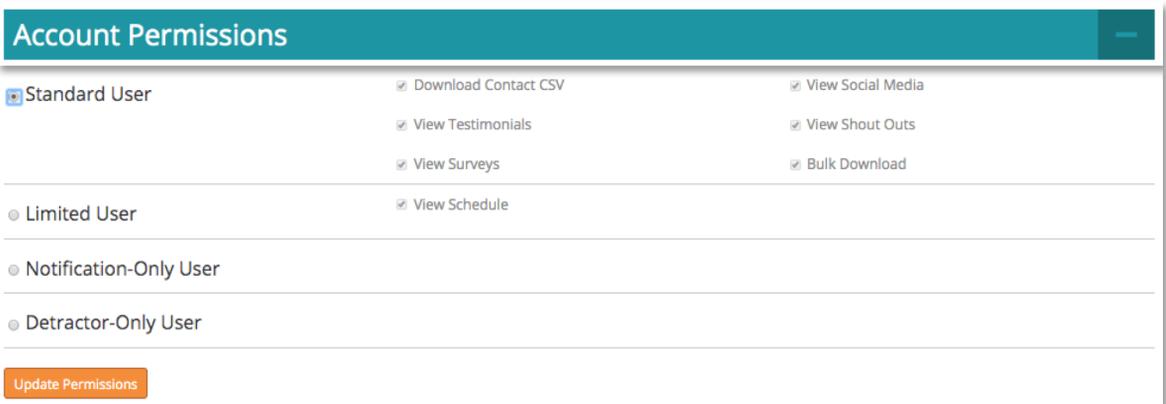
- Go to: <https://dashboard.clearlyrated.com/forgot-password>
- Type in your email address (this will be your username going forward)
- Click 'Reset password'
 - This will trigger a link to be sent to your inbox. Please check your spam as well as primary folders for this email.
 - The link will be live for 24hrs once you hit that reset button.

Adding Users to Your Dashboard

Different User Settings Explained

- **Administrator:** Holds the keys to the castle. Full access. All the things. You're welcome.
- **Standard User:** Most commonly used. Users can receive notifications, view surveys in the dashboard and have access to reports. Users can't update contacts.
- **Limited User:** Restricted to minimal activities, can just view the schedule
- **Notification-Only User:** Receives Shout outs and detractor notifications. No access to the dashboard
- **Detractor-Only User:** Detractor notifications only. No access to the dashboard.

Pro Tip! You can select access for one of the above but can also cherry pick from the one higher options! Ex. Being a standard user but giving access to 'manage contacts' from Admin level.



The screenshot shows a web interface titled "Account Permissions". It features a teal header bar with the title and a minus sign on the right. Below the header, there are four user roles listed on the left, each with a radio button. The "Standard User" role is selected. To the right of each role, there are checkboxes for various permissions. The "Standard User" role has six permissions checked: "Download Contact CSV", "View Social Media", "View Testimonials", "View Shout Outs", "View Surveys", and "Bulk Download". The "Limited User" role has one permission checked: "View Schedule". The "Notification-Only User" and "Detractor-Only User" roles have no permissions checked. At the bottom left, there is an orange button labeled "Update Permissions".

User Role	Permissions
<input checked="" type="radio"/> Standard User	<input checked="" type="checkbox"/> Download Contact CSV <input checked="" type="checkbox"/> View Social Media <input checked="" type="checkbox"/> View Testimonials <input checked="" type="checkbox"/> View Shout Outs <input checked="" type="checkbox"/> View Surveys <input checked="" type="checkbox"/> Bulk Download
<input type="radio"/> Limited User	<input checked="" type="checkbox"/> View Schedule
<input type="radio"/> Notification-Only User	
<input type="radio"/> Detractor-Only User	

[Update Permissions](#)