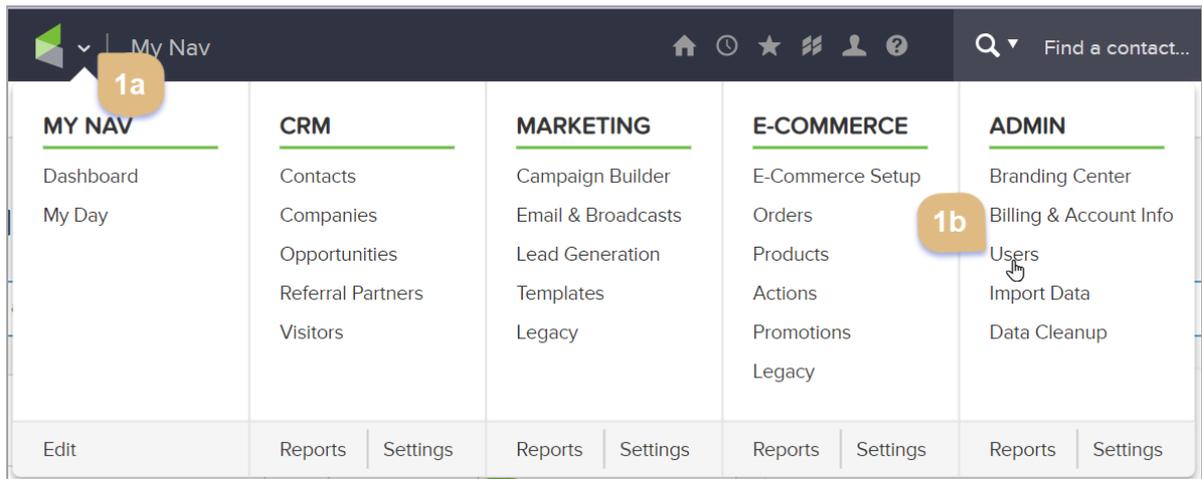


Add a User, Create User Account, or Deactivate a User

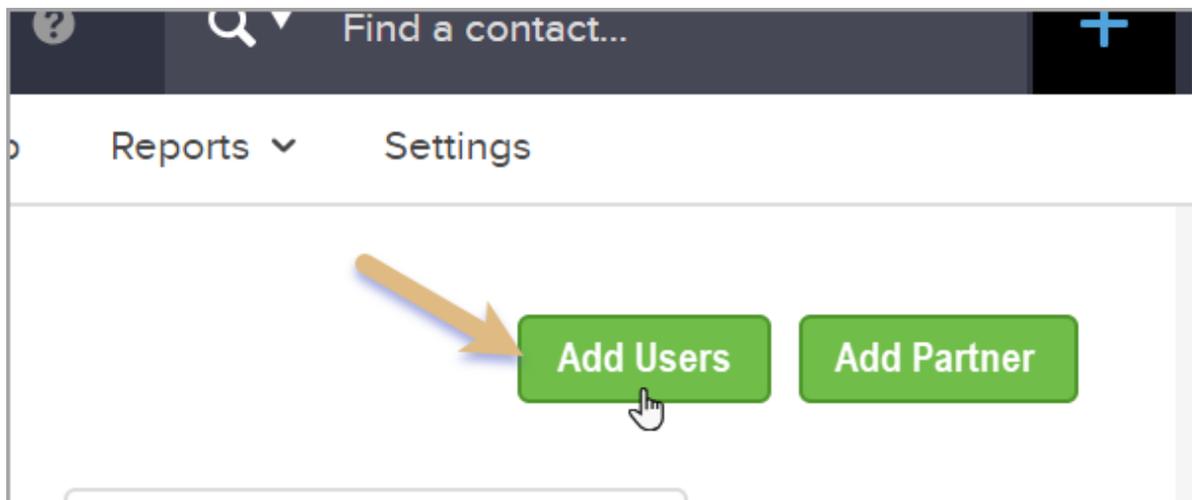
Learn how you add a User, how they create their account, or how you deactivate a User.

Add a New User

1. Go to **Admin > Users** in the main navigation menu



2. Click on **Add Users**

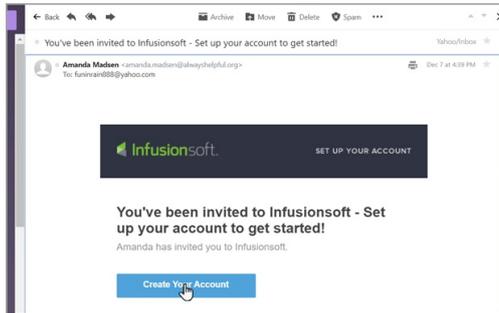


3. Enter their First Name, Email Address, and then click "Send Email Invitation" button.

Name	Email	Status
Nicole	funinrain888@yahoo.com	Invited (resend invitation)

Create Your Account

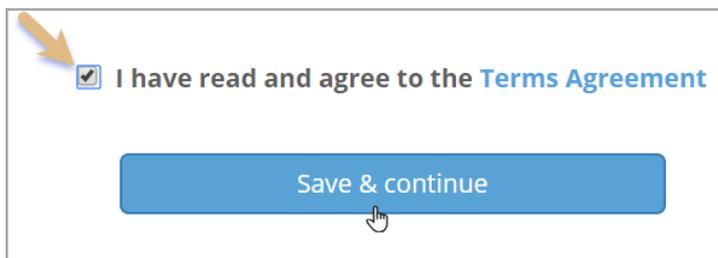
1. You will receive an invitation to create your profile
 - a. Click "Create an account"



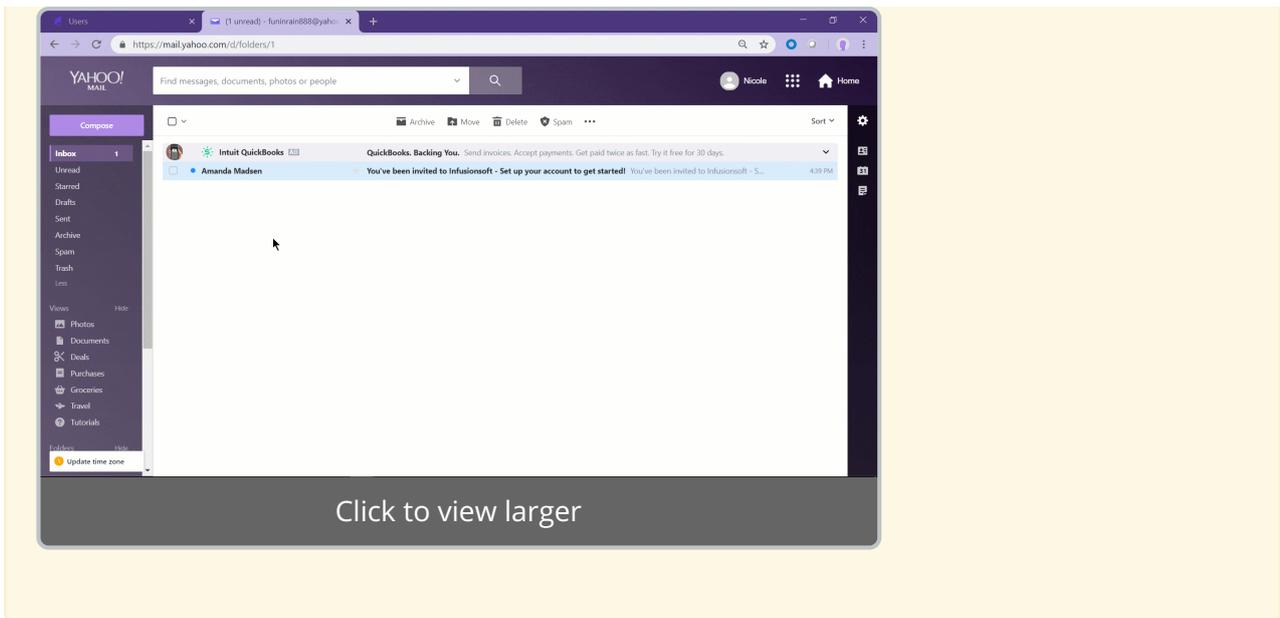
- b. Fill in the form

A screenshot of the Infusionsoft account creation form. The form has the Infusionsoft logo at the top, followed by the heading "Create your Infusionsoft ID". Below the heading is a sub-heading "Let Infusionsoft help you launch powerful strategies to grow your business." and a link "Already have an ID? Log in". The form contains four input fields: "First name", "Last name", "Email", and "Create password". There is a "Show" link next to the "Create password" field.

- c. Check the "Terms and Conditions"
 - d. Click "Save and Continue" to create your Infusionsoft ID



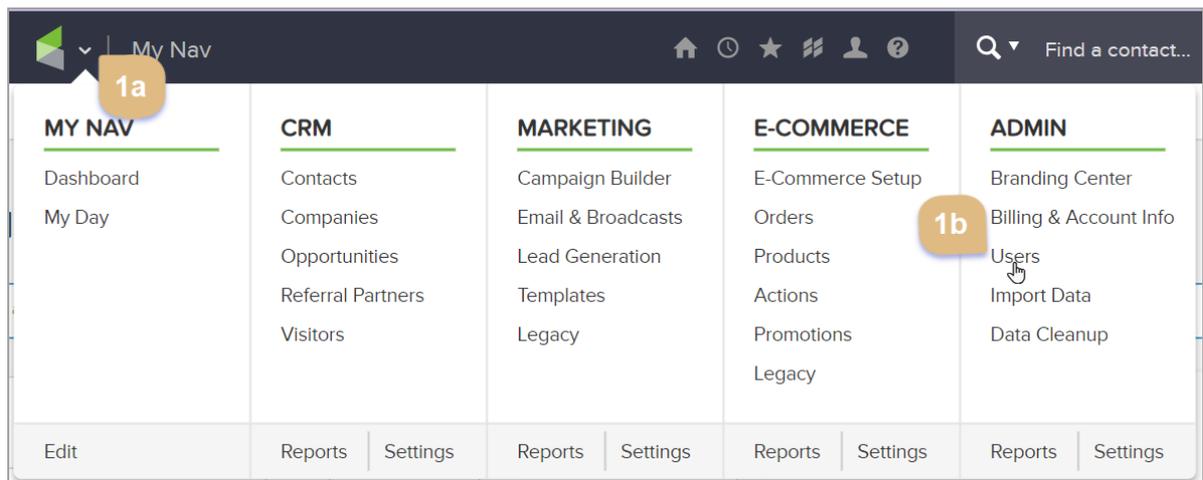
Note: If you already has an Infusionsoft ID, instead of filling in the form, click " Log in" next to "Already have an ID?", which will redirected you to the sign in page, where you will enter your Infusionsoft ID and password, as you normally would.



Deactivate a User

You aren't able to completely delete a User but here are the steps to deactivate them. You must be an Admin in order to deactivate a user. When a user is deactivated they will no longer have access to the account but their profile will remain under Admin > Users as "inactive".

1. Admin > Users



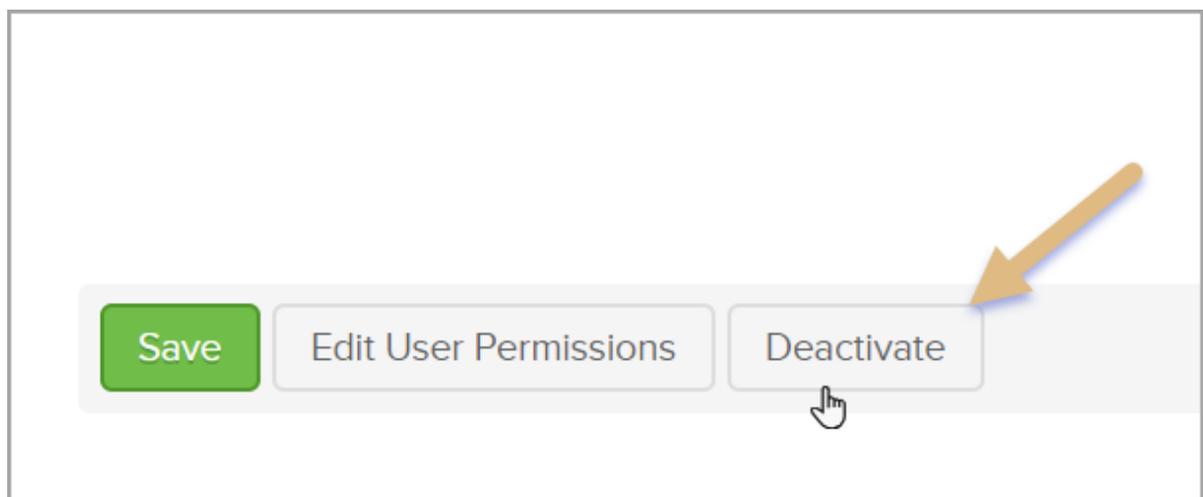
2. Click on the name of the user

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<input type="checkbox"/>	Id	Name	<u>Email</u>
<input type="checkbox"/>	32014	Alwayshelpful Support	Suppo
<input type="checkbox"/>	82226	Geraldine Vaughn P	Geralc

3. Scroll down the the bottom of the user record

4. Click the **Deactivate** button



Note: Once the ownership from the Deactivated User is reassigned it cannot be undone. In this situation manually reassign tasks.

User License

Deactivating a User will make a User license available. The only exception is when a Partner (Users with a blue P next to their name) is deactivated, since a Partner does not use a User license no User license will become available.

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<input type="checkbox"/>	Id	Name	<u>Email</u>
<input type="checkbox"/>	32014	Always helpful Support	Suppo
<input type="checkbox"/>	82226	Geraldine Vaughn 	Geralc

Reassign Ownership

What happens to the contacts, tasks, opportunities, and notes assigned to a Deactivated user?

When a User is deactivated the completed task will be removed. It will only ask who to assign the **PENDING** Tasks. However, notes will **not** be affected when a User is deactivated.

What happens if I reassign to the wrong User?

Make sure you are assigning to the correct User because once the action is processed there isn't a way to Undo. However, you can manually reassign to another User.

Video Walk through

