

Creating a User - Corporate Edition

1. Log in as an Admin to FaxAgent
2. Go to the Admin tab
3. Dropdown should say the name of the Company you are creating Users for (most of the time this will be your own company's name)
4. Select "Manage Users" from the list
5. And then select the red plus sign next to the "Select action..." drop down

The screenshot shows the FaxAgent Admin interface. At the top, there is a navigation bar with 'FAXAGENT' on the left and 'DASHBOARD', 'SEARCH', 'VIEW', 'SEND', 'SETTINGS', 'ADMIN', and 'LOGOUT' on the right. Below this is a 'TENANT' tab and an 'APPLICATION' dropdown menu. The 'APPLICATION' menu is open, showing a list of options: 'ABCo', 'Tenant Info', 'Manage Tenants', 'Company Settings', 'Permissions', 'Fax Settings', 'Advanced Settings', 'Manage Users', 'Routing Ownership', 'Routing Assignment', 'FaxBridge Ownership', 'FaxBridge Assignment', 'Account Code Ownership', 'Account Code Assignment', and 'Fax Usage Report'. The 'Manage Users' option is highlighted. To the right of the menu is a table with columns: 'Select action...', 'Username', 'Tenant', 'Active', 'Privil...', 'Display Name', 'C...', 'Email', 'R...', and 'User Id'. The table contains two rows of user data:

Select action...	Username	Tenant	Active	Privil...	Display Name	C...	Email	R...	User Id
<input type="checkbox"/>	ABCoUser1@ABCo	ABCo	X	user	ABCoUser1		ABCoUser1@example.com		2140411160538912017
<input type="checkbox"/>	admin@ABCo	ABCo	X	admin	admin		ABCo@Example.com		2140314183356912002

6. Complete the info for the new User

The screenshot shows the 'CREATE NEW USER' form in FaxAgent. The form is divided into two main sections: 'User Information' and 'Configuration and Settings'. The 'User Information' section contains the following fields:

- Username: UserBob@ABCo (with a note: 'username must be a valid email or end with: @ABCo')
- Password: NewPassword (with a note: 'password must be at least 6 characters and contain 1 digit, 1 uppercase, and 1 lowercase character')
- Display Name: Bob
- Email: Bob@example.com
- Phone: 888-555-1212
- Company Name: AB Co
- Integration Code: (empty)

The 'Configuration and Settings' section contains the following fields:

- Privilege Level: user
- Authenticate External: (checkbox, unchecked)
- Cover Page: CoverPage
- Billing Code: inherited
- Monthly Send Page Quota: 500
- Current Extra Pages: (empty)
- Apply Send Page Quotas: inherited (dropdown) and no (checkbox)

At the top right of the form, there are 'SAVE' and 'RESET' buttons.

- o User Information

- Username: This is used for the log in and must:
 - Be unique to the Tenant
 - Use either the Tenant Suffix (will display under the line) or the User's valid email address
 - Password: Must be at least 6 characters and contain 1 digit, 1 uppercase and 1 lowercase character
 - Display Name: Name that will display in the search fields
 - Email: Must be a valid email address for the User
 - Phone:
 - Company Name:
 - Integration Code: If this is needed it will be supplied by Axacore
- Configuration and Settings
 - Privilege Level: This can be set to
 - Admin
 - User
 - Support
 - Manager
 - Integration
 - Authenticate External: This is only to be used in conjunction with Active Directory
 - Cover Page: By selecting this field you are pre-selecting the cover page for this User
 - Billing Code: If your company uses Billing codes it can be set here
 - Inherited
 - This will be inherited from the Parent Tenant
 - User Set
 - This allows you to define a billing code for this particular User
 - Monthly Send Page Quota: Allows you to set the User quota here
 - Current Extra Pages: Allows you to set up Extra Pages from here
 - Most will not use this feature
 - Apply Send Page Quotas:
 - Inherited
 - This will be inherited from the Parent Tenant
 - User Set
 - This will allow you to turn off or on quota restriction
 - Yes = Quota restrictions are turned on
 - No = Quota restrictions are turned off

7. When completed click Save

8. Select the refresh button in the top left hand corner

9. The User will now show in the Manage Users list will now show in the Manage Users list