



# User Management

Create, edit, and manage all platform users. At ACME Creative Agency, this page shows every team member — designers, account managers, and admins — with their role, login status, and two-factor authentication at a glance.

## Key Features

- **Company Drill-Down:** Uber admins open to a list of all companies — click any row (e.g. ACME Creative Agency) to view its users, then use ← **Back** to return
- **User List:** Name, company, email, phone, category, level, status, and MFA indicators for every account
- **Search & Filter:** Search by name, email, or company — filter by category, level, or status
- **Add New User:** Create accounts with contact details, access settings, and MFA options (uber admins only)
- **Edit User:** Update any user's profile, permissions, status, and security settings

- **Toggle Status:** Activate or suspend individual accounts with one click
- **Batch Actions:** Activate, suspend, or delete multiple users at once
- **View As User:** See the platform exactly as another user does (uber admins only)
- **Role Templates:** Create and configure permission templates per page (uber admins only)
- **Per-company Permissions:** Assign different role templates to each of a user's companies individually

## How to Use

### Adding a User

1. Click **Add New User** in the top right (uber admins only)
2. Enter name and email (required); optionally add company, phone, and address — use **Search Address** for Google Places autocomplete
3. Set **Category**, **Level**, and **Status**
4. Enable MFA methods as needed: Email, SMS, or Google Authenticator
5. Click **Save Changes**

### Editing a User

1. Click **Edit** on any user row
2. Update fields as needed
3. The right panel lists all companies for that user — use the dropdown next to each company to assign a role template
4. Click **Save Changes**

### Changing Status and Deleting Users

- Click **Toggle Status** on a row to switch Active ↔ Suspended
- Use checkboxes and the batch menu to **Activate**, **Suspend**, or **Delete** multiple users at once
- You cannot change status or delete your own account

### Viewing the Platform as Another User

Click **View As** on any row (uber admins only). The platform reloads as that user's view — useful for checking permissions or troubleshooting access. Return to your admin view from this page.

## Managing Role Templates

1. Click the **Role Templates** tab (uber admins only)
2. Click any template card to edit its permissions — toggle **View**, **Edit**, **Delete**, and **Export** per page, then click **Save Changes**
3. Click **Create Template** to add a custom template (name, description, plan tier)
4. Click the delete icon to remove a custom template (must be unassigned from all companies first; system templates cannot be deleted)

## User Categories & Levels

**Categories** control which modules a user can access: **Uber** (full platform), **DAM Client**, **CRM Client**, **Guest**.

**Levels** control what they can do: **Admin** (full control), **Editor** (create and edit), **User** (read and limited interaction).

## Tips

- Use the **Status** filter to quickly find all suspended or new accounts
- The MFA column shows two-factor authentication status at a glance
- Assign different role templates per company for fine-grained, company-level access control
- Batch actions automatically skip your own account — you can't accidentally suspend or delete yourself
- Enabling Edit, Delete, or Export on a template page automatically enables View as well