

Managing Users

Users are individuals who can access boberdoo as Admin users, such as employees who help manage the lead business.

Step 1

Go to the Settings tab and then select the Manage Users subtab.

Step 2

Edit a User profile to manage the following:

User Name

User Login

Change Password

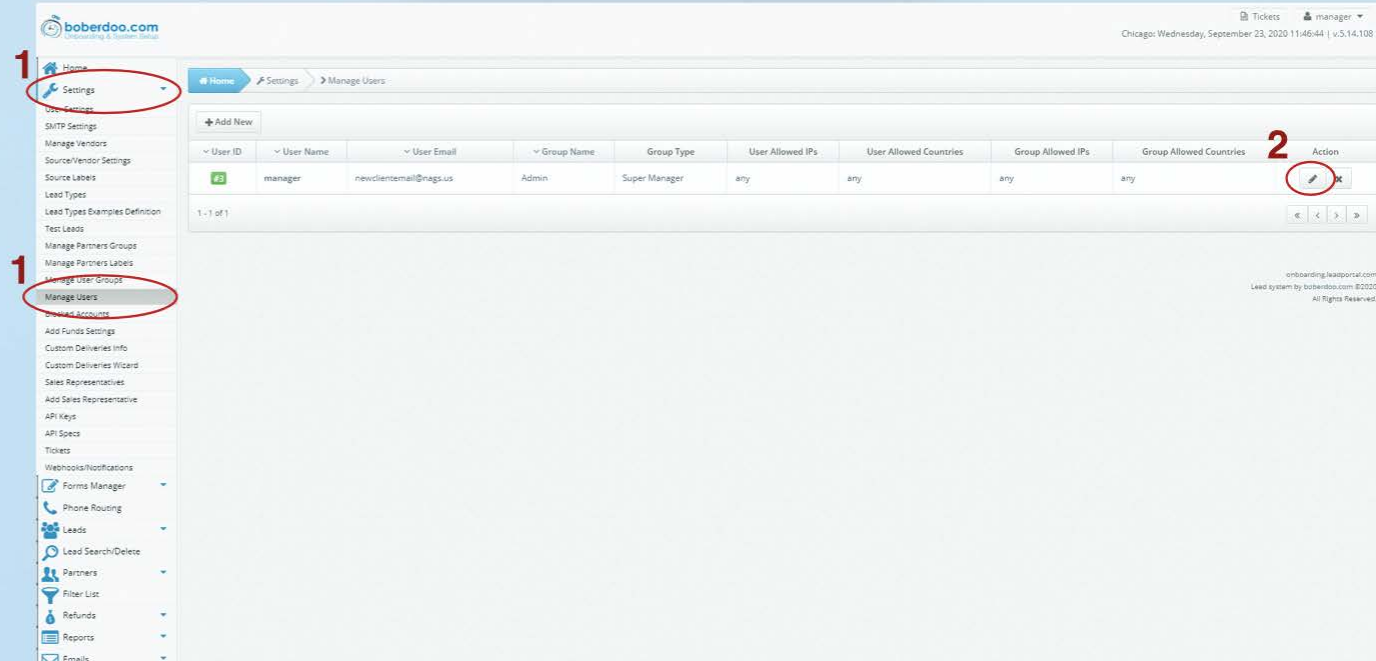
User Email


Cell Phone

Group Name

All IP Addresses Allowed

All Countries Allowed



User ID	User Name	User Email	Group Name	Group Type	User Allowed IPs	User Allowed Countries	Group Allowed IPs	Group Allowed Countries	Action
12	manager	newclientemail@nags.us	Admin	Super Manager	any	any	any	any	

Step 3

Please change the temporary password to your personal password.



Be advised that creating a backup user account is beneficial if the primary password is forgotten or too many failed login attempts lock the account. The backup is one way to gain access to the system.

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Change Password

The temporary password provided when the system was built **MUST BE CHANGED**.

Step 1

Select Change Password.

Step 2

Enter new password and confirm.

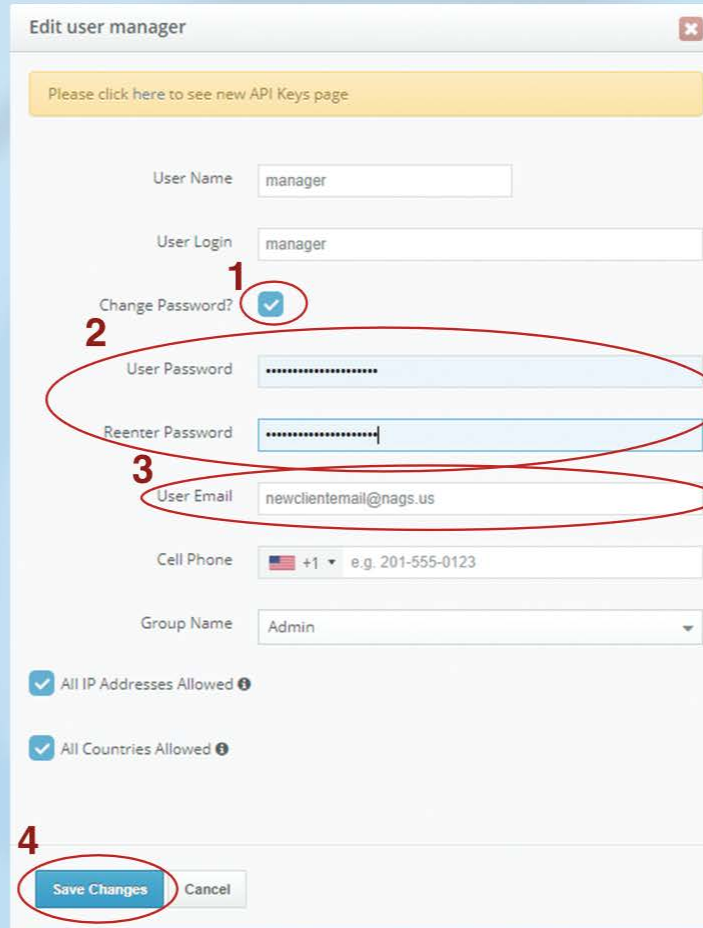
Step 3

Designate an email address for notifications such as tickets updates, lead transactions, etc.

Step 4

Click Save to save the new password. Please protect the new password in the same manner as a bank account pin.

Please see the Compliance section for more details about data security and setting up two factor authentication (2FA) to keep your system compliant with industry standards.



The screenshot shows the 'Edit user manager' form with the following fields and annotations:

- 1**: A red circle around the 'Change Password?' checkbox, which is checked.
- 2**: A red oval around the 'User Password' and 'Reenter Password' fields, both containing masked characters.
- 3**: A red oval around the 'User Email' field, which contains 'newclientemail@nags.us'.
- 4**: A red circle around the 'Save Changes' button.

Other visible fields include: User Name (manager), User Login (manager), Cell Phone (+1 e.g. 201-555-0123), and Group Name (Admin). There are also two checked options: 'All IP Addresses Allowed' and 'All Countries Allowed'.

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Create New Users

Additional user accounts can be created so that individuals have dedicated, secure access to the system.

Step 1

In the Settings tab, select the Manage Users sub-tab.

Step 2

Create a User profile to set up:

User Name

User Login

User Password

User Email

Cell Phone

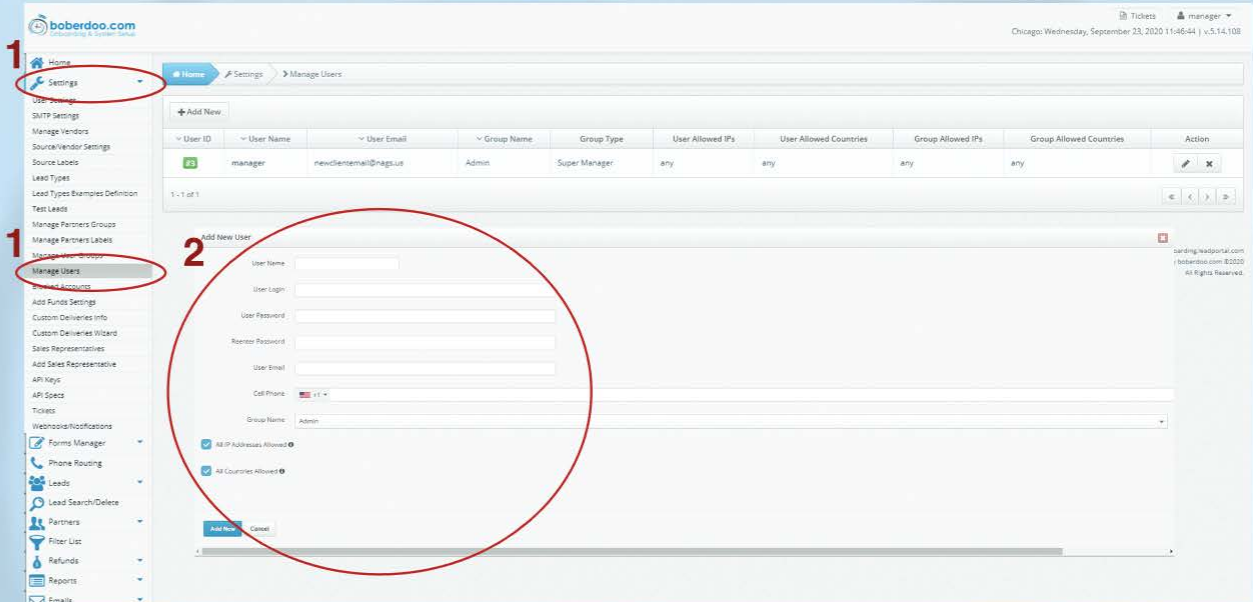
Group Name

All IP Addresses Allowed

All Countries Allowed



Users can be assigned to a different "Groups" with different permissions.



User ID	User Name	User Email	Group Name	Group Type	User Allowed IPs	User Allowed Countries	Group Allowed IPs	Group Allowed Countries	Action
15	manager	newclientemail@nags.us	Admin	Super Manager	any	any	any	any	

Related Links



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Manage User Groups

User Groups allows managing permissions for groups of users.

Step 1

In Settings select the Manage User Groups sub tab.

Step 2

Click Add New to create a new group.

Step 3

Edit the group profile to manage:

Group Name

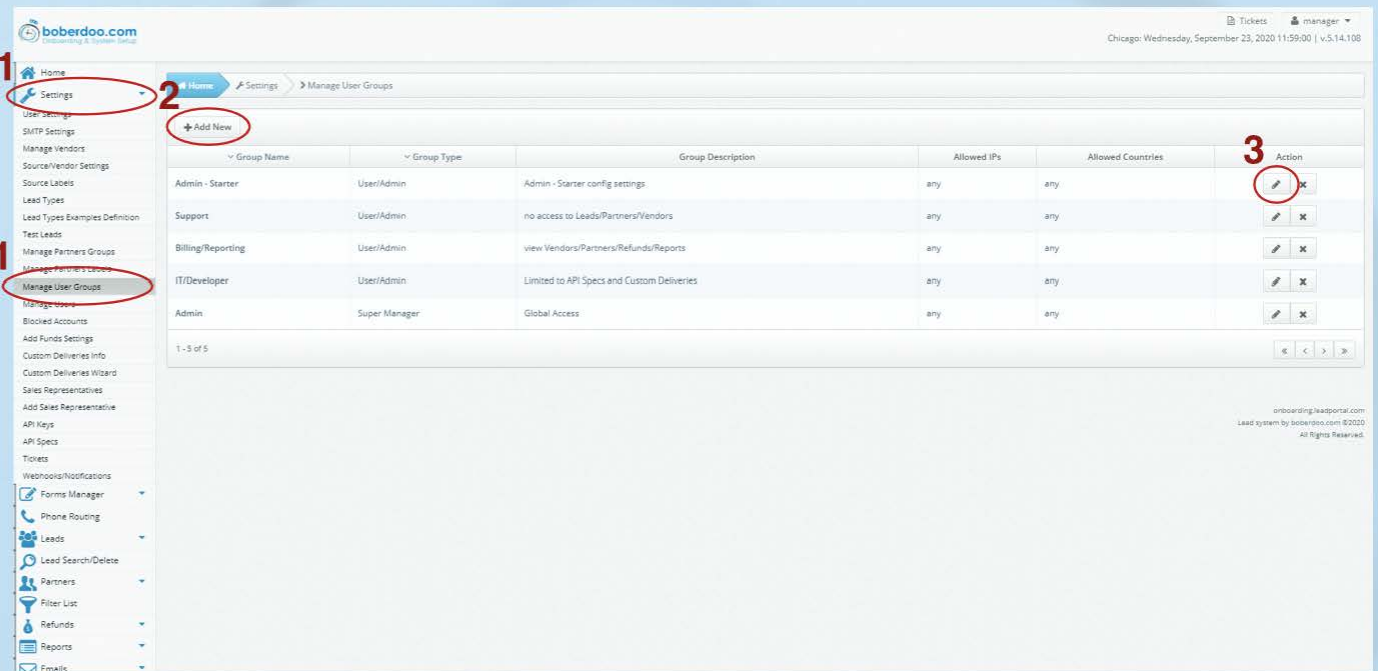
Group Type

Group Description

Global Access

All IP Addresses Allowed











All Countries Allowed



1 Settings

2 Add New

3 Action

Group Name	Group Type	Group Description	Allowed IPs	Allowed Countries	Action
Admin - Starter	User/Admin	Admin - Starter config settings	any	any	 
Support	User/Admin	no access to Leads/Partners/Vendors	any	any	 
Billing/Reporting	User/Admin	view Vendors/Partners/Refunds/Reports	any	any	 
IT/Developer	User/Admin	Limited to API Specs and Custom Deliveries	any	any	 
Admin	Super Manager	Global Access	any	any	 

1 Manage User Groups

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User Group Permissions

The Permissions section enables pages in the system to be accessible for specific groups of users.

Step 1

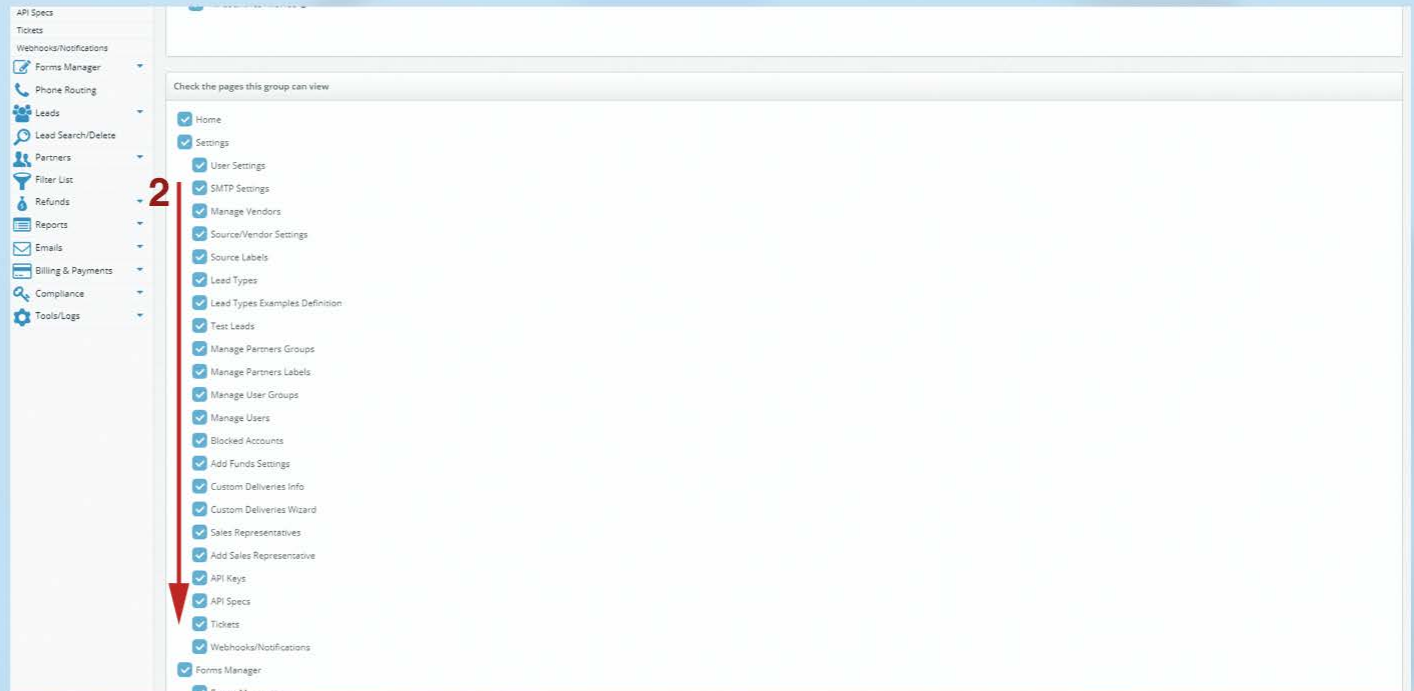
Enter the edit mode for the user group.

Step 2

Scroll down to view permissions options.

Step 3

Select the pages using the toggle checkboxes.



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