

ESTICOM

User Management Guide

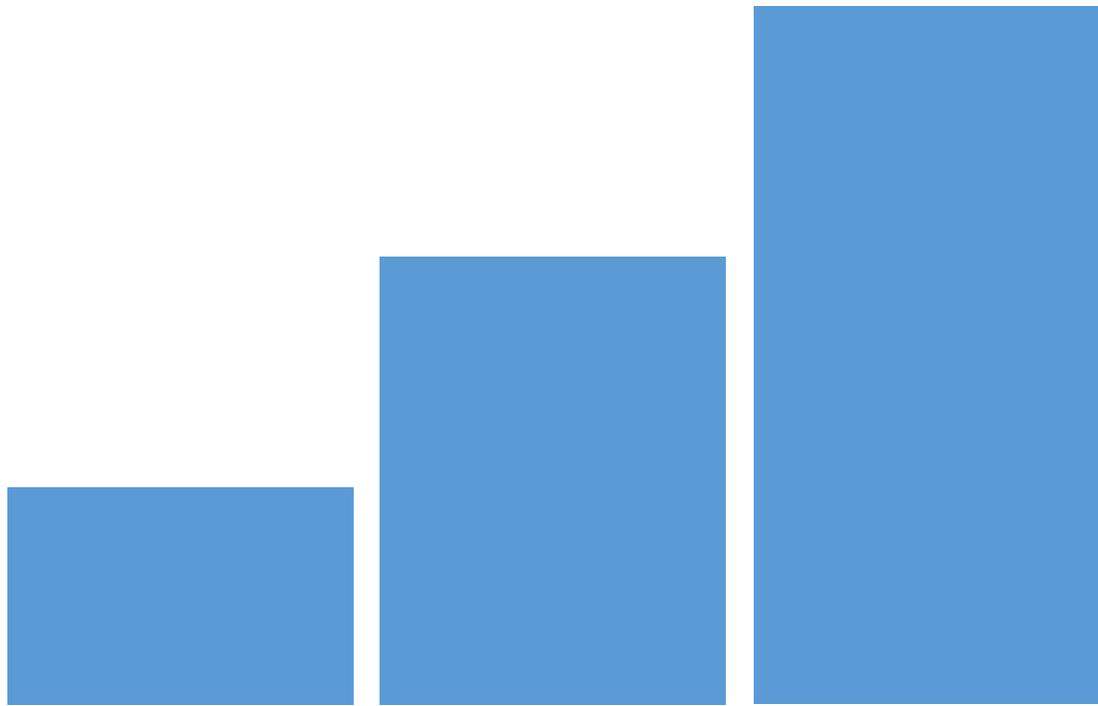


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Overview

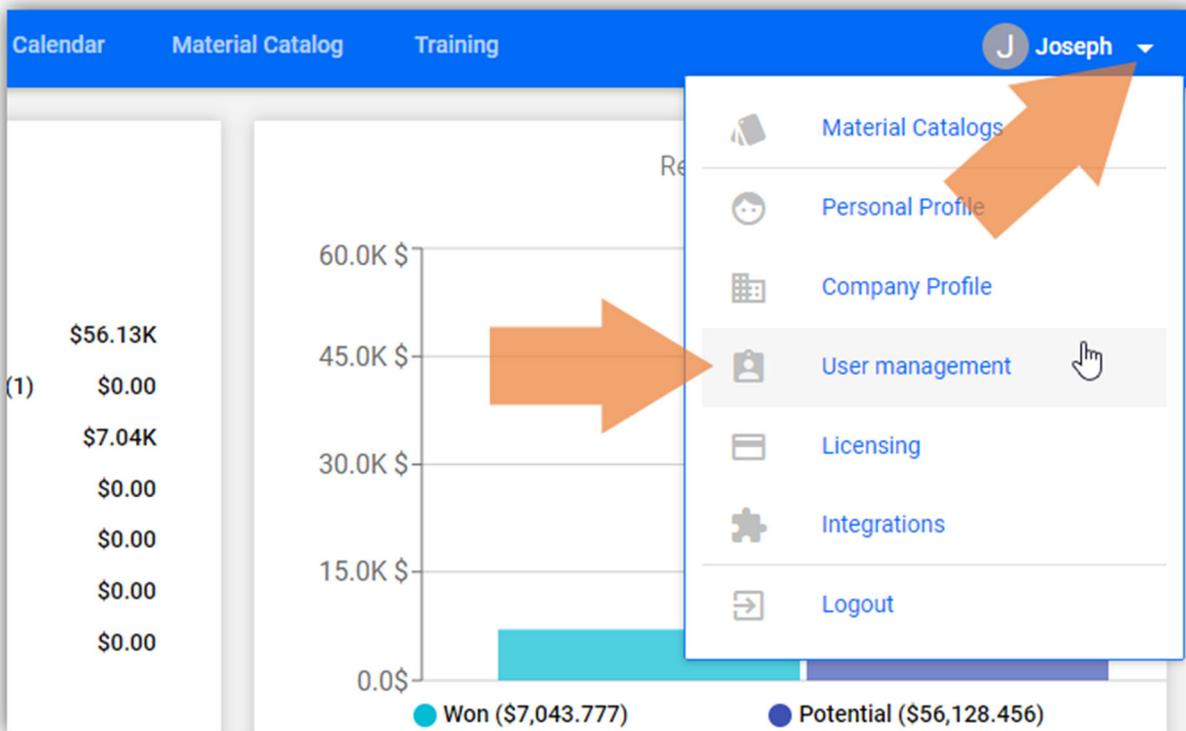
The User Management Guide is designed to provide a brief overview of the user management feature. This feature enables you to manage users' access and roles allowing you to control and organize your team. In this document, you will learn the following:

- [Invite Users](#)
- [Update User Roles](#)
- [Delete User Invitation](#)
- [Disable Users](#)
- [Enable Users](#)
- [Accepting the Invitation for New Users](#)

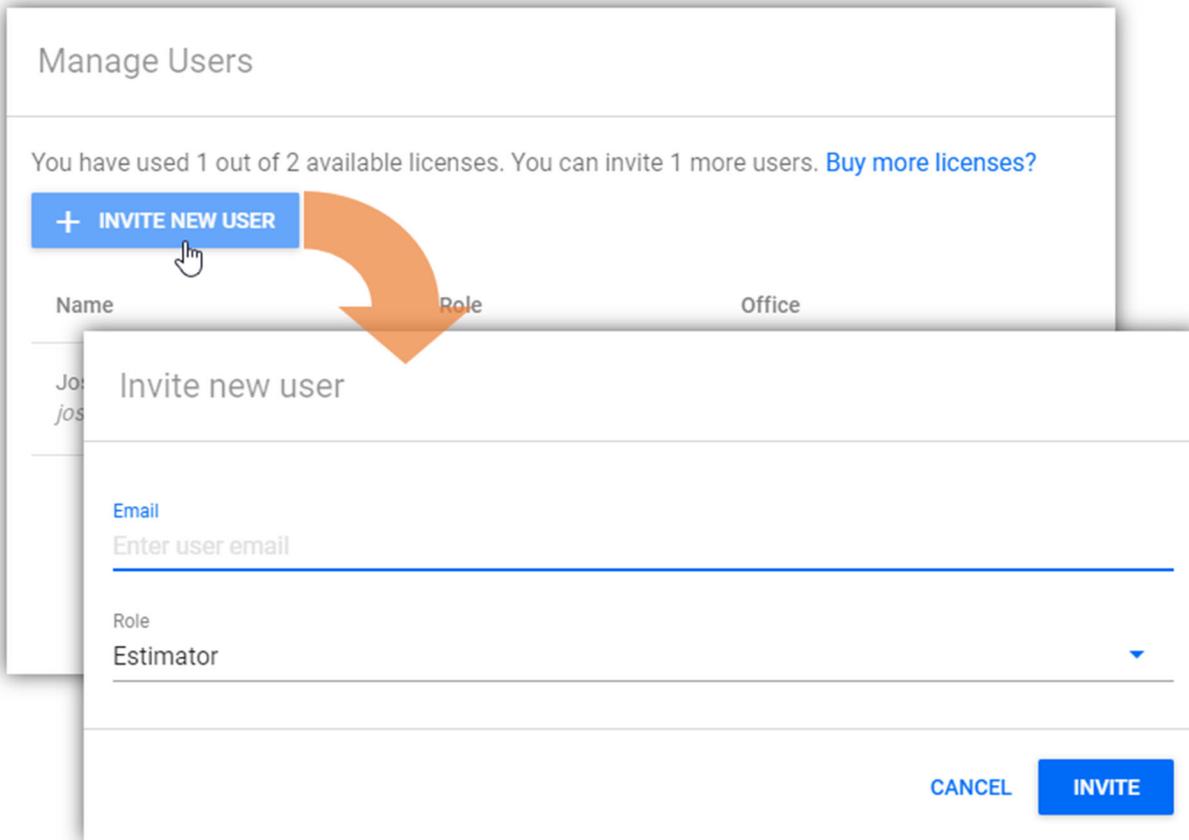
Invite Users to Join your Team

Build your team by adding users with specific roles and pre-set access to features and functions. In this section, you will learn how to invite new users to join your team. It is important to determine the appropriate role of each user as roles define the user's access to features and functions.

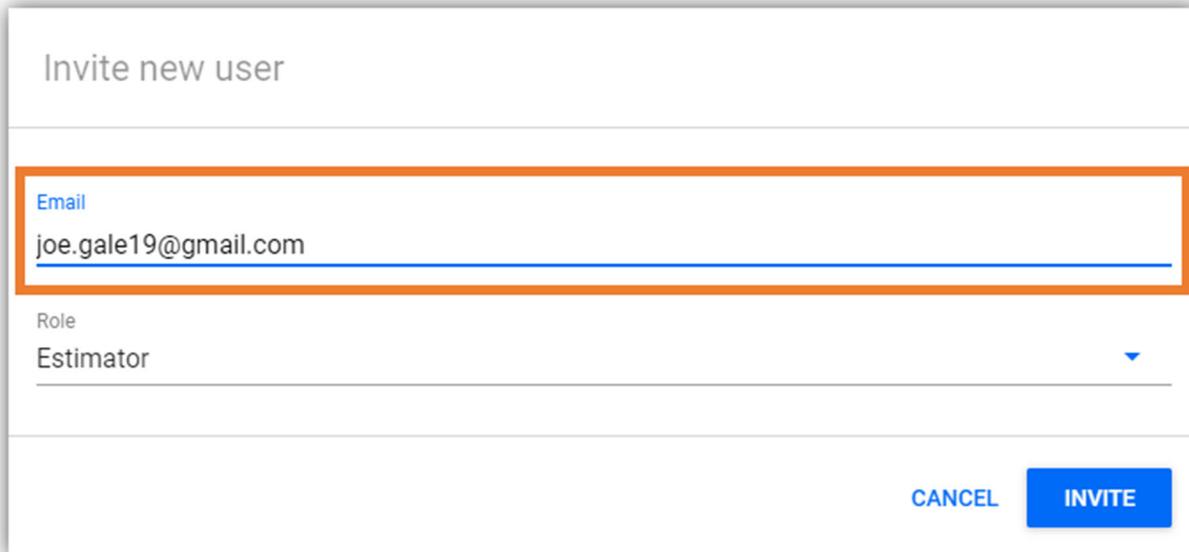
1. Click the **Account Menu** and select **User Management**.
 - a. The **Manage Users** window will appear.



2. Click the **+ INVITE NEW USER** button.
 - a. The **Invite new user** window opens.



3. In the **Email** field, enter the user's email address.



4. In the **Role** field, click the drop-down arrow to select the appropriate user role:

Invite new user

Email
joe.gale19@gmail.com

- Administrator
- Limited Estimator
- Manager
- Sales
- Estimator
- Field Personnel

User Role	Description
Administrator	All permissions except modification of billing info.
Limited Estimator	Users with this role can only view projects assigned to them can reassign projects to other users. They are restricted from editing catalog
Manager	Users with this role can view all projects and reassign users to these projects.
Sales	Users with this role can create new projects and upload plans, however, they only have View-Only access to Takeoff and Estimating.
Estimator	Users with this role can view all projects. They can also assign projects to other users.
Field Personnel	Users with this role can add notes/tasks to a project or takeoff.

5. Click the **INVITE** button to send the email invitation.

Invite new user

Email
joe.gale19@gmail.com

Role
Administrator

CANCEL INVITE

Update User Roles

In this section, you will learn how to update user roles. This option allows you to change user roles through User Management with ease. Updating user roles will determine which features and functions the user can access or take actions on.

1. Click the **Account Menu** and select **User Management**.
 - a. The **Manage Users** window will appear.

Calendar Material Catalog Training J Joseph

Material Catalogs

Personal Profile

Company Profile

User management

Licensing

Integrations

Logout

60.0K \$

45.0K \$

30.0K \$

15.0K \$

0.0K \$

56.13K

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\$7.04K

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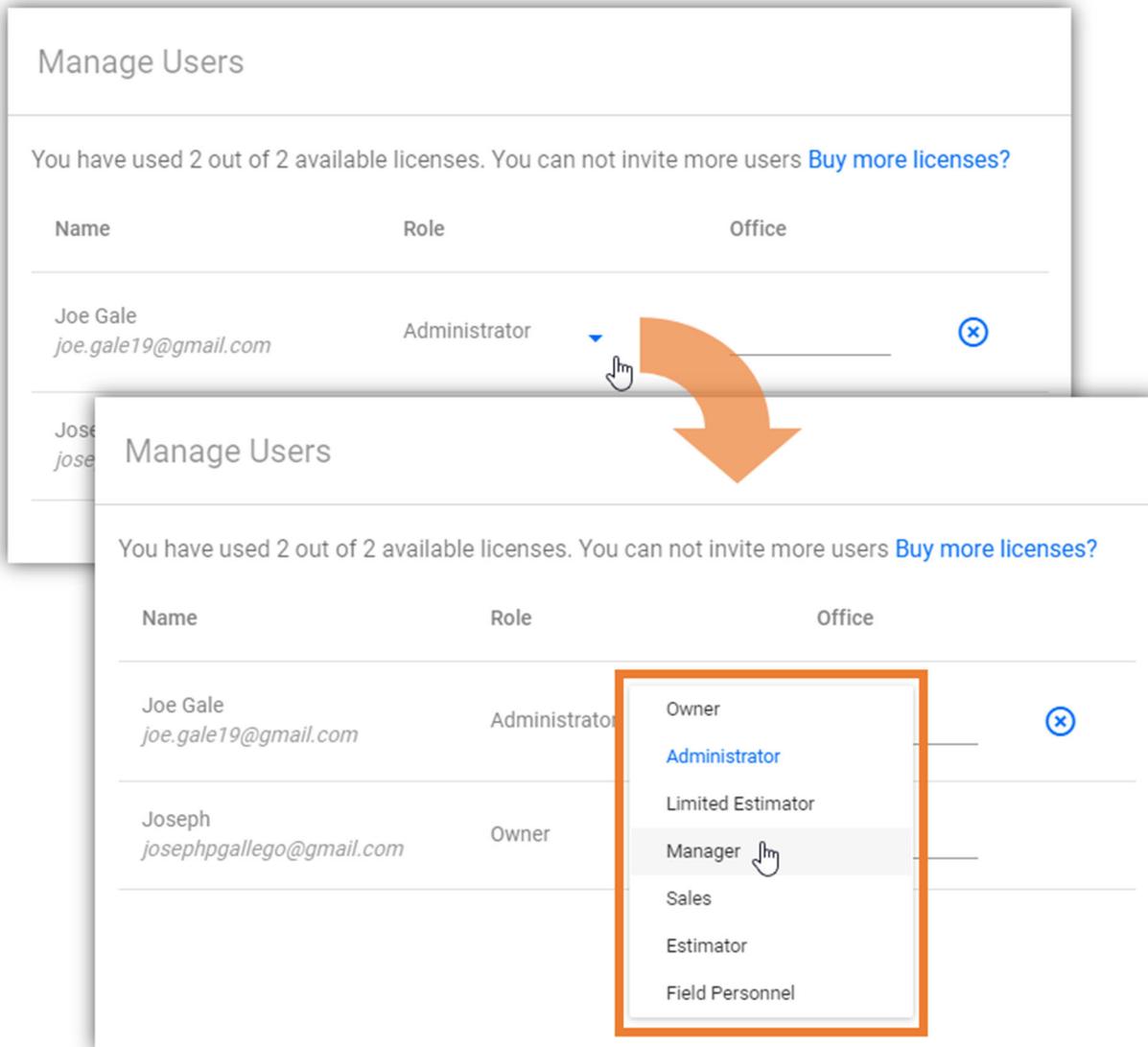
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● Won (\$7,043.777) ● Potential (\$56,128.456)

2. In the **Users** list, find the user that you want to update.

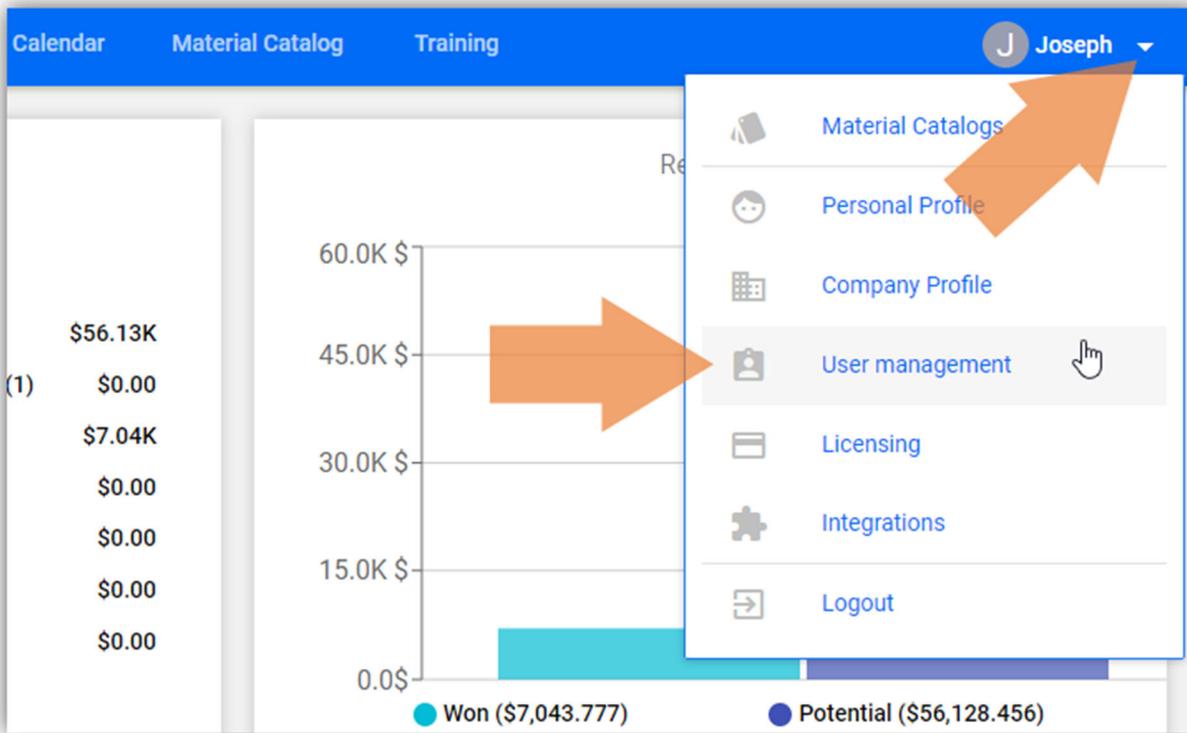


3. On the **User's Role** column, click the drop-down arrow and select the user's role.
 - a. The user's role will be updated after selecting a role from the menu.

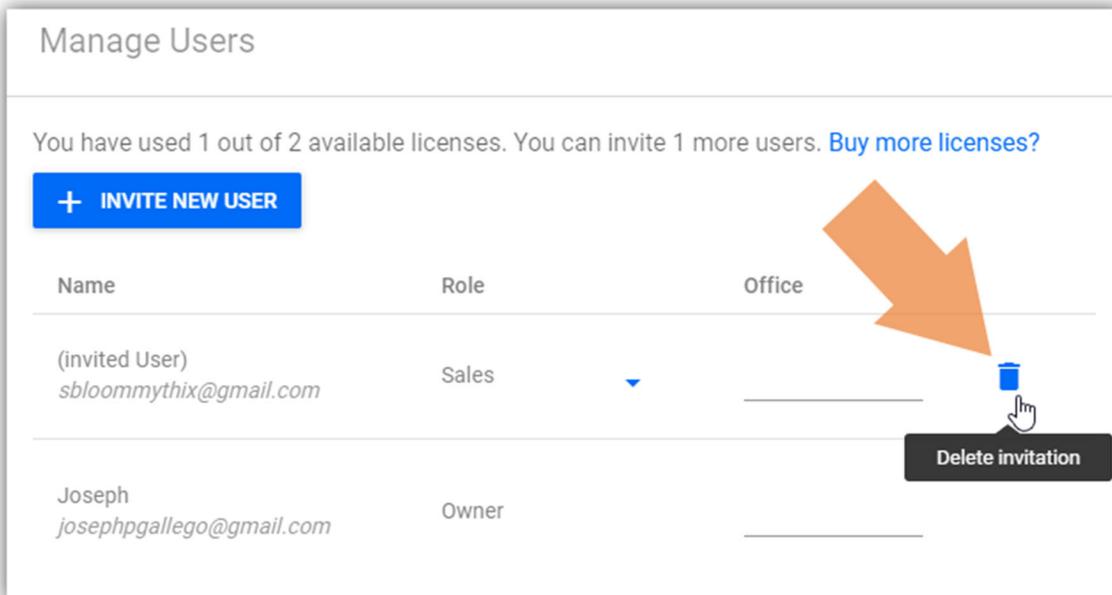
Delete User Invitation

In this section, you will learn how to delete a user invitation that is already sent out. This action enables you to remove inactive invitations allowing you to invite other users.

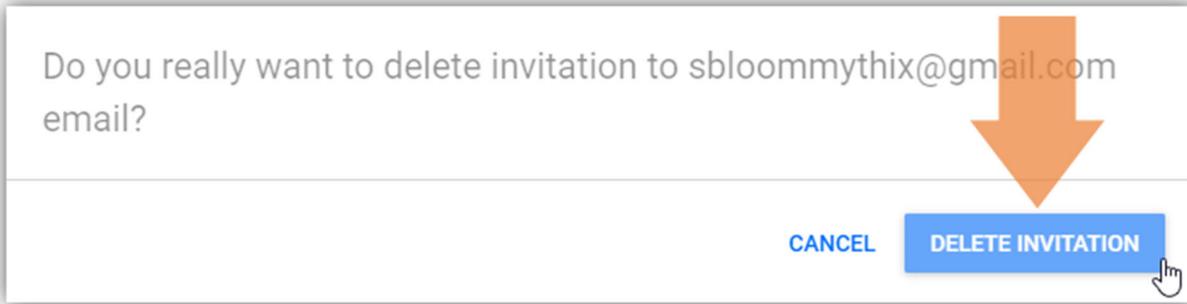
1. Click the **Account Menu** and select **User Management**.
 - a. The **Manage Users** window will appear.



2. In the **Users** list, find the invitation that you want to delete and click its **Delete Invitation** icon.
 - a. A **Confirmation** dialog box will appear.



3. Click the **DELETE INVITATION** button to continue deleting the invitation.

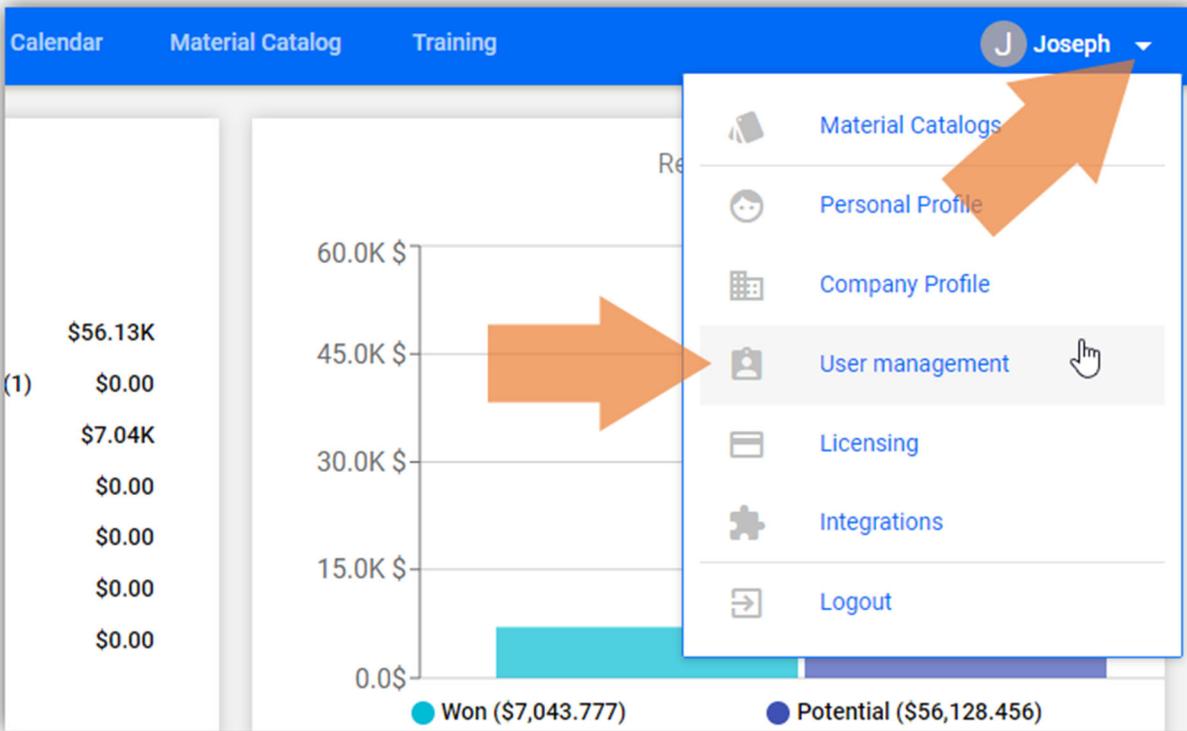


Disable Users

In this section, you will learn how to disable users. The User Management feature presently restricts user deletion. As an alternative to removing user's access by deleting them, you can disable users. Disabled users will still appear on the list with Strikethrough details indicating that they are disabled. If you wish to reinstate the users, you can re-enable them. See [Enable Users](#) for more information.

It is worth noting that when you disable a user, it frees up a license allowing you to add another user.

1. Click the **Account Menu** and select **User Management**.
 - a. The **Manage Users** window will appear.



2. In the **Users** list, find the user that you want to disable and click its **Disable User (X)** icon.

- a. **Important Note:** Ensure that you disable the correct user as there are no confirmation options and the selected user will be disabled immediately.

Manage Users

You have used 2 out of 2 available licenses. You can not invite more users [Buy more licenses?](#)

Name	Role	Office
Joe Gale <i>joe.gale19@gmail.com</i>	Administrator	
Joseph		

Disable user

Manage Users

You have used 1 out of 2 available licenses. You can invite 1 more users. [Buy more licenses?](#)

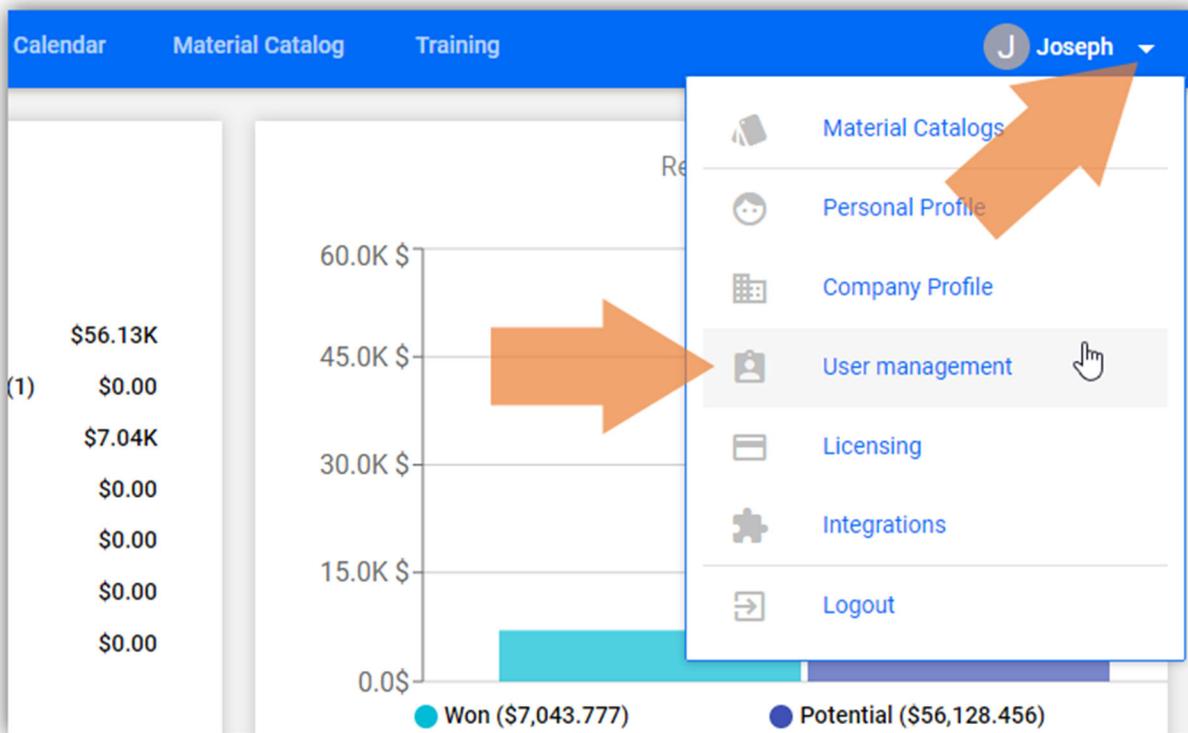
[+ INVITE NEW USER](#)

Name	Role	Office
Joe Gale <i>joe.gale19@gmail.com</i>	Administrator	✓
Joseph <i>josephpgallego@gmail.com</i>	Owner	

Enable Users

In this section, you will learn how to enable users. This action lets you re-enable users that you disabled reinstating their access, features, and functions.

1. Click the **Account Menu** and select **User Management**.
 - a. The **Manage Users** window will appear.



2. In the **Users** list, find the user that you want to enable and click its **Enable User** (Check) icon.

Manage Users

You have used 1 out of 2 available licenses. You can invite 1 more users. [Buy more licenses?](#)

+ INVITE NEW USER

Name	Role	Office
Joe Gale <i>joe.gale19@gmail.com</i>	Administrator	
Joseph	Owner	

Manage Users

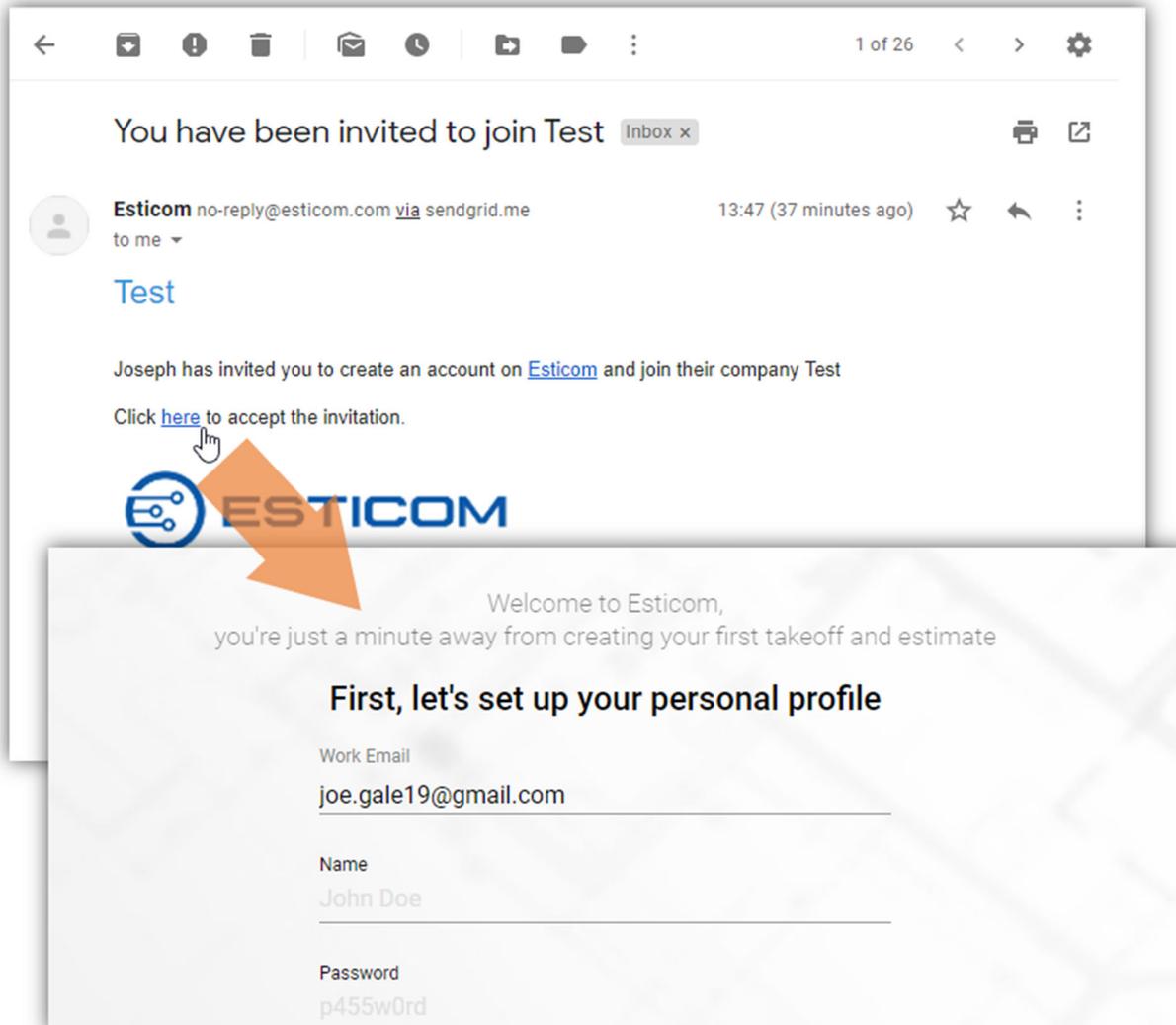
You have used 2 out of 2 available licenses. You can not invite more users [Buy more licenses?](#)

Name	Role	Office
Joe Gale <i>joe.gale19@gmail.com</i>	Administrator	
Joseph <i>josephpgallego@gmail.com</i>	Owner	

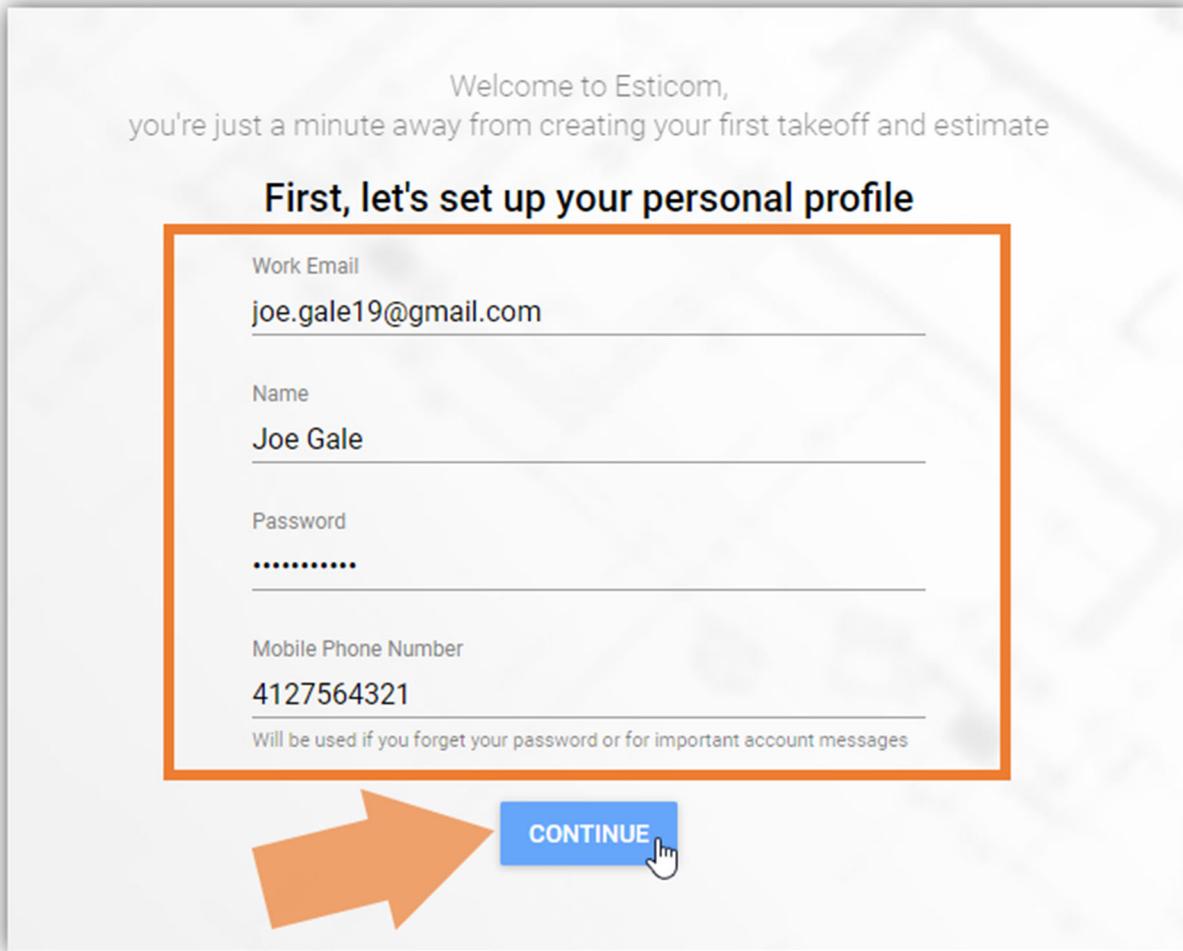
Accepting Esticom Invitation for New Users

In this section, you will learn how to accept Esticom Invitations and create an account to join the team. This section is created to demonstrate how an invited user can start their Esticom account and join the team. Help new teammates by providing them quick steps on how to completely accept the invitation.

1. Open your **Email** and check for the **Esticom Invitation** email.



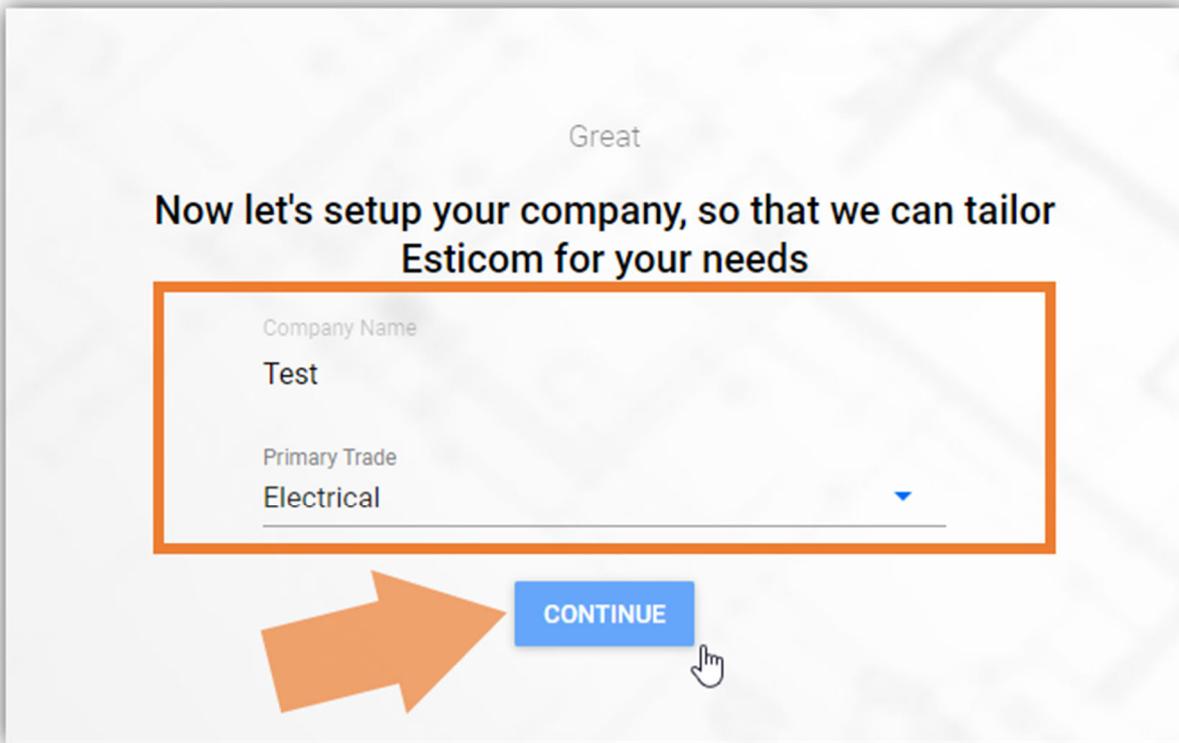
2. Open the **Email Invitation** and click the **here** link to accept the invitation.
 - a. You will be directed to the **Esticom's Registration** page.
3. Specify your personal profile details:



Field	Instructions
Work Email	By default, your email address will appear in the Work Email field. To change your preferred work email, update the field by entering a different email address.
Name	Enter your full name.
Password	Enter your preferred password.
Mobile Phone Number	Enter your mobile phone number.

4. After specifying the required information, click **CONTINUE**.
 - a. The **Company Set Up** page opens.

5. By default, the **Company Name** is disabled.
6. In the **Primary Trade** field, click the drop-down arrow to select the appropriate trade/industry.



7. Click **CONTINUE** to proceed.
 - a. You will be directed to your team's **Projects** page. Depending on your role, you will have access to features and functions that you are authorized with.

