User management and seats

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In order for a user to enjoy full functionality of a OnceHub feature, they must be assigned a seat. For instance, a licensed user of scheduled meetings can be defined as owner of an enabled booking page in OnceHub and receive bookings.

Please note they can still use all other functionality in OnceHub and within all products without a seat.

As your team changes, you can add or remove seats as you need them.

User management

Introduction to user management

OnceHub is a true multi-user system, designed to meet the scheduling needs of large and small organizations.

To manage users in your account, in the top navigation menu, click the gear icon → **Users**.

Users						?
Filter by User name or email			Licenses assigned: 3/100 | 2/100 (Add Licenses)			Add users
Users ∨	**Role**	**Integrations**		**Licenses**	**Status**	
Jeevan Jones JeeJones@gmail.com	Administrator	31 💬 🔵 ☀		📅 🎥	Has signed in	•••
Robert Frost RobFrost@gmail.com	Member			📅 🎥	Has signed in	•••
Tony Kurz TonyKurz@gmail.com	Member			📅 🎥	Has signed in	•••

Figure 1: Users lobby

User types

You can create three types of users: administrators, team managers, and members. Here's a summary, but you can learn more about the differences in this article.

- Administrator: The administrator has complete access to nearly all functions and data in the OnceHub account. They manage users, account settings, access permissions, and more; they can also use all of the OnceHub tools.
- Team manager: The team manager plays a role somewhere in between an administrator and member: They have access to most functionalities in the account, with restricted access to sensitive areas like customer data. Once they are assigned a team, they can create scheduling pages on behalf of their team members, as well as edit aspects of their team members' profile and scheduling settings.
- Member: A member has limited access to the account settings and data, but can control most of their own profile settings. Usually, they only create scheduling tools for their own use, and not for other members in the team.

Once you've created the user, you can determine whether or not they need a seat.

Managing users

As a OnceHub administrator, you can perform various actions to manage users in your OnceHub Account:

- Add new users: administrators can invite new users to join their organization's OnceHub Account. New users will receive an email invitation with a sign-in link. New users can be administrators or members.
- Edit existing users: You can edit the personal details of other users and assign or unassign seats from their profile. You can also edit email notification settings, date and time settings, and product-specific settings for all users in the OnceHub Account.
- Delete users: You can delete any users with an assigned seat, apart from the last administrator with an assigned seat.

When you have a paid subscription, at least one seat must be assigned to an administrator.

> ⓘ **Note:**
>
> When deleting a user, all booking pages owned by the user will automatically be transferred to the remaining OnceHub administrator.
>
> When unassigning a scheduled meetings user seat, all booking pages owned by the user will automatically be disabled.

Adding users

OnceHub is a multi-user system, designed to meet the scheduling needs of large and small organizations. All OnceHub products share centralized user management, permissions, and security settings in your account.

You must be a OnceHub administrator to add new users.

1. Sign in to your OnceHub account.
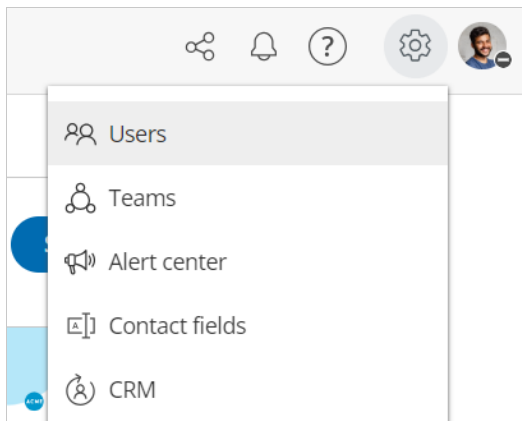2. In the top navigation bar, click the gear icon → **Users**.

Figure 1: Users page

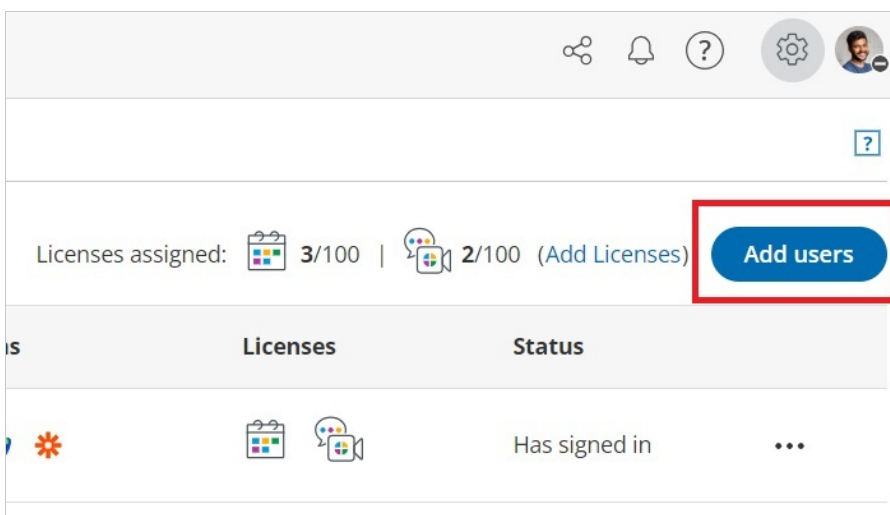3. In the Users lobby, click the **Add Users** button (Figure 2).

Figure 2: Add users

4. In the **Add Users** pop-up (Figure 3), type the new user's email address. This is the email address to which the invitation will be sent. The selected email address will also be used by the user to sign in.

Figure 3: Add Users

5. Add the user's name. Include their first and last names.

6. Select the **User role**: administrator, team manager, or member. Note that the user's role can always be updated by clicking on the user's profile in the Users tab.

7. Add any additional users through the same method by clicking the **+ Add User** link below the email address field.

8. Click **Next**.

9. Select which users need to be assigned a seat. Once you're satisfied with the assignment, click **Next**. Note that if you don't have any available seats, you can skip this step.

10. In the **Resource pools and teams** step, select any resource pools and/or teams you want this user to be a part of. Note that if the user/s have been assigned as team managers, they will be the team managers of those teams.

11. Review the Confirmation page (Figure 4), which specifies how many users you'll be adding and how many seats you'll be assigning..
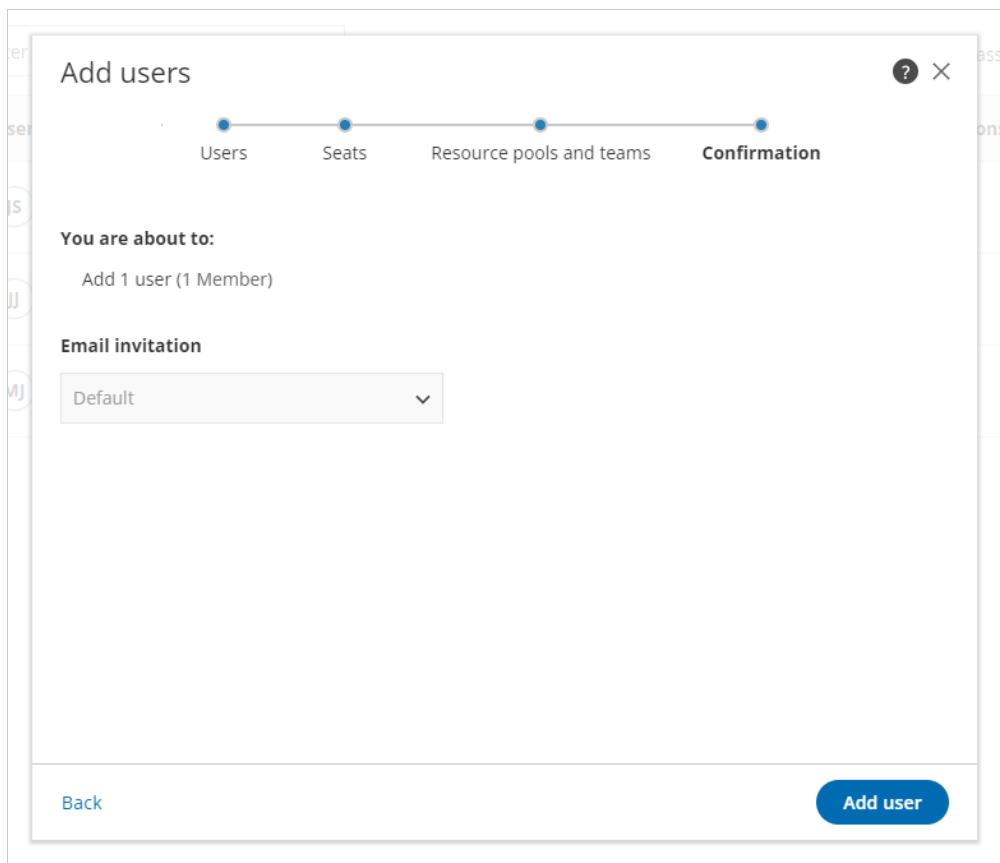
Figure 4: Confirmation

If you've customized an email invitation template in the Notification templates editor, you can select the custom template of your choice in the dropdown. You can either create your own invitation template from scratch, or you can simply tweak the default template by changing the wording a bit, adding a logo and changing anything else you wish to.

If you haven't customized a template, this option will be greyed out and OnceHub will send the invite using the default template.

1. To adjust your users or their seat assignment, click **Back**. If you'd like to proceed with adding the user(s), click **Add Users**.
2. OnceHub sends an email invitation to the invited user(s). When a new user clicks the invitation link in the email, they will be taken to the OnceHub sign-in page where they can set their own password. They must click the invitation link within 24 hours or it will expire. The admin can resend the email invitation by clicking Resend invitation next to the user's name on the users page. This will reset the 24-hour expiration period.

> ⓘ **Note:**
>
> Whenever you add a new user, OnceHub creates a Booking page for them. In the lefthand icon menu, you can click on the Booking pages icon to configure this further.

Editing other user profiles

Each user has a user profile that contains their details and the personal settings for their account. Only OnceHub administrators can edit all other user profiles, and team managers can edit aspects of only the users who are part of their team. Learn more about the differences among administrators, team managers, and member users.

1. Sign in to your OnceHub account.
2. In the top navigation menu, click the gear icon → **Users**. The users lobby will open.
3. Click on the user whose profile you would like to access.
   - To find a specific user, type their name into the **Filter by user name** box.
   - You can also sort users by name, role or assigned seats by clicking the arrow next to any of the fields.

4. The user's profile will open (Figure 2). As an administrator, you can:

- You can edit the personal details of other users. (Note that team managers can edit parts of their team members' profiles.)

- You can assign or unassign seats from their profile.

- You can edit email notification settings, date and time settings, and product-specific settings for all users in the OnceHub Account.

- You can change their role to administrator, team manager, or member user. (When you make someone a team manager, you will be prompted to select the team/s they will be the manager of)
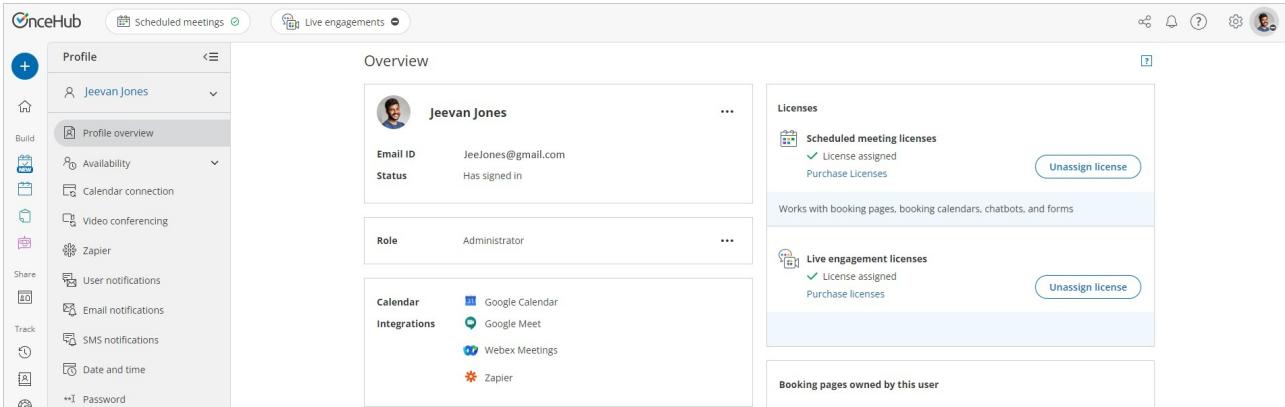

Figure 2: User Overview page

Deleting users

This section explains how to delete users from your account. Only OnceHub administrators can delete users.

Before you delete, you should consider keeping that user in your account and just unassign their seat. So long as you retain a paid subscription, your organization can have unlimited users without a seat assigned, at no additional cost.

You also won't need to delete their booking pages. When you unassign a scheduled meetings seat, any owned pages will be disabled automatically. You can keep an unlimited number of disabled booking pages for later use, without needing to recreate and reconfigure them once you're ready to enable them again.

1. In the top navigation menu, click on the gear icon → **Users**.

2. Click the action menu (three dots) next to the relevant user record and select **Delete User profile** (Figure 1) from the drop-down.

- To find a specific user, type their name into the **Filter by User name** box. This is useful if you have a large number of users in your account.

- You can also sort users by name, role or assigned seats by clicking the arrow next to any of the fields.
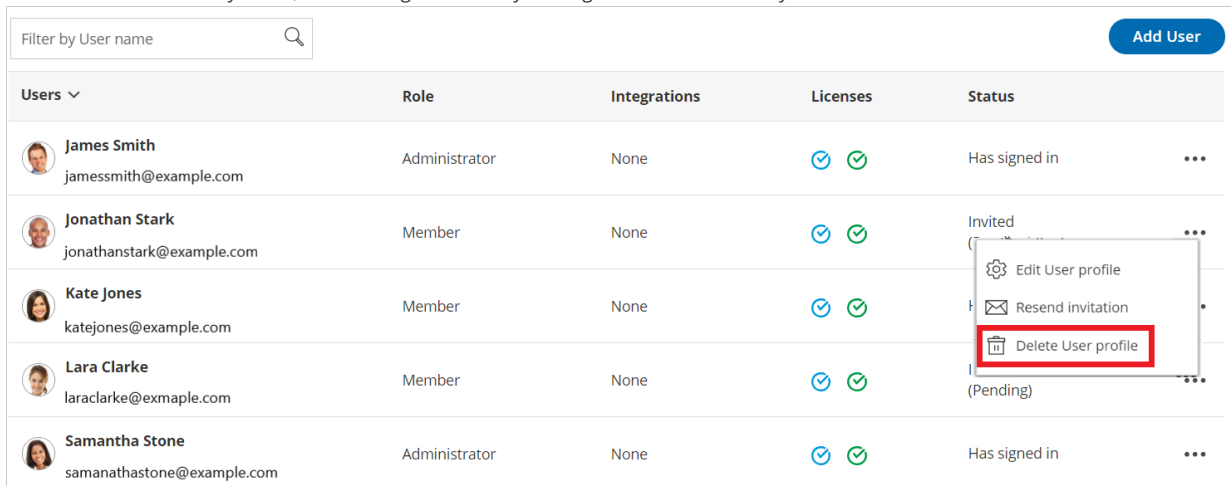

Figure 1: Users lobby

3. The User will be deleted.

   - When you have an paid subscription, at least one seat must be assigned to a OnceHub administrator. You cannot delete a user if they are the only administrator with a seat.

4. Upon deletion, an email notification will be sent to the deleted user and all OnceHub administrators. The user seat of the deleted user is now unassigned, and available to be assigned to another user.

> **(i) Note:**
>
> When the deleted user is the Owner of at least one Booking page, all Booking pages will be automatically transferred to a remaining administrator with a scheduled meetings seat upon deletion.

Seat management

Assigning seats to users

In order for a user to enjoy full functionality of a OnceHub feature, they must be assigned a seat. For instance, a licensed scheduled meeting user can be defined as Owner of an enabled Booking page and receive bookings.

Please note they can still use all other functionality in OnceHub and within all products without a seat.

You're able to assign a seat when you first add a user to your account.

If you already added them as a user, you can assign a seat to them in the **Overview** section of their profile.

To assign a seat, you must be a OnceHub administrator.

Assign a seat to one user

1. In the top navigation menu, click on the gear icon → **Users**.
2. Add a new user or select the specific user that you would like to assign a seat to.
3. In the **Profile overview** section of the selected user's profile, you can see the following information:

   - If the user has been assigned a seat or not.
   - How many seats you have in your account.
   - How many seats from the pool have been assigned.
   - How many seats are still available to be assigned.

4. Click the **Assign seats** button beneath the relevant product. If a seat is available, it will be automatically assigned to the user.
5. Once a user has been assigned a seat, they will be able to enjoy full functionality for the assigned product.

Assign seat to multiple users at once

1. In the top navigation menu, click on the gear icon → **Billing → Seats**.
2. Next to the relevant seat, click the three-dot menu and select **Assign seats**.
3. Select the specific users that you would like to assign a seat to.
4. Click the **Assign seat** button.
5. Once a user has been assigned a seat, they will be able to enjoy full functionality for the assigned product.

> **(i) Note:**
>
> If you have a monthly subscription and you've already assigned all seats to other users, you can purchase a single seat as part of the seat assignment process.
>
> When you click the **Assign seats** button, a pop-up will appear asking if you would like to purchase and assign a new seat. When you click the **Purchase and assign seats** button, the seat is immediately assigned to the user and automatically added to your OnceHub subscription.
>
> - You won't pay for this seat immediately. On your next billing date, you will pay a prorated amount for the seat you've just added. The

prorated amount will be added to your next recurring invoice.

- Once a user has been assigned a seat, they will be able to begin scheduling.

Unassigning user seats

You can unassign a seat from a user at any time. Seats can be unassigned in the **Overview** section of each user's profile.

When you unassign a user seats from a user, they will lose some functionality. However, they will retain access and a significant amount of functionality. For instance, any user who has not been assigned a scheduled meetings seat can do everything their role (member or administrator) allows them to do, except book appointments through an enabled Booking page.

Your organization can have unlimited users without a product seat assigned. This allows for a streamlined, cohesive process across your team. Everyone can access OnceHub to fulfill their role without extra cost, whether as a tech admin, virtual assistant, security admin, or more.

Effects of unassigning a seat

To unassign seats, you must be a OnceHub administrator.

- When you have an active subscription, at least one user seat must be assigned to a OnceHub administrator in order to keep the subscription active. If there is only one OnceHub administrator with an assigned user seat, their seat cannot be unassigned.

- If you unassign a scheduled meeting seat from a user who is the owner of at least one booking page, all of their booking pages will be disabled. If you'd like to keep the booking page(s) enabled for another user, we recommend changing the ownership of associated Booking page(s) before unassigning a seat.

Unassign seat for one user

1. In the top navigation menu, click on the gear icon → **Users**.
2. Select the specific user that you would like to unassign a seat from.
3. In the **Overview** section of the user's profile, click the **Unassign seat** button underneath the relevant product.
4. The seat will be unassigned and the user will no longer have full features provided by that seat. The seat is added back to the pool and is available to be assigned to another user.

Unassign seats for multiple users at once

1. In the top navigation menu, click on the gear icon → **Billing** → **Seats**.
2. Next to the relevant seat, click the three-dot menu and select **Remove seat**.
3. Select the relevant users and confirm by selecting the **Remove seats** button.
4. The seat will be unassigned and the user will no longer have full features provided by that seat. The seat is added back to the pool and is available to be assigned to another user.

Common use cases for users without a seat

Any user who has not been assigned a seat can still enjoy broad functionality of that product. Your organization can have as many users without seats assigned as you need, at no additional cost.

There are many advantages to retaining multiple users without assigned seats in your OnceHub account. This article reviews the primary use cases.

Settings access

Configuring your account

You can designate one or more team members to act as technical admins by creating an administrator user for them. They can access OnceHub and configure settings, preparing them for users who will later be assigned a seat and take bookings or live chat conversations.

Updating settings

The same technical admins can stay in the account to update settings later and/or add more users when necessary. This type of user is usually an administrator user.

You can also provide a user profile to assistants, who will be able to update your date-specific availability, contact info, social media links, and

other public-facing content. This type of user is usually a member user, without access to billing or advanced organizational settings.

Maintaining CRM connection

An administrator must stay connected to Salesforce or Infusionsoft to maintain the account's connection with the CRM. However, this administrator does not need an assigned seat.

Subscribing to notifications

You may have team members who don't take bookings or live chat conversations but want to stay up-to-date on activity relevant to their team. This could be a manager, assistant, or collaborator.

You can assign them as an Editor of a specific Booking page. This access allows them to subscribe to email and SMS notifications for all bookings scheduled through that Booking page.

Seasonal bookings or live chat conversations

If a team member only takes bookings or live chat conversations seasonally and you wish to recycle their seat, reassigning it to someone else, you can do so without deleting their Booking page or user profile.

Once you unassign their seat, you can assign that seat to someone else. For bookings, you can reassign that Booking page's ownership to another user (by default, OnceHub automatically disables any Booking pages they own when you unassign their seat).

For seasonal scheduled meetings users, the original user's Booking page(s) and user profile will stay in your account, ready for when you need to enable them again. If the user is reassigned a seat, and they've stayed the owner of their Booking page(s), there's no need for the administrator to update the Booking page ownership again. The page will simply be ready for them to enable and start receiving bookings again.

Example of seasonal bookings

A recruiter needs to arrange for hiring interviews between candidates and hiring managers. A specific hiring manager may receive bookings temporarily, while she is hiring a specific position. Once she fills that position, a OnceHub admin can unassign her scheduled meetings seat. She won't be able to receive bookings for interviews any longer.

However, her Booking page and user profile will stay, keeping all her configured settings and connected integrations (such as a calendar). When she has a new position open for candidates, the OnceHub admin can reassign her a scheduled meetings seat and re-enable her page, so she can take interview bookings again. They won't have to reconfigure her Booking page or user profile and she won't have to reconnect any integrations.

Activity stream and reporting access

If you have a manager, assistant, or collaborator who needs to manage activity and/or access reports, you can create an administrator user profile for them.

When they log in, they will see the Activity stream. The Activity stream is the central hub where you can manage all of your booking, conversation, and payment activities. The Activity stream provides advanced filtering options to give you quick access to the information you require.

As an administrator, they will have access to OnceHub reports. They can view, customize, and export reports to analyze booking trends.

Billing access

Provide an administrator user profile for your finance team member to manage the account billing. They can log in, pay for the account, keep track of invoicing, add seats, receive billing notifications, and update payment details.

Security and privacy compliance

If you have security and privacy managers, you can create an administrator user profile for them.

Security managers can define relevant security settings, such as password policies, session policies, account lockout policies, and more.

Privacy managers will have access to delete activities in the Activity stream, keeping you in compliance with data privacy law.

If relevant to your organization, privacy managers can act as your Data Protection Officer and/or EU Representative according to GDPR standards, ensuring compliance in your OnceHub account.

Branding your look and feel

If you want a designer on your team to help define and/or configure the custom branding for your Booking pages' custom themes and notification templates, you can create an Administrator user profile for them. They can upgrade the look and feel on your pages and notifications to match your organization, keeping your customer experience consistent and professional.

Someone with coding knowledge for emails can update your custom templates using HTML.

Adding seats

To add seats, select the gear icon in the top navigation menu → **Billing** → **Seats** → **Add seats**.

When you add seats:

- They are immediately available for you to assign to users in your account.
- You will only pay for them on your next billing date.

On your next billing date, you'll pay:

- A prorated adjustment for the seats added during the current billing cycle.
- The full amount for the total number of seats in your account.

Adding seats to a monthly subscription

You can add seats to your monthly subscription at any time.

In order for a user to enjoy full functionality of a OnceHub product, they must be assigned a seat. For instance, a user with a scheduled meetings seat can be defined as owner of an enabled Booking page in OnceHub and receive bookings.

Please note they can still use all other functionality in OnceHub and within all products without a seats.

As your team grows, you can add as many seats as you need. Seats can be added at any time.

When you add seats to a monthly subscription:

- They are immediately available for you to assign to users in your account.
- You will only pay for them on your next billing date.

On your next billing date, you'll pay:

- A prorated adjustment for the seats added during the current billing cycle.
- The full amount for the total number of seats in your account for the upcoming month.

You can also add seats while assigning a seats to a User in their profile.

How the prorated adjustment works

You pay a prorated adjustment for any seats that you add during a billing cycle. This amount is only due on your **next** billing date. This means that you can add seats during your billing cycle without making multiple payments and receiving additional invoices.

For example, let's say you already have 20 seats in your account and your billing cycle starts on the 20th of every month. If you add 10 seats to your account during current your billing cycle, they will immediately be available for you to use, but you won't pay for them immediately (Figure 1).

On your next billing date, you will pay a prorated amount for the 10 seats you added during the billing cycle, plus the full amount for the 30 seats in your account for the upcoming month. On the following billing date, if you don't add any more seats, you will only pay the full amount for the 30 seats in your account for the upcoming month.
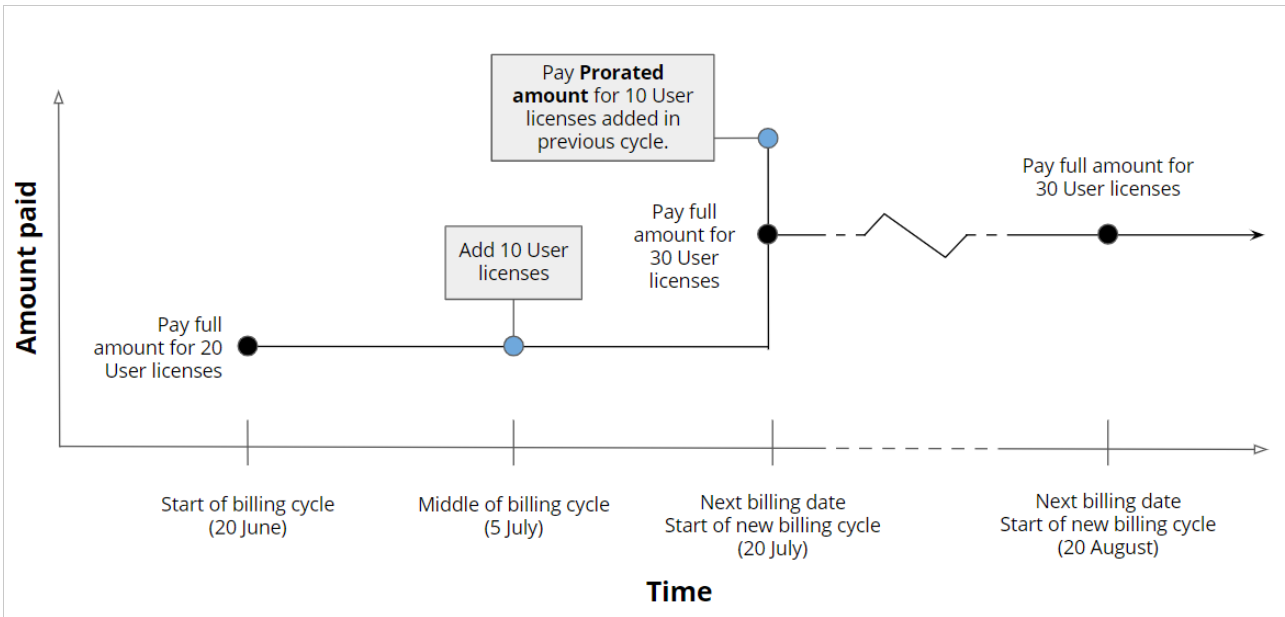
Figure 1: Prorated adjustment

> **ⓘ Note:**
>
> The billing date and time for your recurring payment cycle will be the exact date and time when you purchased your first seat. All billing dates and times are based on UTC (Coordinated Universal Time).

Your recurring billing date does not change when you add additional product seats.

For complete transparency, advanced billing notifications are sent seven days prior to payment. You can cancel any time you wish. For more information, select **Billing → Billing Notifications**

Adding seats to an annual subscription

In order for a user to enjoy full functionality of OnceHub, they must be assigned a seats for the feature they want to use. For instance, a licensed user of scheduled meetings can be defined as owner of an enabled booking page in OnceHub and receive bookings.

Please note they can still use all other functionality in OnceHub and within all products without a seat.

As your team grows, you can add as many seats as you need. Seats can be added at any time.

Adding product seats

When you add seats:

- They are immediately available for you to assign to users in your account.
- You are immediately charged a prorated adjustment for the seats you've just added.

On your next billing date, you'll pay:

- The full amount for the total number of seats in your account.

How the prorated adjustment works

You pay a prorated adjustment for any seats that you add during the billing cycle. This amount is due at the time of purchase and is based on the number of days until your next billing date. On your next billing date, you'll pay the full amount for all seats in your account.

For example, let's say you already have 20 seats in your account and your billing cycle starts on the 1st of January every year. If you add 10 seats to your account at any time during your billing cycle, they will instantly be available for you to use, and you will pay a prorated amount for them immediately (Figure 1).

On your next billing date, you'll pay the full amount for the 30 seats in your account for the upcoming year. On the following billing date, if you

don't add any more seats, you will only pay the full amount for the 30 seats in your account for the upcoming year.
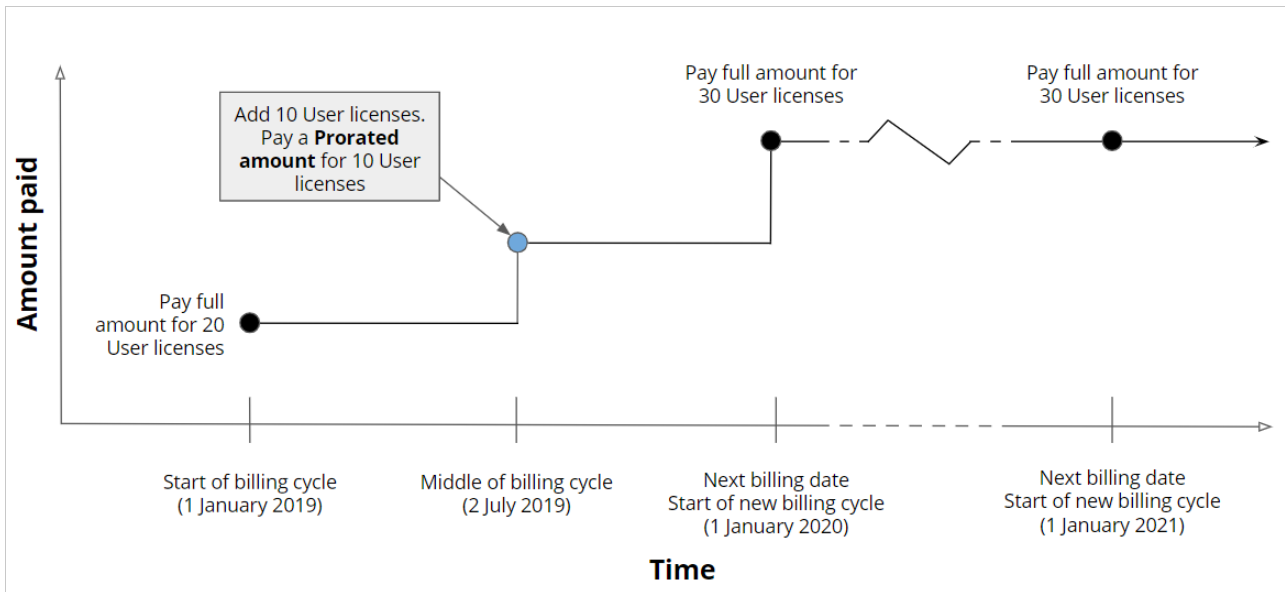

Figure 1: Prorated adjustment

> **Note:**
>
> The billing date and time for your recurring payment cycle will be the exact date and time when you purchased your first seats. All billing dates and times are based on UTC (Coordinated Universal Time).
>
> Your recurring billing date does not change when you add additional seats.
>
> For complete transparency, advanced billing notifications are sent seven days prior to payment. You can cancel any time you wish. For more information, select **Billing → Billing Notifications**

How to purchase and add product seats

To purchase product seats, you must be a OnceHub administrator.

1. Click the **Add seats** button next to the feature you would like to purchase seats for.
2. In the **Add seats** page, select the number of additional seats you'd like to purchase.
3. The **Next payment** box is updated based on the number of seats you add. Your next payment includes:

   - **Prorated adjustment:** Payment for seats added during the current billing cycle. To see more information about the prorated adjustment, click **View details**.
   - **Seats:** Payment for seats to be used in the upcoming billing cycle.

4. Once you've added all the seats you need, click **Update subscription.**

   - The seats you've just purchased are automatically added to your existing subscription and are immediately available for you to assign to users.
   - The prorated adjustment and additional seats will be added to your next invoice.

> **Note:**
>
> You can also purchase single seats directly from a user's profile as you need them.

How to add product seats

1. Click the **Add seats** button next to the product you would like to purchase seats for.
2. In the **Add seats** page, select the number of additional seats you'd like to purchase.

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3. The **Order summary** box is updated based on the number of product seats you add.

   - **Prorated adjustment:** Payment for seats added during the current billing cycle. To see more information about the Prorated adjustment, click **View details**.
     The prorated adjustment is charged to your primary payment method immediately at the time of purchase.
   - **Future recurring payments:** Payment due on your next billing date and future billing dates.

4. Once you've added all the seats you need, click **Proceed to payment.**

5. On the **Secure payment** screen, select the Payment method you want to use. You can either pay with an existing payment method, or click **use a new payment method** to pay with a different payment method.
   By default, your primary payment method is selected.

6. Click **Submit payment.**

   - The product seats you've just purchased are automatically added to your existing subscription and are immediately available for you to assign to users.
   - You are immediately charged for the additional seats.
   - You'll receive an invoice for the seats you've just added.
   - The transaction is recorded in the **Billing → Transactions** tab.

Another method to add seats is to select the gear icon in the top navigation menu → **Billing → Seats**.

Removing seats

When you remove seats from your subscription, they are still available for use until the end of your current billing cycle. This is because you've already paid for all your seats in advance, at the beginning of the current billing cycle.

For example, let's say your billing cycle starts on the 20th of every month and you already have 15 seats in your account. You remove 5 seats from your account during your billing cycle. You will still have access to these seats until the next billing date. On this date, the seats will be removed from your account and you will only pay for 10 seats for the upcoming month.
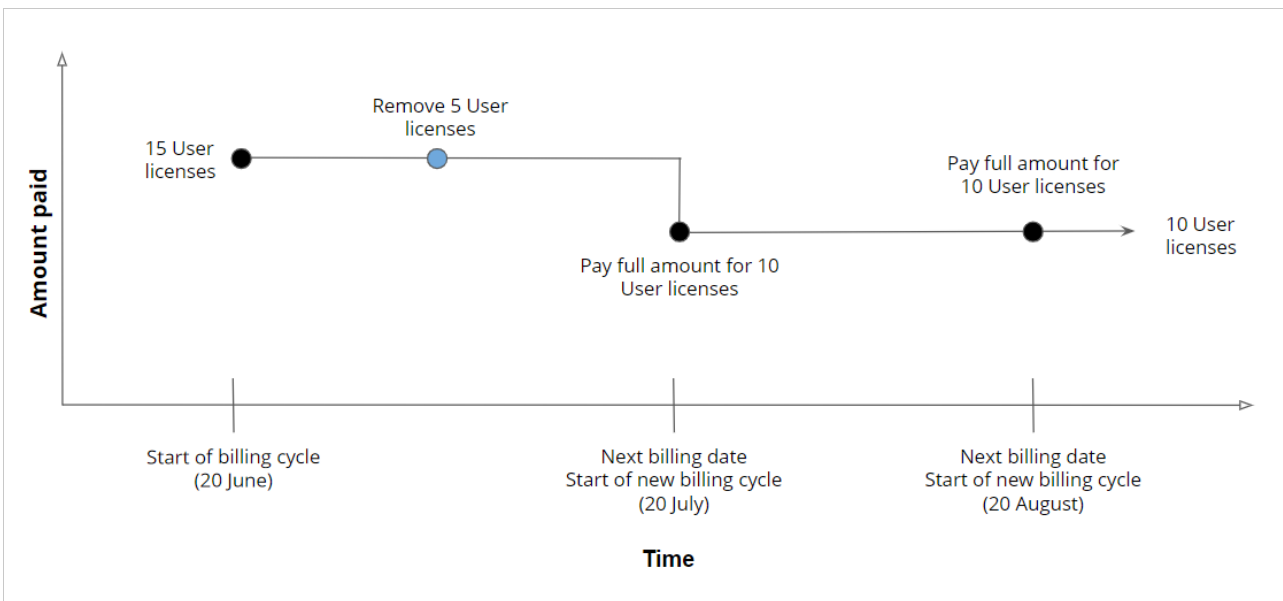

Figure 1: Removing seats

We recommend unassigning seats before removing them. Otherwise, OnceHub will randomly remove seats on the next recurring billing date.

> (i) **Note:**
>
> You cannot purchase additional seats while a seats removal is pending. If you change your mind about removing product seats, you can cancel a pending removal at any time before the next billing date.

You can remove product seats by selecting the gear icon in the top navigation menu → **Billing→ Seats**.

You must be a OnceHub administrator to remove product seats.

1. In the **Seats** page, click **Remove seats**.

2. In the **Remove seats** page, select the number of product seats you want to remove. The **Next payment** box is updated with the amount due on the next billing date, based on the number of seats you remove. Your next payment includes only the payment for seats to be used in the upcoming billing cycle.

3. Click **Update subscription** to save your changes.

The seats will be removed from your account at the end of your current billing cycle and can still be used in the application until then.

> ⓘ **Note:**
>
> If you want to cancel your subscription and remove all seats from your OnceHub account, you'll need to delete your account. Learn more about deleting your OnceHub Account

Does my user need an assigned seat?

When you create a new user, you assign that user an account role: member or administrator. This determines their access levels, including for billing, advanced configuration, and reporting.

Next, you can determine whether you should assign them a seat.

The only difference between users with and without a **scheduled meeting** seat is that those with a seat can accept appointments through an enabled Booking page. Similarly, users with a **live engagement** seat can participate in live chat conversations and instant calls.

Users without a seat can do everything else in the account those with a seat can do, according to their account role (member or administrator).

With a paid subscription, you can create as many users as your organization needs at no additional cost. However, you have a finite amount of seats to assign them, according to your subscription. This allows you to create unlimited users for your organization at no additional cost who can support your account through various roles.

Users with a seat

Any users can receive bookings after you assign them a scheduled meeting seat.

Once you've assigned them a scheduled meeting seat, you can make them an owner of an enabled booking page and they can receive bookings through it.

Similarly, any users can participate in live chat conversations after you assign them a live chat seat.

Users without a seat

Any user who has not been assigned a scheduled meeting seat can do everything their role (member or administrator) allows them to do, except book appointments through an enabled Booking page or participate in live chat conversations.

Your organization can have unlimited users without a seat assigned.

This allows for a streamlined, cohesive process across your team. Everyone can access OnceHub to fulfill their role without extra cost, whether as a tech admin, virtual assistant, security admin, or more.

Seasonal users

Seasonal users are sometimes assigned a seat and sometimes not, according to their organization's needs.

If a team member only takes bookings or participates in live engagements seasonally and you wish to recycle their seat, reassigning it to someone else, you can do so without deleting their Booking page or user profile.

Once you unassign their scheduled meeting seat, their Booking pages will be disabled automatically. You can then assign ownership of those Booking pages to someone else and re-enable the page. Alternatively, you can keep the page disabled, to be used in future, when it becomes relevant again.

The original user's Booking page and user profile will stay in your account, ready for when you need to enable them again.