Adding Users

OnceHub is a true 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.

In this article, you'll learn how to add Users to your account.

Requirements

You must be a OnceHub Administrator to add new Users.

Adding Users

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

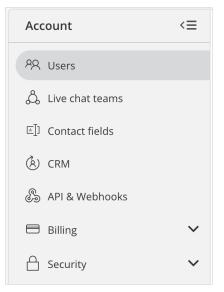


Figure 1: Users page

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

lsers					[
Filter by User name or email Q		4 out of 10 Schee	f 10 ScheduleOnce User licenses in use (Add licenses)		
Users 🗸	Role	Integrations	Licenses	Status	
John Smith john@example.com	Member	None	${}^{\odot}$	Invited (Pending)	•••
LC Lauren Carr lauren@example.com	Member	None	\odot	Invited (Pending)	•••
MR Michelle Reece michelle@example.com	Member	None	<u>ତ</u> ତ	Invited (Pending)	•••
SL Shonda Lee shonda@example.com	Administrator	None	<u>ତ</u> ତ	Invited (Pending)	•••

Figure 2: Users lobby

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

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Add Users			?)
Users	Assign licenses Co	——O onfirmation		
Provide emails, names, and roles of the mail address (5)	people you want to add. Name	Role		
john@example.com	John Smith	Member	~	
michelle@example.com	Michelle Reece	Member	~	
lauren@example.com	Lauren Carr	Member	~	
victor@example.com	Victor Bonne	Administrator	~	
shonda@example.com	Shonda Lee	Administrator	~	
+ Add User				
Iancel			Next	

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**: Member or Administrator. Note that the User's role can always be updated by clicking on the User's profile in the User 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 license. Once you're satisfied with the assignment, click Next.
 Does my User need an assigned license?
 How to assign or unassign licenses to Users
- 10. Review the Confirmation page (Figure 4), which specifies how many Users you'll be adding and how many licenses you'll be assigning..

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Add Users				? ×
	Users	Assign licenses	Confirmation	
You are about to:				
Add 5 Users (2 A	dministrators 3 Me	mbers)		
Assign 3 Schedu	leOnce User licenses			
Email invitation				
Default		\sim		

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.

- 11. To adjust your Users or their license assignment, click **Back**. If you'd like to proceed with adding the User(s), click **Add Users**.
- 12. 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.

Learn more about joining the OnceHub organization as a new User

i 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.

Learn more about getting started with Booking pages