Assign a Role to a User

1. To assign a role to a user, click the Contact icon, then click the pencil icon beside the record to edit it.

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| Corporate | | | | | | | | |
| Q = | Contacts | | | Filter | Add Share S | | | |
| * | First Name | Last Name ↑ | | Title | Actions | | | |
| | John | Doe | | | M 🖉 | | | |
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- 2. Click the Account tab.
- 3. Locate the Role Membership section, then click Add.

| Role Membership | | | | | |
|-----------------------|-----------------------------------|--|--|--|--|
| User's Current Roles: | User does not belong to any roles | | | | |
| | - Add - | | | | |

4. Select the role you wish to attach to the contact from the Select Roles window, then click Add & Edit or Add & Continue to save your changes.

| Select Roles | × |
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