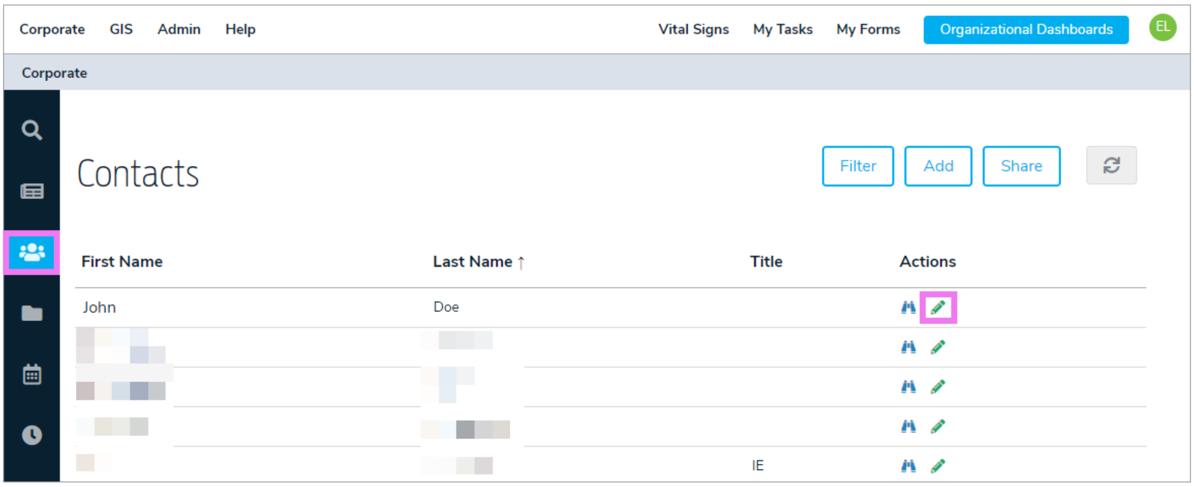
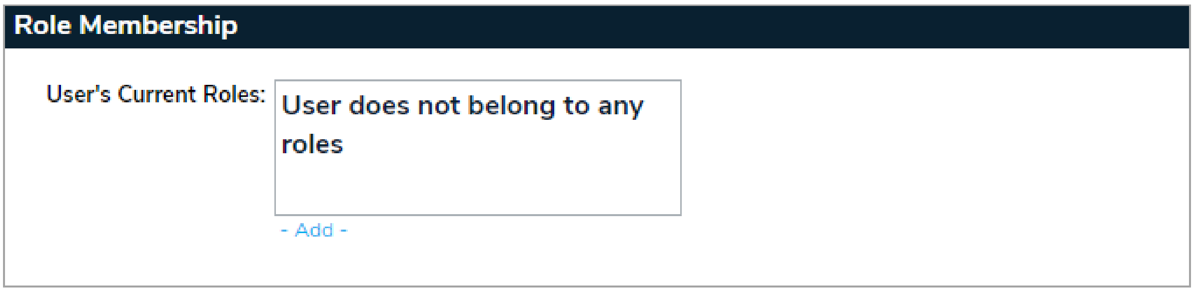
Assign a Role to a User

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

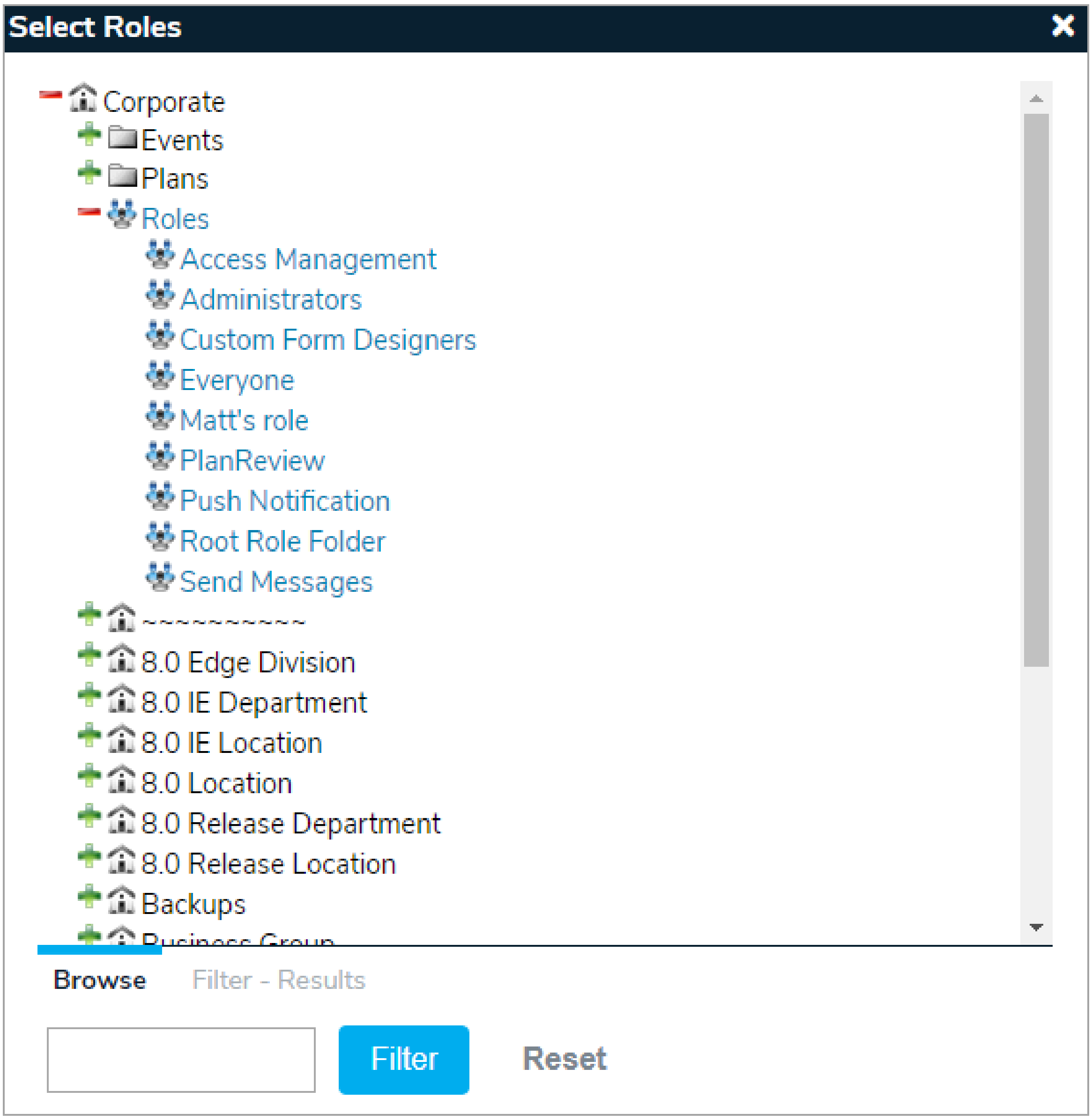


2. Click the Account tab.

3. Locate the Role Membership section, then click 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
Corporate
Events
Plans
Roles
Access Management
Administrators
Custom Form Designers
Everyone
Matt's role
PlanReview
Push Notification
Root Role Folder
Send Messages
~~~~~~~~~~~
8.0 Edge Division
8.0 IE Department
8.0 IE Location
8.0 Location
8.0 Release Department
8.0 Release Location
Backups
Browse
Filter - Results
Filter
Reset
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