

Managing Group Access

The Group Administrator(s) can invite users to the group. There is no limit on the number of users that can be given access to a group. There are 4 permissions:

Read Only: Can view codes, prefixes and related data, search for codes and export, email or print codes.

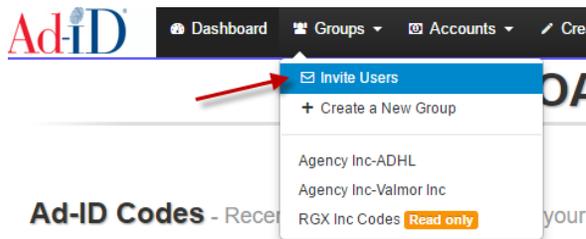
Edit Only: In addition to read only permissions, an Edit Only user can edit code information.

User: In addition to all actions permitted to Edit Only and Read Only users, a User can create Ad-ID codes, manage the group address book and associate or disassociate accounts and prefixes to the group. This is subject to their permission to the account or prefix.

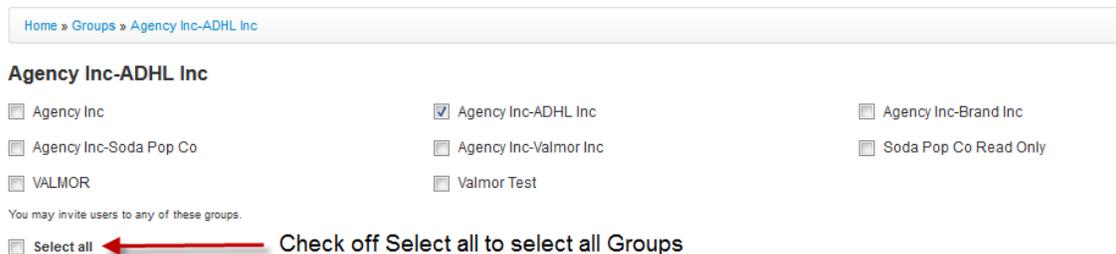
Administrator: Can add, edit and remove users, edit the group name, hide the group and associate Ad-ID codes with another group. The creator of the group is automatically an Administrator of the group.

Inviting Users to Group(s)

1. The Invite Users feature is accessible from the Dashboard and groups menu. Administrators can also view this feature on each groups home page. To access, go to Groups drop down menu and click on Invite Users



2. Check off the group(s) you want to add the users to. You can choose one group, multiple groups or check the select all box. If you do not see a particular group listed, you may not be the Administrator. Contact cs@ad-id.org for next steps.



1. Select the email addresses of those you want to add. When sending an email through the Ad-ID system, the system will save an email address after the email is sent and you can select from the saved addresses list. You may also enter other emails into the “emails” field. When entering multiple emails in this field, separate them with a comma. Then choose the Permission and click on Invite Users.
 - a. If the user already has an Ad-ID log in, they will automatically be added to the group(s).
 - b. If the user does not have a log in, they will receive an email and will need to complete the registration process.

Permission *

Choose Role

Saved addresses

cs@ad-id.org

info@ad-id.org

Your list of previously saved addresses. Visit your [profile](#) to add or edit email addresses. Use ctrl-click (option-click) to select multiple addresses.

Emails

addie@ad-id.org,codes@ad-id.org

Enter emails to add, each separated by a comma.

Click on one email or use Ctrl-Click (option click) to select multiple.

Manually type in additional emails here. Separate each one with a comma.

Editing a User’s Role for One Group

1. Access the group for which you need to edit users. On the right side, click on Manage Group Users.

Agency Inc-ADHL

GROUP ACTIONS

2. Click on the icon in the Actions column.

Actions: Selected 10 records per page Filter Users:

Actions	Email	First Name	Last Name	Role	Actions
<input type="checkbox"/>	demo@ad-id.org	Customer	Service	Administrator	Edit <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	demo@adidagency.com	Customer	Service	Administrator	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	cs@ad-id.org	Admin	Admin	User	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	lsmith@ad-id.org	Lindsay	Smith	User	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	info@ad-id.org	Customer	Service	Edit Only	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Showing 1 to 5 of 5 entries

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3. Select the role and click Update.

Edit User Role

cs@ad-id.org

Select a role

Click to update

Select role

User

Administrator

User

Edit Only

Read Only

Edit a User's Role for Multiple Groups or Remove from Multiple Groups

1. Access one of the groups for which you need to edit user(s). On the right side, click on Manage Group Users.

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GROUP ACTIONS

- [Invite Users](#)
- [Manage Group Users](#)

2. Click on person's email address.

Actions:	Selected	10 records per page	Click on email address		
<input type="checkbox"/>	Email	First Name	Last Name	Role	
<input type="checkbox"/>	demo@ad-id.org	Customer	Service	Administrator	
<input type="checkbox"/>	demo@adidagency.com	Customer	Service	Administrator	
<input type="checkbox"/>	cs@ad-id.org	Admin	Admin	User	
<input type="checkbox"/>	lsmith@ad-id.org	Lindsay	Smith	User	

3. Check off Group(s) you want to remove or edit their permission for.

Actions:	Selected	10 records per page	Filter:
<input type="checkbox"/>	Group	Role	Actions
<input type="checkbox"/>	Agency Inc-ADHL	User	✉ ⋮ 🗑️
<input type="checkbox"/>	Agency Inc-Soda Pop Co	User	✉ ⋮ 🗑️

4. Click on Selected arrow at the top of the table and choose the action for the selected Group(s).

Actions:	Selected	Filter:	
<input type="checkbox"/>	Group	Role	Actions
<input type="checkbox"/>	Agency Inc-ADHL	User	✉ ⋮ 🗑️
<input type="checkbox"/>	Agency Inc-Soda Pop Co	User	✉ ⋮ 🗑️
<input type="checkbox"/>	Agency Inc-Valmor Inc	User	✉ ⋮ 🗑️

Action for selected groups:

- Remove User From Groups
- Change Role to Administrator
- Change Role to User
- Change Role to Edit Only
- Change Role to Read Only

Please visit www.ad-id.org to access additional help instructions or contact Ad-ID customer relations at 704-501-4410 or cs@ad-id.org.