

# Users

The User page in Settings allows you to create user accounts. iPost uses the user's email address as the username for the user account. The email address must be unique across all account. iPost does accept alias addresses as usernames.

To create a user, please follow the steps below.

1. On the User page, click the *Add User* button.
2. Enter the user information for the user account you are creating. The required fields are First Name, Last Name, Email Address, and Password.
3. Click *Save*.

For Agencies or client accounts that have multiple subclient accounts, user accounts that are created in the main (or parent) account will have access to all subclient accounts. If a user needs access only to a specific subclient, the user account should be created in that subclient.

Once user accounts are created, they will be displayed in the User Manager. The User Manager consists of the following fields.

Column	Description
Email Address	The user's email address.
Name	The user's name.
Account Status	The status of the user account which will be either Enabled or Disabled.
Actions	A drop down of actions that can be performed on user accounts.

## Actions

Once a user account has been created, you will then be able to maintain and change the account as needed. The options available for the maintenance of the account are found in the Actions dropdown.

## Edit User

Edit User allows you to edit the user information. All user fields are able to be edited with the exception of the email address, as this is also the username for the user account. To edit a user, please follow the steps below.

1. Select *Edit User* from the Actions dropdown.
2. Edit the user information that needs to be changed.
3. Click *Save Changes*.

## View History

View History provides a view of all actions the user has taken in the account. When on the View History page, you have access to the following information:

- Time provides the date and time of the action.
- Account is the name of the user account.
- Description provides the details of the action taken by the use.

## Manage Permissions

User Permissions grant users access to various functionality within the platform. When permissions are enabled, the functionality will be available within the navigation menu. When they are disabled, the functionality will no longer appear in the navigation menu. By default, all permissions are enabled for new users.

Category	Permission	Permission Enabled	Permission is Disabled	Other Restrictions
Agency Group	View Subclients	Users have access to all subclient accounts.	Users do not have access to any subclient accounts.	
	Maintain Subclients	Users can view the Subclient page in Settings and are able to create and manage existing subclient accounts.	Users do not have access to the subclient page in settings.	View Subclients permission must be enabled.
	View Subclient Users	Users can view User page for subclients but cannot edit any user accounts.	Users are unable to view any of the user accounts for subclients.	View Subclients permission must be enabled.
	Maintain Subclient Users	Users are able to view and edit user accounts for sub-clients.	Users are unable to edit any user subclient user accounts.	View Subclient Users permission must be enabled.
Assets	View Assets	Users are able to view, upload, and	The Asset Library will not be	

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		edit images in the Assets Library.	displayed in the platform.	
Automation	View Automations	Users are able to view, create, and edit Automations.	Automations will not be displayed in the platform. Users without this permission will not be able to schedule email sends.	
Data Tables	View Data Tables	Users have access to Data Tables. Users are able to create and edit Custom and Dynamic Data Tables. Users can view all data maintained in data tables.	Data Tables will not be displayed in the platform. Users will still be able to select data tables for sending if Email permissions are enabled.	
	View SQL Queries	Users will be able to view, create and edit SQL Queries.	SQL Queries will not be displayed in the platform.	View Data Tables must be enabled.
Contacts	View Topics	Users are able to view, create, and edit Topics.	Topics will not be displayed in the platform.	
	View Lists	Users are able to view, create, and edit Lists. Users can view all contact data related to lists.	Lists will not be displayed in the platform. Users are still able to select lists for sending if Email permissions are enabled.	
	View All Contacts	Users are able to view All Contacts. Users are able to import and	All Contacts will not be displayed in the platform.	


Category	Permission	Permission Enabled	Permission is Disabled	Other Restrictions
		export contact information from All Contacts. Users are able to add and edit contacts in All Contacts.		
	View Saved Filters	Users are able to view, create, and edit Saved Filters.	Saved Filters will not be displayed in the platform.	
	View Categories	Users are able to view, create, and edit Categories.	Categories will not be displayed in the platform.	
Emails	View Emails	Users are able to view, create, and edit Email. Users are also able to schedule emails sends.		
	View Templates	Users are able to view, create, and edit Templates.	Templates will not be displayed in the platform. Users will be able to select templates when creating a Templated Email.	
	View Headers & Footers	Users are able to view, create, and edit Headers & Footers.	Headers & Footers will not be displayed in the platform. Users will be able to select Headers & Footers in the property section of an email.	
	View Dynamic Content	Users are able to view, create, and edit Dynamic Content.	Dynamic Content will not be displayed in the platform. Users	

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			will still be able to select and insert Dynamic Content from within an email.	
	View Snippets	Users are able to view, create, and edit Snippets.	Snippets will not be displayed in the platform. Users will still be able to select Snippets from within an email.	
	View RSS	Users are able to view RSS Content but will not be able to create it.	RSS will be displayed in platform but users will be unable to create RSS. Users will still be able to select RSS content from within an email.	
Email - Drag & Drop Role	BasicUser	Users are only able to edit unlocked content areas and rows.		
	Designer	Users are able to edit all content areas and rows but cannot lock content areas and rows.		
	SrDesigner	Users are able to edit all content areas and rows. Users are also able to lock/unlock content areas and rows.		
	MainEditor	Users are able to edit and lock/		

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		unlock all content areas. User is not able to lock/unlock rows.		
	MainAdmin	User is able to edit all content areas and rows. User is able to lock/unlock all content areas and rows.		
Reports	View Reports	Users are able to access all iPost Reports and view the reporting statistics.	Reports will not be displayed in the platform.	
Settings	Maintain Client Settings	Users are able to view and edit information on the Clients page in Settings.	The Client Settings page will not be displayed in the platform.	
	Maintain Delivery Management Settings	Users are able to view and edit the Delivery Management page in Settings.	The Delivery Manage page will not be displayed in the platform.	
	Maintain Web Analytic Settings	Users are able to view and edit the Web Analytics page in Settings.	The Web Analytics page will not be displayed in the platform.	
	View Database Schema	Users are able to view the Database page in Settings but cannot make any edits.	The Database page will not be displayed in the platform. The Maintain Database Schema permission will also be disabled.	
	Maintain	Users are able to	Users are able to	View Database

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	Database Schema	view and edit the Database page in Settings.	view the Database page but are not able to edit any information.	Schema permission must be enabled.
	View Users	Users are able to access the User page in Settings. On the User page, users are able to view users and their profiles, along with the user History.	The User page will not be displayed in the platform. Maintain Users permission will also be disabled.	
	Maintain Users	Users are able to create and edit user accounts on the User page in settings.	Users are able to view Users but are not able to edit any information.	View Users permission must be enabled
	Maintain Confluxery	Users are able to enable and configure integrations available in the iPost Confluxery.	The iPost Confluxery page will not be displayed in platform.	
Engagement Score	Maintain Engagement Score	Users are able access Engagement Score in Settings in order to modify personas and rules used to generate audiences.	Users are not able view the Engagement Score Settings page but are still able to see the Engagement Score reports on the Dashboard and will still have access to the generated audiences.	
SMS	View SMS Snippets	Users are able to view, create, and edit SMS		

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		Snippets.		
	View SMS	Users are able to view, create, and edit Mobile content. Users are also able to schedule Mobile sends.	SMS Snippets will not be displayed in the platform. Users will still be able to select Snippets from within the Mobile Content	View SMS permission must be enabled.

 Both Engagement Score and SMS are paid features that need to be enabled in your account in order to access them. Please contact your Customer Success Manager if interested in either of these features.

## Editing User Permissions

User permissions can be managed on the User page in *Settings*. To update User Permissions, please follow the steps below.

1. On the User Page, click the Action drop down for the user in which you will be updating permissions.
2. Select *Manage Permissions* from the Action drop down.
3. On the Manage Permission page, expand the permission set to see the access settings.
4. Either uncheck the permission to disable it or check the permission to enable it.

Permission changes are saved automatically as soon as the permission is enabled or disabled.

## Change Password

Change Password allows you to change the password for a user. To change the password, follow the steps below.

1. Select *Change Password* from the Actions dropdown.
2. Enter the new password in the *New Password* and *Confirm Password* fields.
3. Click *Save Changes*.



## Disable Account

Disable Account allows to you make a user account inactive. Once an account is disabled, the user will no longer be able to login to the platform. To disable an account, select the option from the Actions dropdown. The status of the user account will then be updated.