

# Adding a User as a Contact

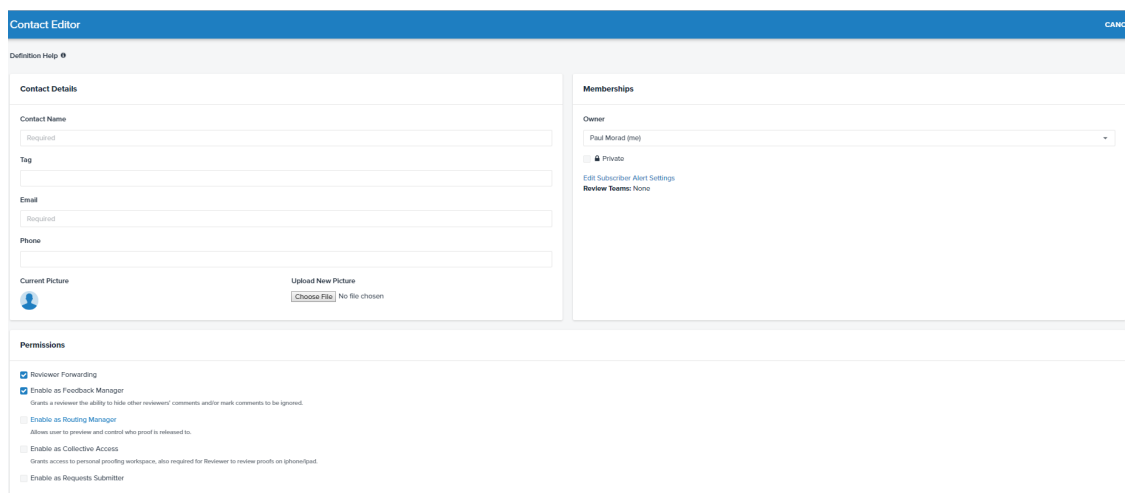
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In order for a User to participate in proof reviews, they also need to be added as a Contact in your account. To add an existing User as a Contact, navigate to the Contacts tab and click Add Contact in the top left.

Add the User's name and email address, and enable the Feedback Manager permission when applicable. Click Save to continue.



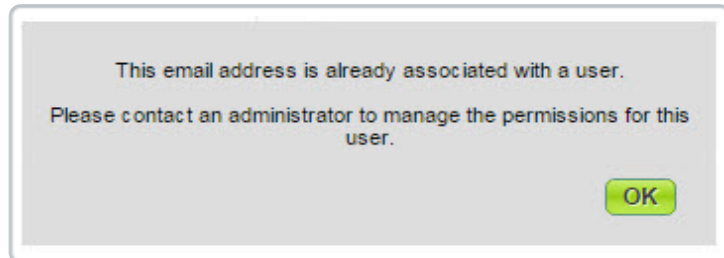
The email address must match the user email record in order for the user login to be associated with the applicable proof reviews, otherwise this will create confusion in the review process.



The screenshot shows the 'Contact Editor' interface. At the top, there's a blue header with 'Contact Editor' and a 'CANCEL' button. Below the header, there's a 'Definition Help' link. The main content area is divided into three sections: 'Contact Details', 'Memberships', and 'Permissions'. The 'Contact Details' section has fields for 'Contact Name' (required), 'Tag', 'Email' (required), 'Phone', and 'Current Picture' (with an 'Upload New Picture' button and a 'Choose File' button). The 'Memberships' section has an 'Owner' dropdown menu (currently showing 'Paul Morad (me)') and a 'Private' checkbox. The 'Permissions' section has several checkboxes: 'Reviewer Forwarding' (checked), 'Enable as Feedback Manager' (checked), 'Enable as Routing Manager' (unchecked), 'Enable as Collective Access' (unchecked), and 'Enable as Requests Submitter' (unchecked). Each checkbox has a small description of its function.



**Note:** Do not give an existing user any further permissions from the Add Contact page. Routing Manager, Collective Access, or Job Launch Submitter permissions require the creation of new login credentials in the Add Contact page. If you attempt to do this, you will get the error message below.



For users, Job Launch Submitter permissions are applied by an Admin in the User record by going to Account > Account Settings > Users/Groups. Routing Manager and Collective Access permissions do not apply to users because they inherently receive a login and the ability to enable Job Launch Manager permissions.



## My Account

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### Edit Existing User

[Resend Credentials](#)[Delete User](#)

Edit user information in the fields below then select save.

Name:   
Title:   
Email:   
User Name:

Additional Return Notification Recipients:

These emails will receive notifications when your Reviews are completed.  
Separate email addresses with a comma (email@home.com,email2@home2.com)

#### RESET PASSWORD

Password:   
( Password criteria: should be at least 5 characters )  
Re-type Password:

#### USER TYPE

☐ Admin

Full access to all features of the application including global administrator features.  
(Admin access should be limited to only key personnel)

☒ Staff

Provides access to upload, sort, search and edit proof details as well as manage contacts and view reports. (Most common User Type)

☐ CSR

Similar access as the Staff User Type but upload capabilities have been removed.  
(Recommended for sales and customer service users)

☐ Vendor

Provides streamline upload access. (inVite feature)

#### PERMISSIONS

##### ☒ Reviewer Permissions

Allow this user to access and review pending proofs they have been invited to participate on as a reviewer from their workspace.

##### ☐ Public Contact Access

Allow access to public contacts

If unchecked, this user will only be able to view contacts, review teams and workflow teams that they have created or have access through as a contact filter group (restriction does not apply to administrators).

##### ☐ Job Launch Manager

Allow this user to access, manage and review pending Job Launch.

Includes the ability to migrate Job Launch into Project.

☐ Allow this user to use an enhanced Job Launch workspace.

##### ☒ Job Launch Submitter

Allow this user to submit Job Launch.

Select accessible form(s) for this user:

☒ Best of Dynamic Demo ☒ Best of Email

#### CONTACT FILTER GROUPS ACCESS

Select: all / none

#### USER GROUPS

None

#### TAGS

There are not any [Tag Lists & Tags](#) to be displayed.

[Save](#)[Cancel](#)