

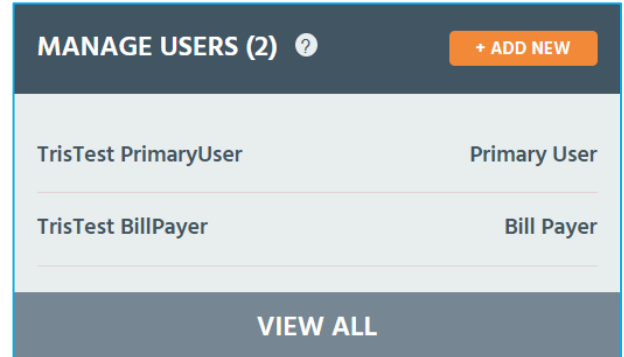
QRG4 – QUICK REFERENCE GUIDE

Adding & Managing Users



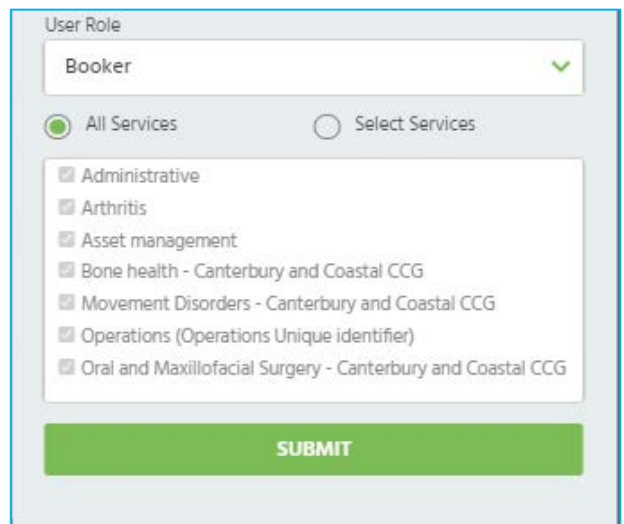
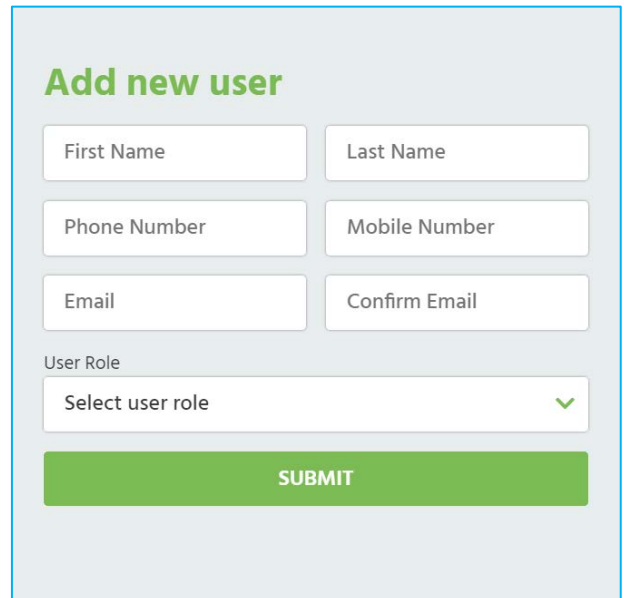
ADDING NEW USERS TO YOUR ORGANISATION

- Log into your *NHS Open Space* account and navigate to the 'Accounts' page.
- Select the **[+ ADD NEW]** button.



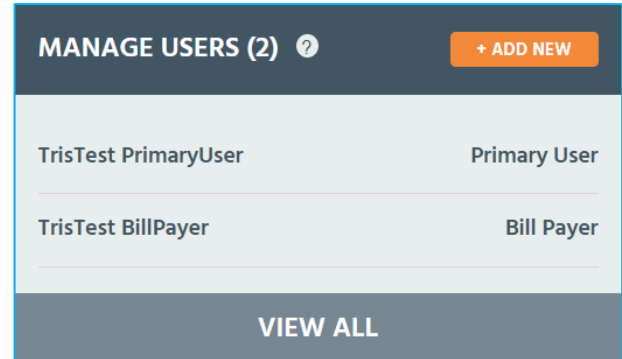
New User Creation

- Input the users first name, last name, email address, phone number and select their role (see user definitions below).
- *Note: The email address must exist to allow login details to be received.*
- Select the **[SUBMIT]** button to complete the process.
- **Primary Users:** Same as Bill Payers but can also create and Manage all users and manage their organisation's account.
- **Bill Payers:** Same as Bookers but can also add and manage payment methods and edit and create other Bookers or Bill Payers.
- **Bookers:** All Service Bookers (i.e. they can book against all current and future services on their client account), or Restricted Service Bookers, (i.e. they can only book against the services to which they are assigned)
- When adding or editing a Booker, you will be asked which Services you would like them to book against.
- Click on 'All Services' if you want book against all the Services listed for your organisation.
- Or click on 'Select Services' to select which Services you would like them to book against.
- Click on **[SUBMIT]**.



Managing Existing Users

- Log into your *NHS Open Space* account and navigate to the **[Accounts]** page.
- Select the view all button.
- You now have access to every current user linked to your organisation.



Edit or Remove the User

- Click on **[EDIT]** next to the user's name.
- You can now change the names, phone numbers, email addresss and the User Role.
- Select the **[SAVE]** button to confirm any changes made to a user's roles.
- To remove a user, untick the **[Active User?]** option in the top right corner of the box and they will no longer be an active user for your organisation.
- They can be re-activated at any time by ticking **[Active User?]**.



Edit user Active User?

Paula Sugden

Phone Number Mobile Number

paula.sugden@lthtr.nhs paula.sugden@lthtr.nhs

User Role
 Primary User ✓

SAVE