

# How To: Add a User to a Strategy in Partner Portal



Last Modified on 10/25/2023 2:50 pm EDT

## Overview

This guide will walk you through creating a new user inside the Partner Portal for a strategy.

## Instructions

### Step 1:

Log in to the Partner Portal for your environment.

**NOTE:** The link to your environment can be found here: [Partner Portal](#)

### Step 2:

Log in to the Partner Portal.

The screenshot shows a login form titled "Login to the Updox Partner Portal". It contains two input fields: "Email address" with an '@' icon and "Password" with a lock icon. Below the password field is a blue "Login" button and a link that says "Forgot your password?".

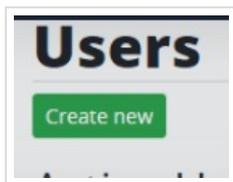
### Step 3:

Once you have successfully entered, navigate to **Menu**. Then select **Users**.

The screenshot shows the dashboard of the Updox Partner Portal. On the left is a dark sidebar menu with options: Home, Account Verification, Accounts, Audit Log, Users (highlighted in yellow), Webhooks, and PHI Directive. The main content area is titled "Welcome to the Updox Partner Portal" and shows a "last login: 2021-08-06 13:13:13 -0400" timestamp. Below this is a summary card for "Accounts" showing "Active accounts: 255" and "Inactive accounts: 20". A "What's New — July 2021" section is also visible, containing a "PHI Directive" announcement.

### Step 4:

Click the **Create New** button.



### Step 5:

You will be prompted with a few empty fields to fill out. Enter the user's name and email address.

A screenshot of a form titled "Create a new user". The form has three input fields: "First name" with the value "Tim", "Last name" with the value "Tester", and "Email" with the value "TimTester@updox.com". At the bottom left of the form are two buttons: "Create" (in blue) and "Back" (in grey).

Once finished, click **Create**.

### Step 6:

Next, find the User you just created within the user list. Then click **Details** in order to update the user's level.

A screenshot of a user profile page for "Tim Tester". The name "Tim Tester" is at the top in large, bold, black font. Below it, there is a list of user details: "registered 2 minutes ago", "email address timtester@updox.com", "active" with a checked checkbox, "access Basic", "current status Awaiting confirmation", "last seen", and "login count 0". There are two buttons: "Inactivate this user" (in red) and "Update access to..." (in blue). The "Update access to..." button has a dropdown menu open showing three options: "Admin", "Manager", and "Basic". Below the details is a section for "Audit logs" with the text "What has Tim done?" and "Nothing yet".

#### NOTE:

- Admin(s) can create Partner Portal users and change permissions of users in the Partner Portal.
  - Only "Managers" are able to create and manage Partner Accounts.
  - "Basic" is read-only.