

HOW TO

# CREATE A CUSTOMER ACCOUNT AND ADD A USER

Creating a customer account allows you to organise maps and jobs by customer. Adding a user to the customer account will allow the user to login to TracMap and view and create their own maps and orders for you.

Your contractor package with TracMap must include Extended Reporting to allow reports to be sent to your customer.

This document covers:

[Creating an account for a customer and adding a user](#)

**P2**

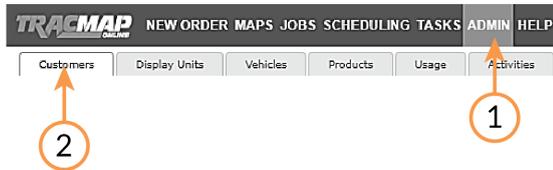
[Adding a user to an existing account](#)

**P3**

[Resetting a password for your customer](#)

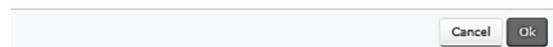
**P5**

## CREATE A CUSTOMER ACCOUNT AND ADD A USER



1. Click 'Admin'
2. Click 'Customers' tab if not already selected

3. The **Add New Customer** screen will appear
4. Enter the name of the account
5. Chose the **Parent Account**. This will be your account
6. If your customer is to receive reports, select the default report set they will receive when a job is completed. Note: this report set can be changed at any time after your customer's account is created



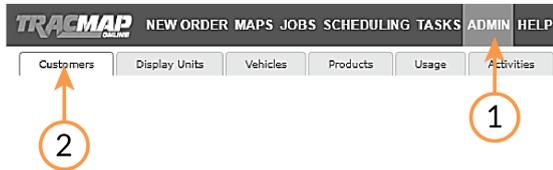
The document [How to Set Up a Customer to Receive Reports](#) covers the remaining steps necessary to ensure your customer will receive reports

7. Click 'User Details' tab
8. Complete 'User Full Name' field
9. Complete 'User Email' field
10. Click 'OK'

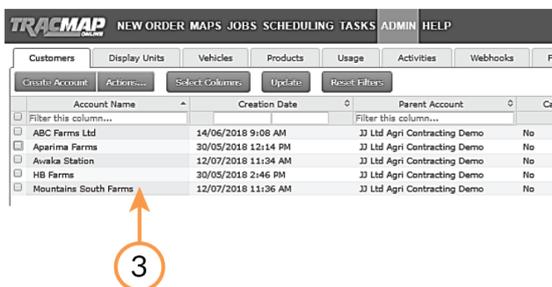
An account and a user have now been created. To add more users to the account, see the section below Adding a User to an Existing Account.

## ADDING A USER TO AN EXISTING ACCOUNT

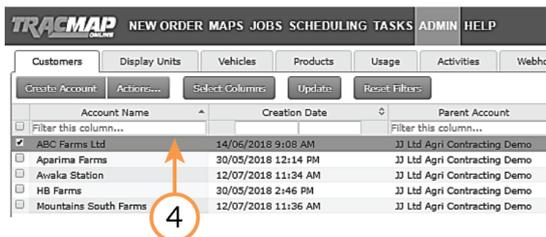
Users can be added to existing customer accounts.



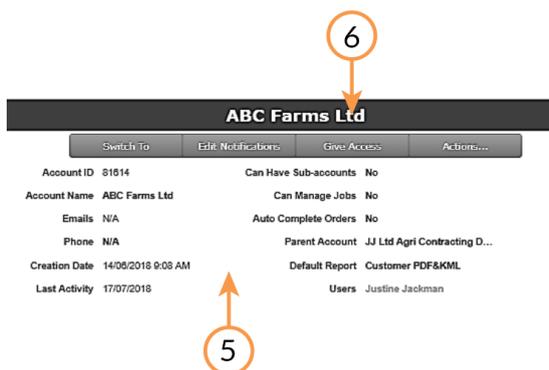
1. Click 'Admin'
2. Click 'Customers' tab if not already selected



3. Your customers accounts will display



4. Click on the customer that needs the user added



5. The details of the customer will appear

6. Click 'Give Access'

**Invite User** ✕

7

Name

Email

 8

Note to recipient (will be added to the email)

Default ▾

9

Cancel Send

7. Enter the name of the user
8. Enter the email address of the user
9. Click 'Send'

**ABC Farms Ltd**

Notifications Give Access Actions...

Can Have Sub-accounts No

Can Manage Jobs No

Auto Complete Orders No

Parent Account JJ Ltd Agri Contracting D...

Default Report Customer PDF&KML

Users Justine Jackman  
Jim Smith (Pending)

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10. Once the invite is sent, the user will show as pending until invitation has been accepted

*Note: At any time while the user status is pending, the invite can be cancelled*

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11

11. To cancel a pending invite, click on the pending user

**Invitation pending for Jim Smith** ✕

Justine Jackman

Jim Smith

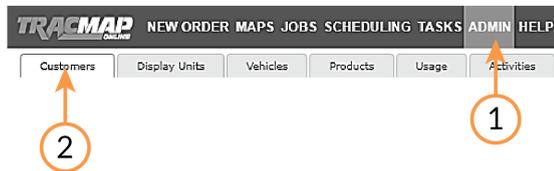
12 → Revoke Invitation

Done

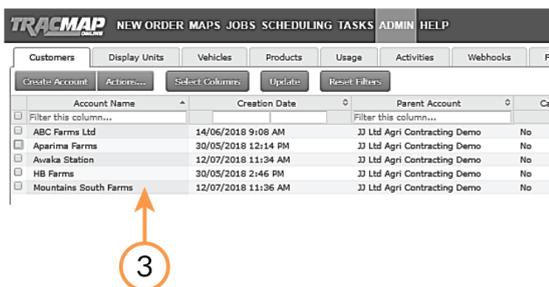
12. Click 'Revoke Invitation'

## RESETTING A PASSWORD FOR YOUR CUSTOMER

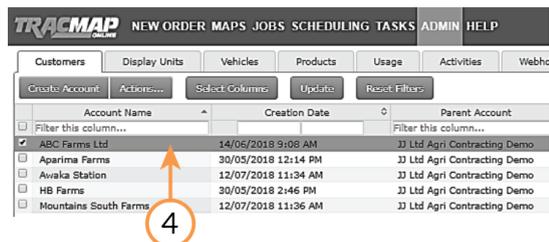
If a user needs a new password for any reason, they will need to have a password reset link sent to them.



1. Click 'Admin'
2. Click 'Customers' tab if not already selected



3. Your customers accounts will display

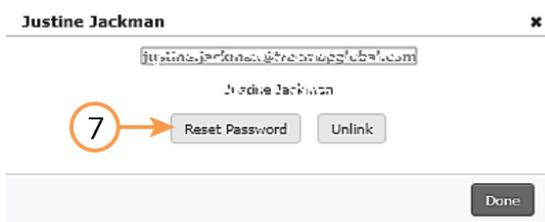


4. Click on the customer



5. The users with access to the account will show in the customer details

6. Click on the user name



7. Click 'Reset Password'

An email will be sent to the user, with instructions and a link to be followed for resetting a password.