

How to Set Up Subusers on Your Account

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How to Set Up Subusers on Your Account

- This guide provides step-by-step instructions on how to create and manage sub users within your account.
- Sub users allow multiple inspectors to operate under a single main account while maintaining their own individual profiles and details.
- This feature is especially useful for teams or businesses where more than one inspector uses the same device or system.

Sub users allow multiple inspectors to operate under a single account, each with their own individual details and profiles. This is especially useful when more than one inspector is using the same device, as it enables quick switching between users without needing to sign in and out of separate accounts. This guide will walk you through how to set up and use sub users effectively.

01 Prerequisites

Before setting up sub users, there are a couple of important requirements to keep in mind. Sub users cannot be created from an admin account. Instead, you'll need to be logged into a non-admin account. This account must also have been invited to join the organization. Once you're using the correct account type, you'll be able to access and set up sub users without any issues.

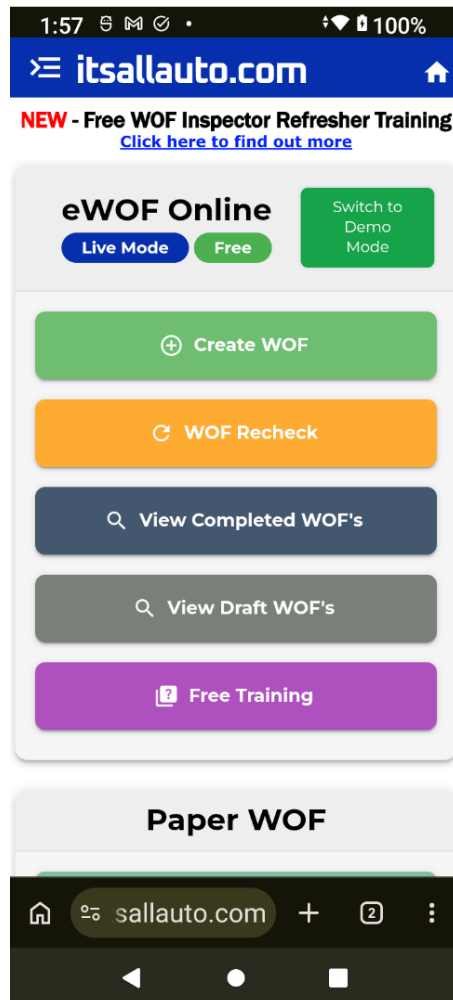
If you are unfamiliar with the invite process, please refer to our guide called "How to invite users to your organization"

Prerequisites

- Sub users cannot be set up on an admin account.
- Sub users can only be set up on a non-admin account that was invited to the organization.
- Ensure you are logged into the correct account type before attempting setup.
- Refer to "How to invite users to your organization" for step-by-step guidance on how to invite users
- Access video guides via: itsallauto.com → Training/Set Up → How it Works

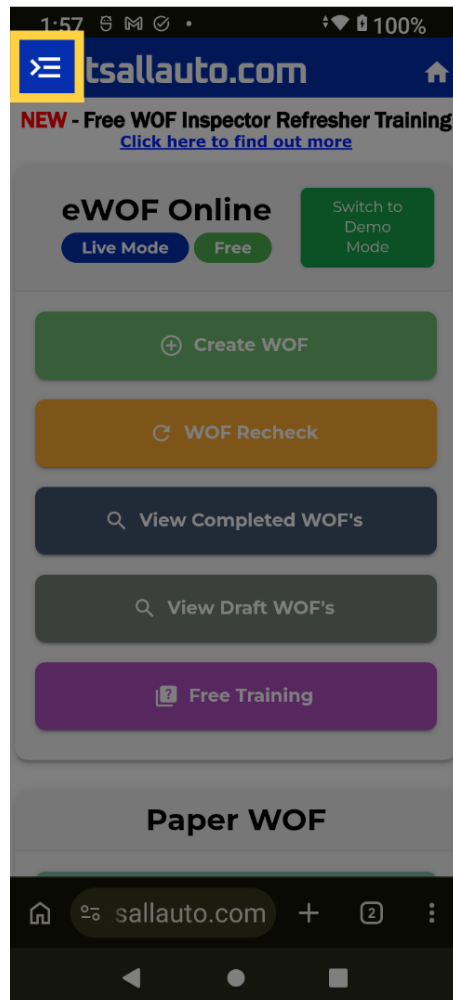
02 Prerequisites Done

Assuming that the previously described prerequisites are done, you should be ready to start the set up for sub users on your currently signed in account.



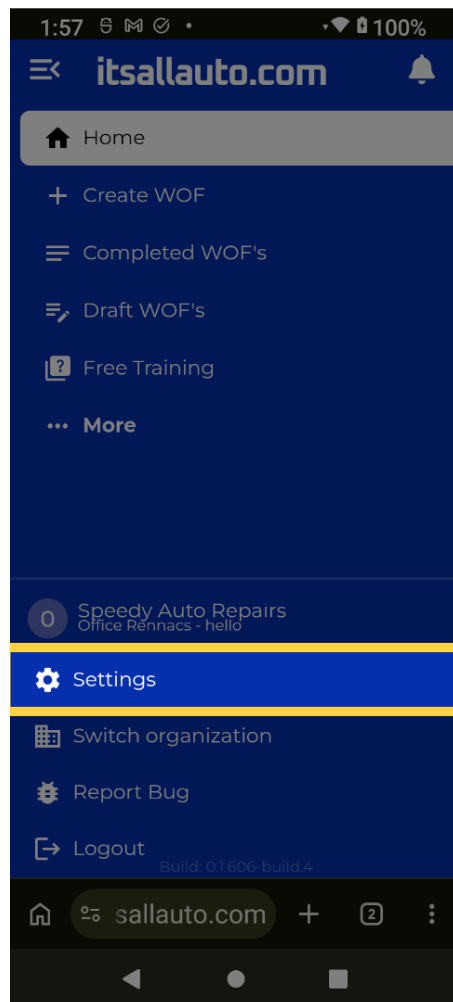
03 Open Sidebar

You'll need to go to the settings by first opening up the sidebar using the icon of the 3 horizontal lines in the top left.



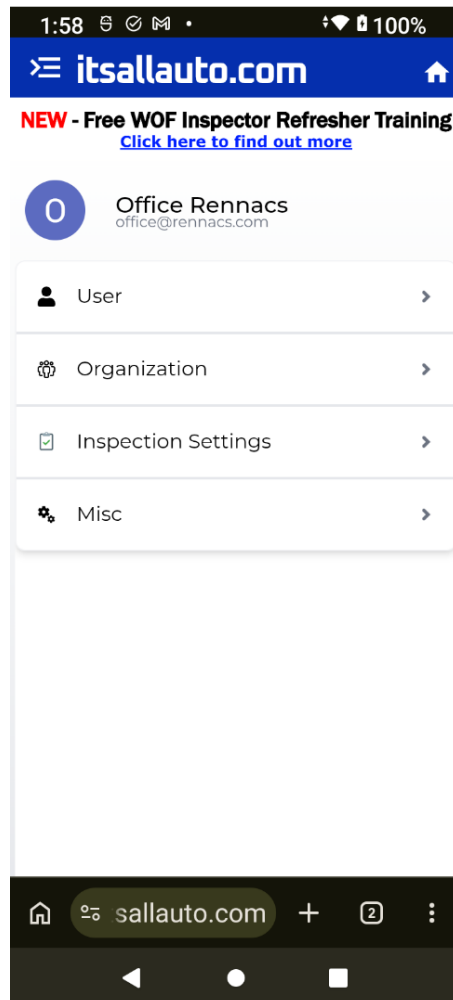
04 Open Settings

And then select the "Settings" option.



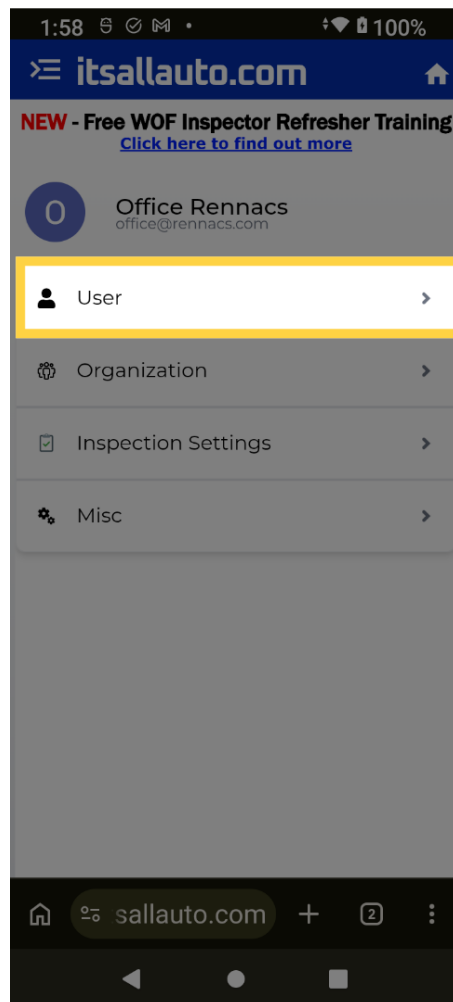
05 Settings Page

After doing that, you should now be on the settings page. If you are on desktop or tablet, the User settings might be already open.



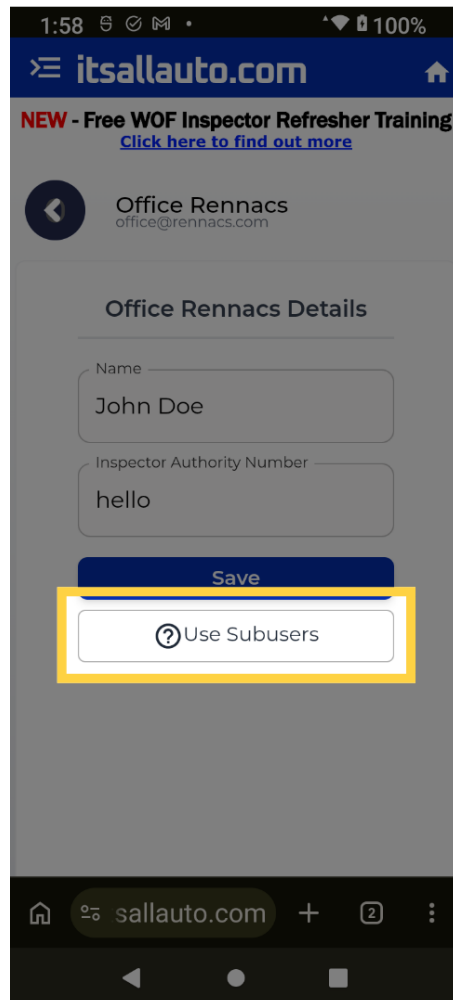
06 Open User Settings

If not, then you will need to select the "User" option.



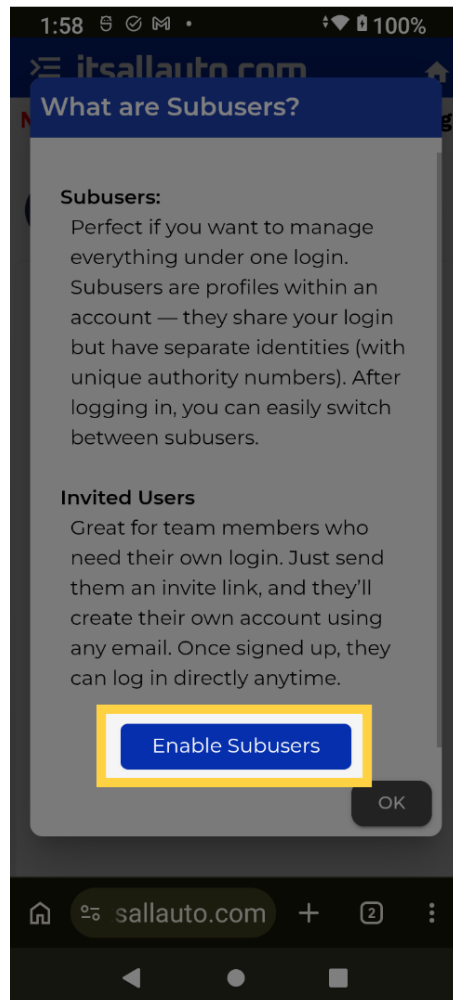
07 Select "Use Subusers"

You should now be on the page for editing user settings. From here there should be a button for enabling sub users.



08 Select "Enable Subusers"

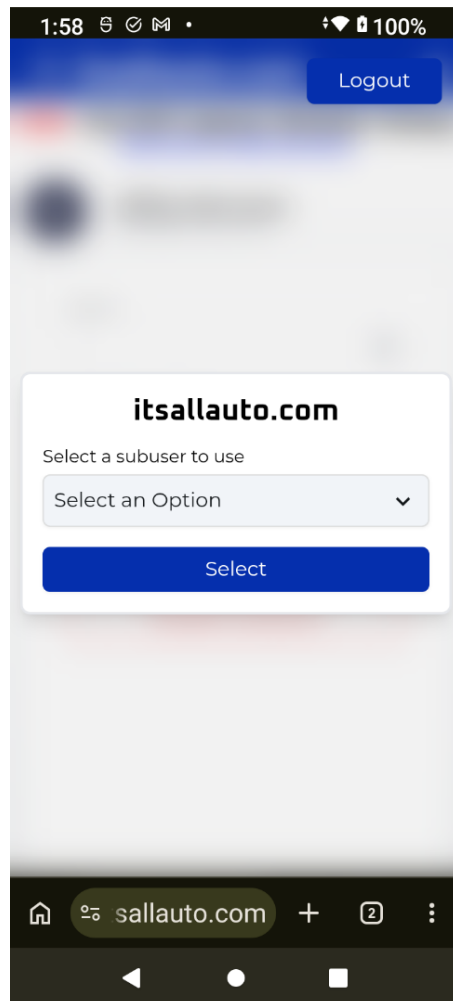
A confirmation dialog should show up explaining what sub users are. After reading this, click the button that says "Enable Subusers".



09 Select a User

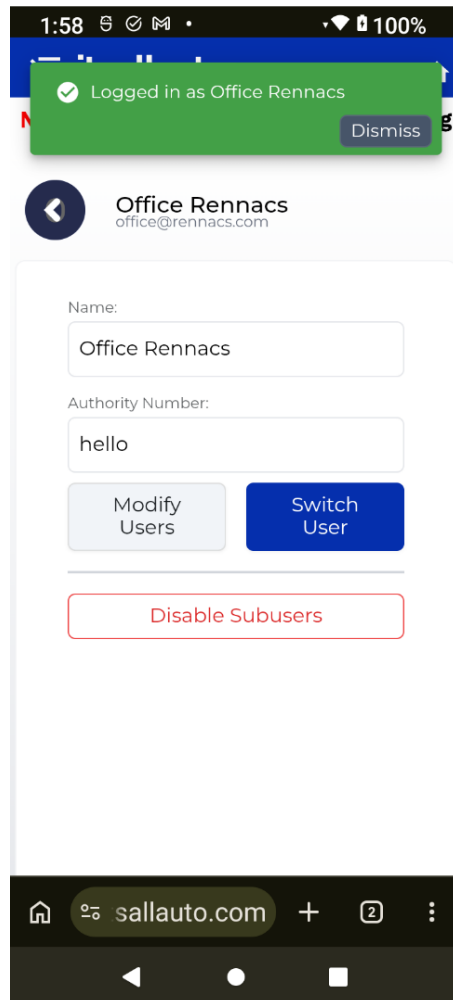
After sub users become enabled, your page should refresh and prompt you to select a user.

By default there will be one user already that will have the details of the original user. You will need to select that user for now in order to continue to with setting up more sub users.



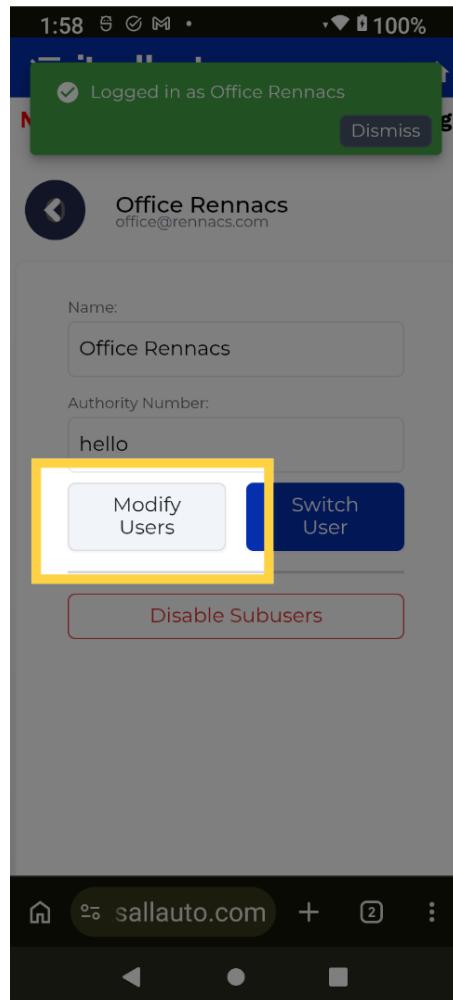
10 Sub Users Menu

After selecting a user, you should now be on the page to manage sub users.



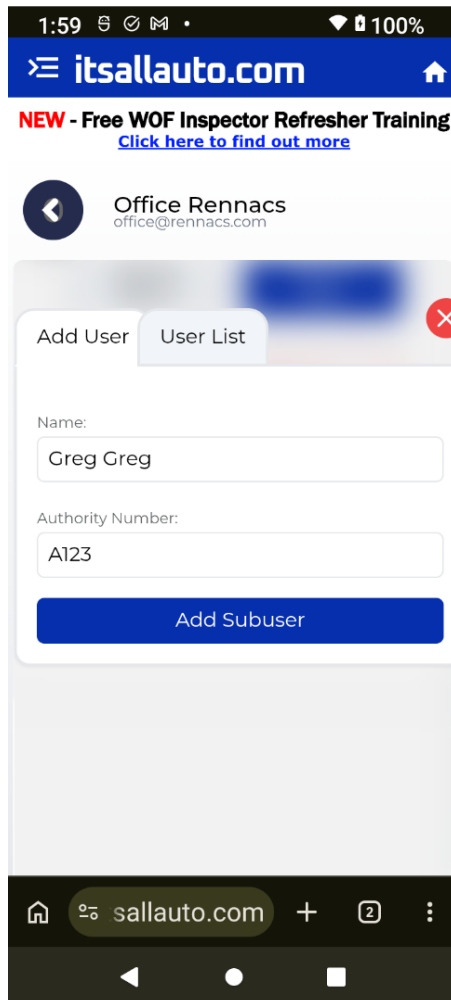
11 Selecting "Modify Users"

To add more sub users, click the "Modify Users" button.



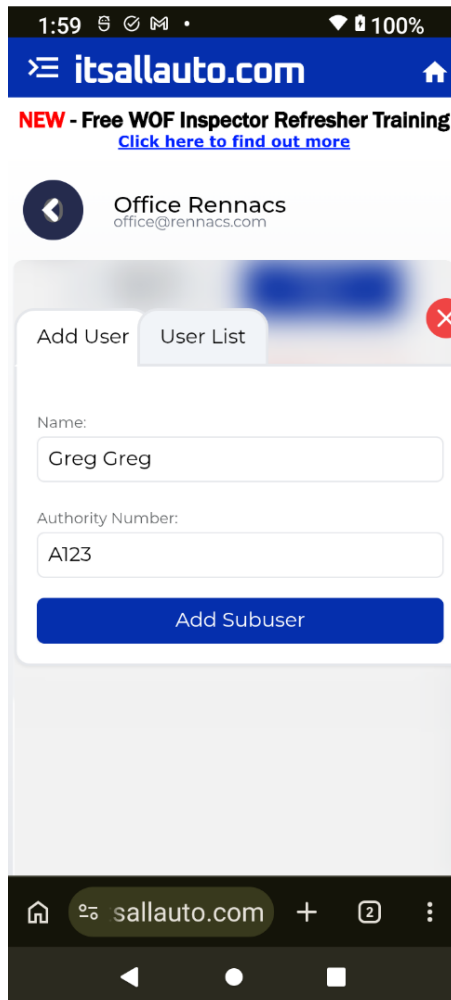
12 Add User

You should now have the option of entering the details of the new sub user and adding them.



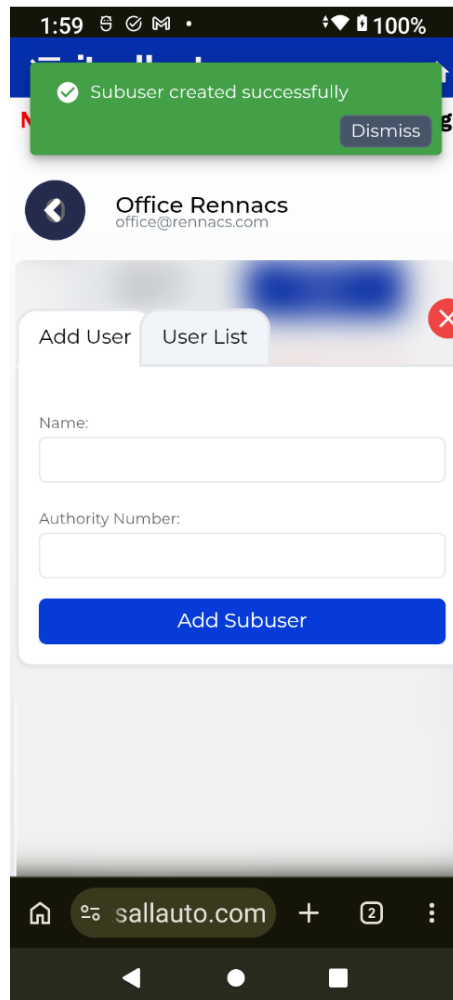
13 Enter Details and Add Subuser

After entering the details of the new sub user, click on the "Add Subuser" button.



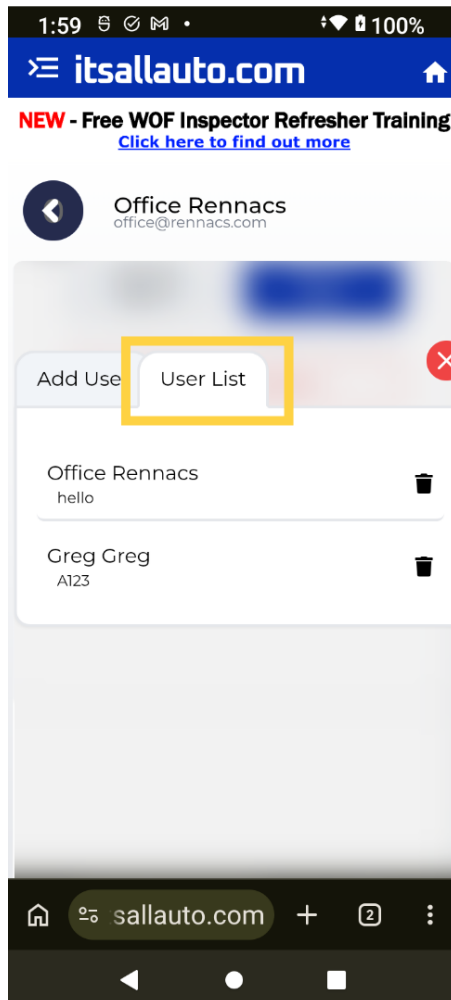
14 Add Subuser Success

After adding the new subuser, you will see it is successful when it displays a green snackbar saying "Subuser created successfully"



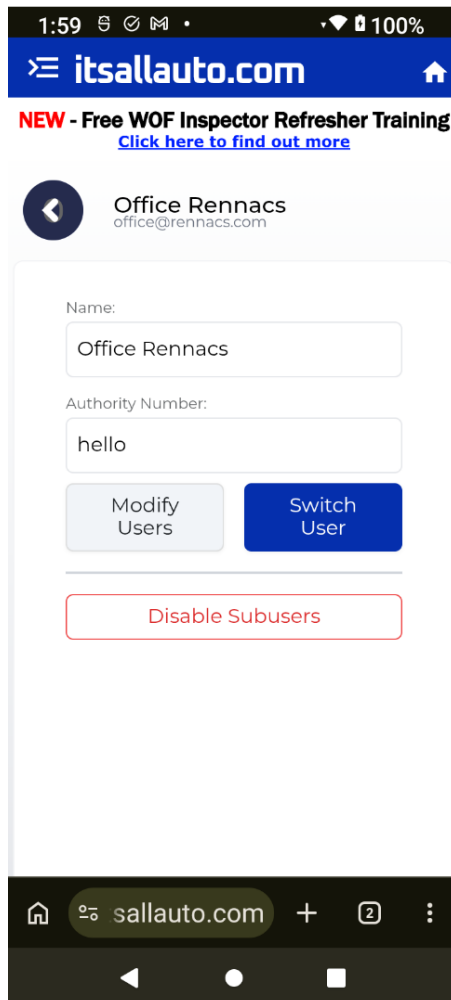
15 Confirming Sub User Has Been Added

You can also confirm the sub user has been created by going in to the "User List" tab.



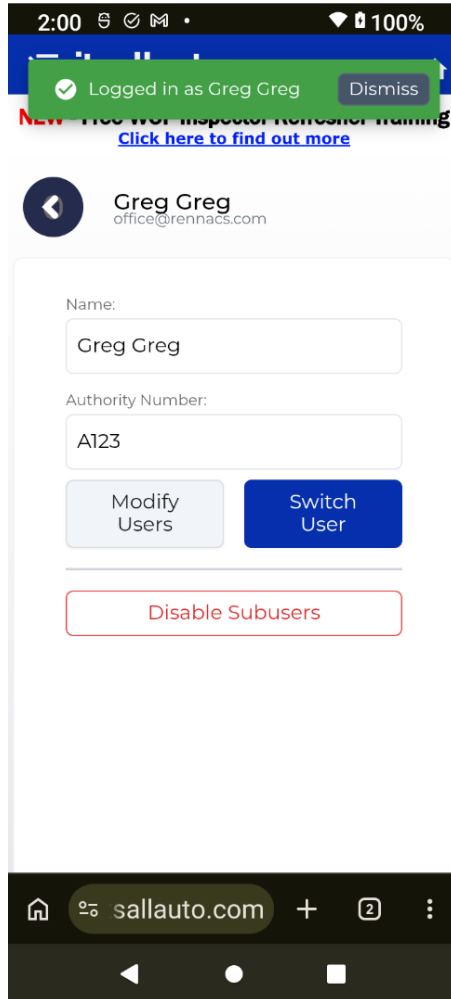
16 Switching the Sub User

To switch the current sub user, simply click the Switch User button. This should bring up a dialog for you to select a user, similar to when you first enable sub users on the account.



17 Confirm Selected Sub User Details

After selecting the sub user, it should now show the details of currently selected one.



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