

Create a User Account

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You can create a **user** to add an account holder by entering personal and system-related information. For example, you can enter a user ID and email address, and assign this user to an organization. When you assign the user to an organization, you define the data he or she can access.





You can also specify a date range for account access. Doing so ensures that the user can log in *only* during the specified date range.

To learn about user account data fields, see [User Account Data Fields](#).

Step-by-Step






(Click  to view image)

1. From **Setup**, select **Users**. 
2. Click **Select Tasks**, select **Create / Edit Users**, and click **Start**. 
3. Type/Select the user information. 
4. Click **Create**. 

Effects

After you create a user, you can view user account information.

▼ To view user details...

1. From **Setup**, select **Users**. 
2. Type a user name into the search field, and click **Search**. 
3. Click the information icon in the **Username** column. 

*If this column does not display, click **Manage Columns**, select **Username**, and click **Apply**.*

What's Next?

▼ When you enter an email address for a new user...

It serves as the username. This is true even if you previously entered a different username.

You can change the username after you enter the email address, but *you must do so before you click **Create***.

After you create an account, the system sends an email to the new user. If the email is returned, undelivered, the system displays an email delivery failure.

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