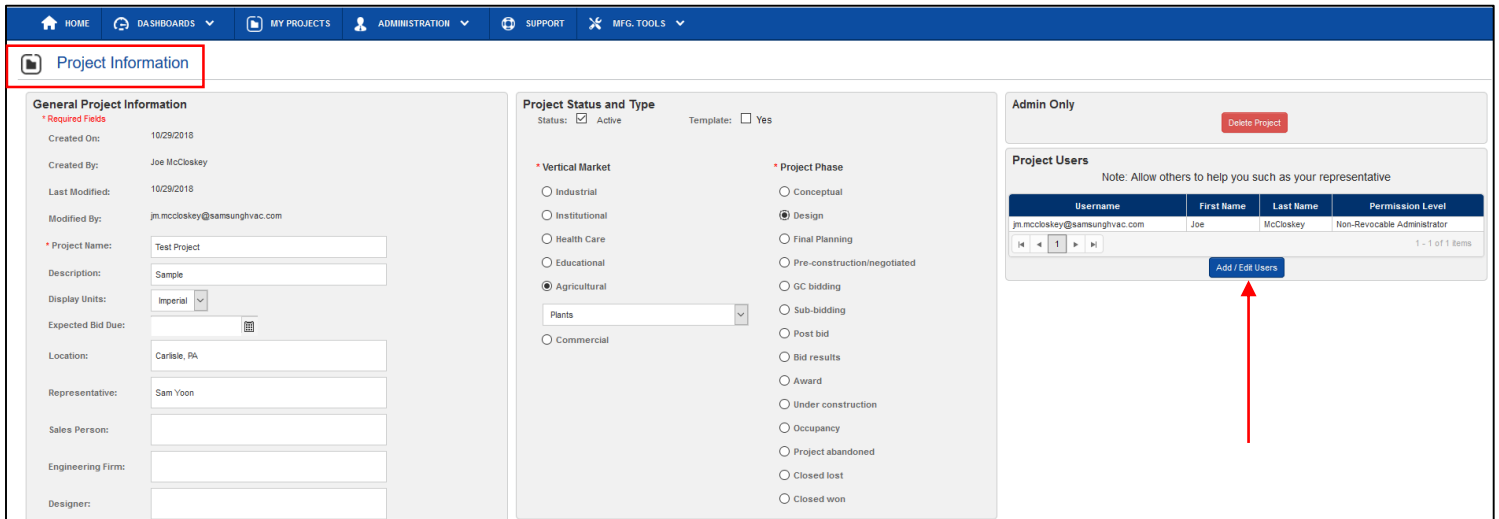


## Adding Users to a Fresh Access™ Project

Additional users can be added to a project in Fresh Access™ Pro when creating a project or after a project has been created. Adding or editing users is done on the **Project Information** page. Click on the “Add/Edit Users” button.



**Project Information**

**General Project Information**

Created On: 10/29/2018  
 Created By: Joe McCloskey  
 Last Modified: 10/29/2018  
 Modified By: jm.mccloskey@samsunghvac.com  
 \* Project Name: Test Project  
 Description: Sample  
 Display Units: Imperial  
 Expected Bid Due:  
 Location: Carlisle, PA  
 Representative: Sam Yoon  
 Sales Person:  
 Engineering Firm:  
 Designer:

**Project Status and Type**

Status:  Active Template:  Yes

\* Vertical Market

- Industrial
- Institutional
- Health Care
- Educational
- Agricultural
- Commercial

Plants

\* Project Phase

- Conceptual
- Design
- Final Planning
- Pre-construction/negotiated
- GC bidding
- Sub-bidding
- Post bid
- Bid results
- Award
- Under construction
- Occupancy
- Project abandoned
- Closed lost
- Closed won

**Admin Only**

Delete Project

**Project Users**

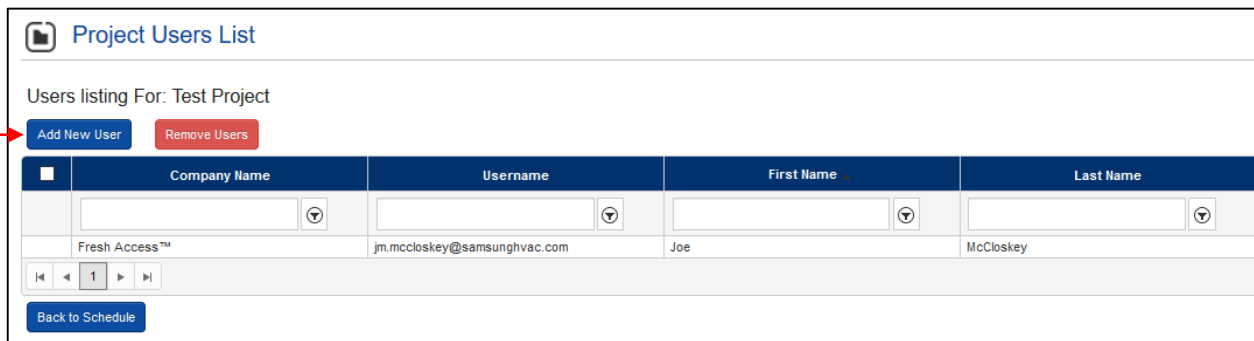
Note: Allow others to help you such as your representative

Username	First Name	Last Name	Permission Level
jm.mccloskey@samsunghvac.com	Joe	McCloskey	Non-Revocable Administrator

1 - 1 of 1 Items

Add/Edit Users

In the **Project Users List** screen, click the “Add New User” button. Search by name or email in the pop-up window. Additional users will populate based on search criteria entered. Click the “+” symbol to add the appropriate users.



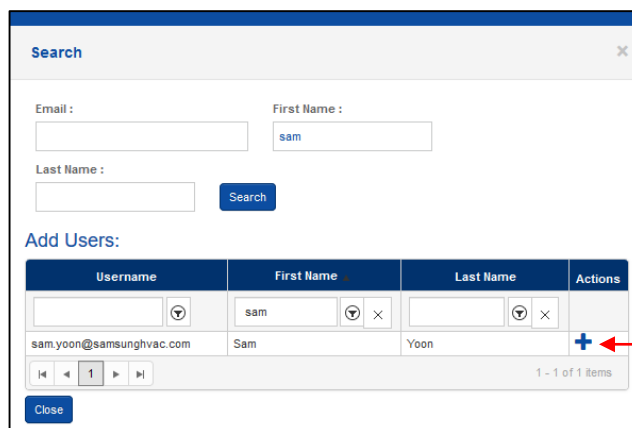
**Project Users List**

Users listing For: Test Project

Add New User Remove Users

Company Name	Username	First Name	Last Name
Fresh Access™	jm.mccloskey@samsunghvac.com	Joe	McCloskey

Back to Schedule



**Search**

Email: First Name: sam

Last Name:

Search

**Add Users:**

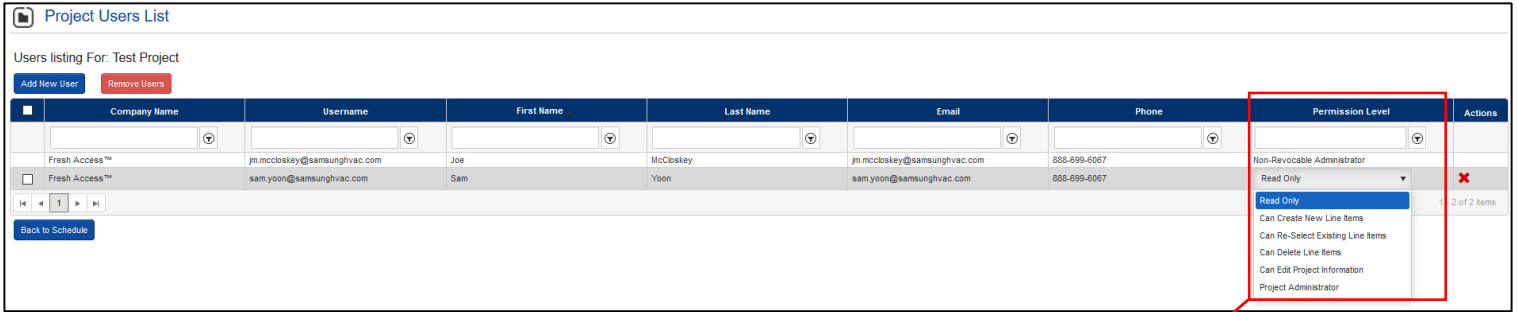
Username	First Name	Last Name	Actions
sam.yoon@samsunghvac.com	Sam	Yoon	+

1 - 1 of 1 Items

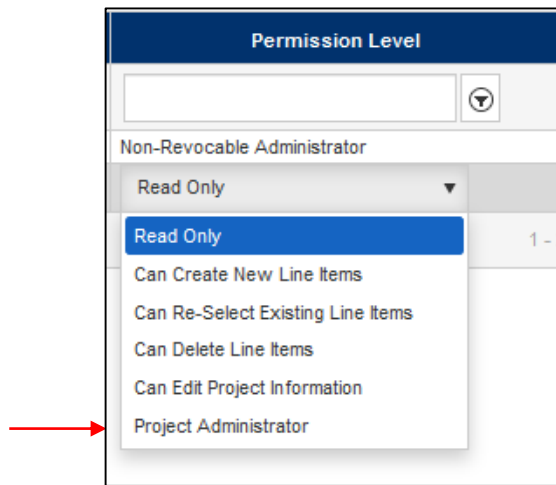
Close

## Adding Users to a Fresh Access™ Project

After selecting a new user for your project, set their permission level (default setting is "Read Only"). The permission level being granted will depend on why you are adding them to the project. Generally, you would want to set them as another "Project Administrator" so the new user will have full access to modify the selections within the project.

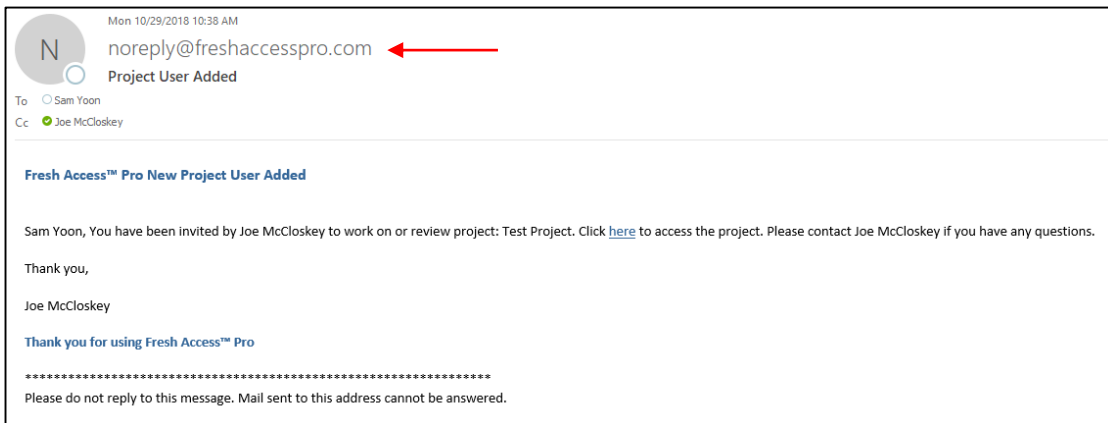


The screenshot shows the 'Project Users List' interface. At the top, it says 'Users listing For: Test Project' with buttons for 'Add New User' and 'Remove Users'. Below is a table with columns: Company Name, Username, First Name, Last Name, Email, Phone, Permission Level, and Actions. Two users are listed: Joe McCloskey and Sam Yoon. A red box highlights the 'Permission Level' dropdown menu for the second user, which is open and showing options: Non-Revocable Administrator, Read Only, Read Only (highlighted), Can Create New Line Items, Can Re-Select Existing Line Items, Can Delete Line Items, Can Edit Project Information, and Project Administrator.



A close-up of the 'Permission Level' dropdown menu. The menu is open, showing the following options: Non-Revocable Administrator, Read Only, Read Only (highlighted), Can Create New Line Items, Can Re-Select Existing Line Items, Can Delete Line Items, Can Edit Project Information, and Project Administrator. A red arrow points to the 'Project Administrator' option.

Your project will now be listed in the new user's **My Projects – Active** page. An automatic email alert will be sent to you and to the new user after adding them to the project.



The screenshot shows an email notification from 'noreply@freshaccesspro.com' with the subject 'Project User Added'. The email content reads: 'Fresh Access™ Pro New Project User Added. Sam Yoon, You have been invited by Joe McCloskey to work on or review project: Test Project. Click [here](#) to access the project. Please contact Joe McCloskey if you have any questions. Thank you, Joe McCloskey. Thank you for using Fresh Access™ Pro. Please do not reply to this message. Mail sent to this address cannot be answered.' A red arrow points to the sender's email address.

**\*\* If an email alert is not received by you or the new user that has been added to the project, please check your "spam" or "junk mail" folders, and add "noreply@freshaccesspro.com" to your safe senders list.**