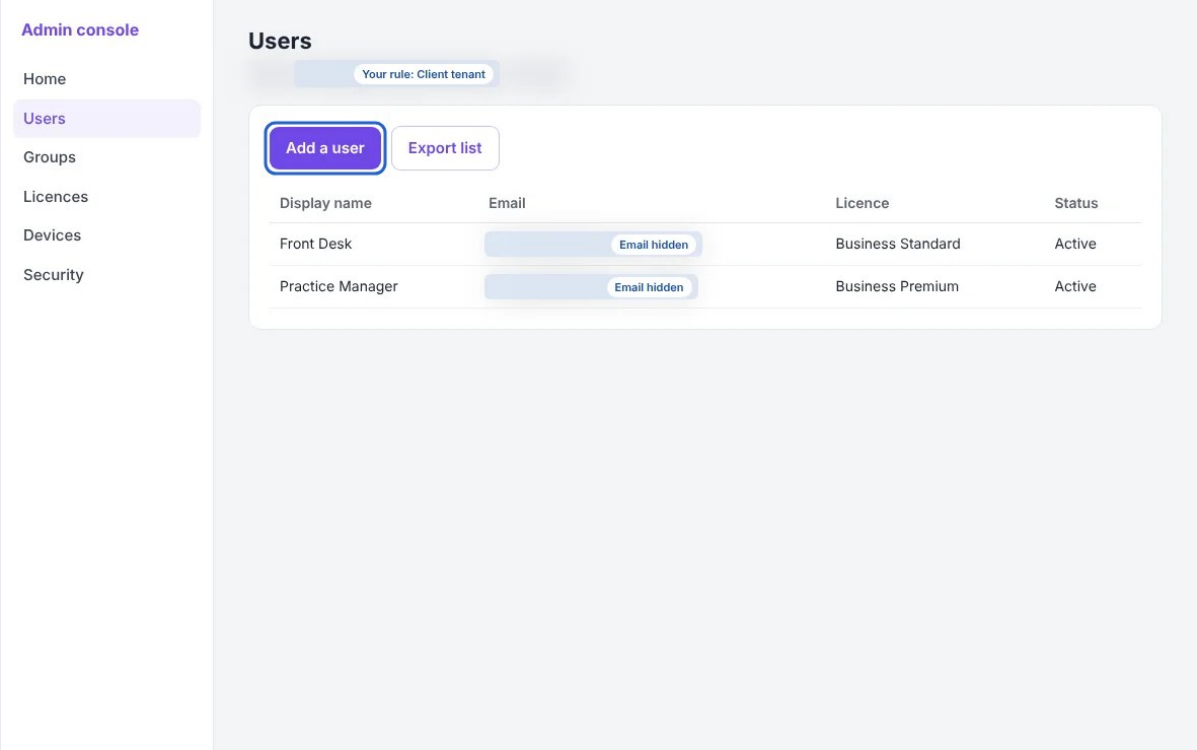
Add a new user and assign a licence

9 steps · Updated November 25, 2026

For service-desk technicians. Creates a user in the client’s admin console, assigns a licence and a group, and sets a temporary password.

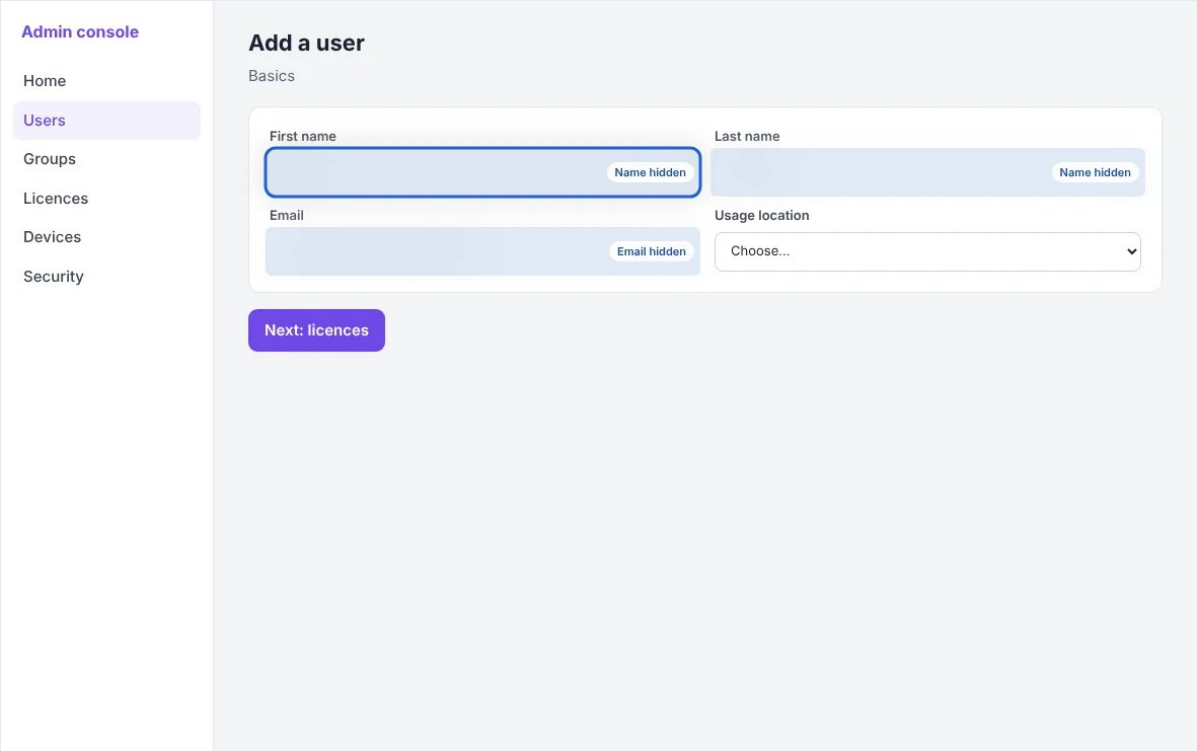
1 Click Add a user

Check the client name under **Users** first, so you are in the right client's console.



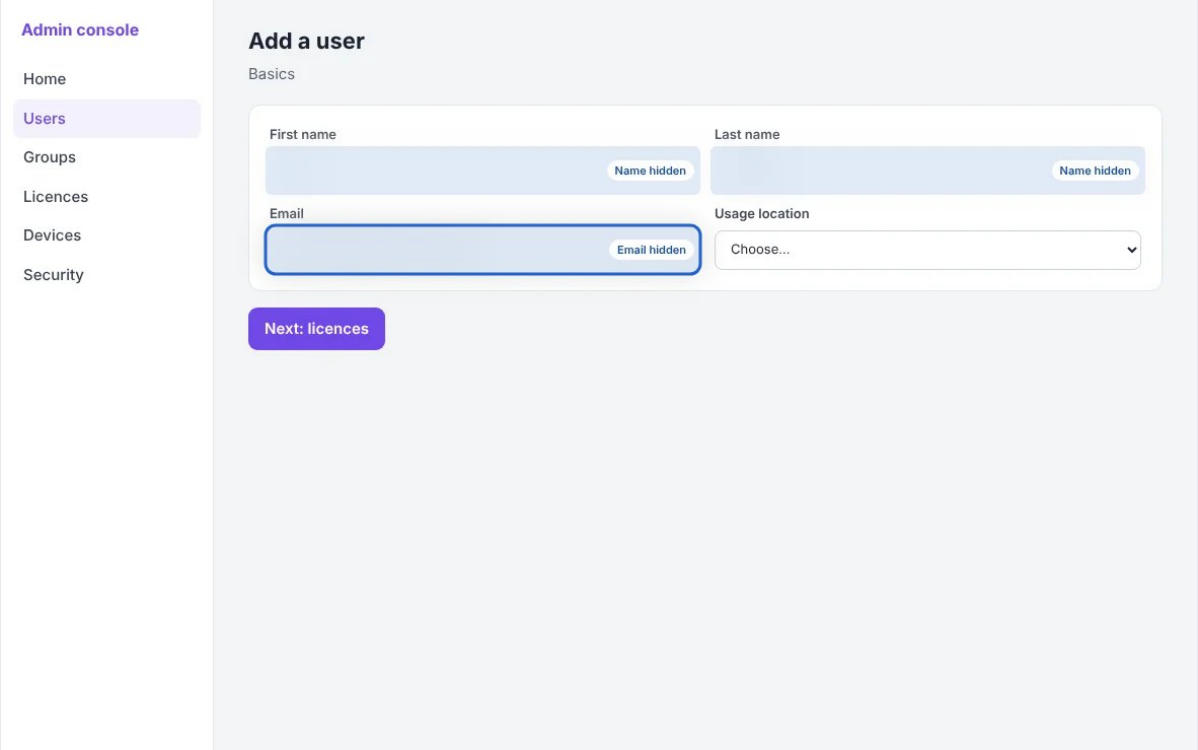
2 Enter the first and last name

Copy the name exactly from the client's new-starter form.



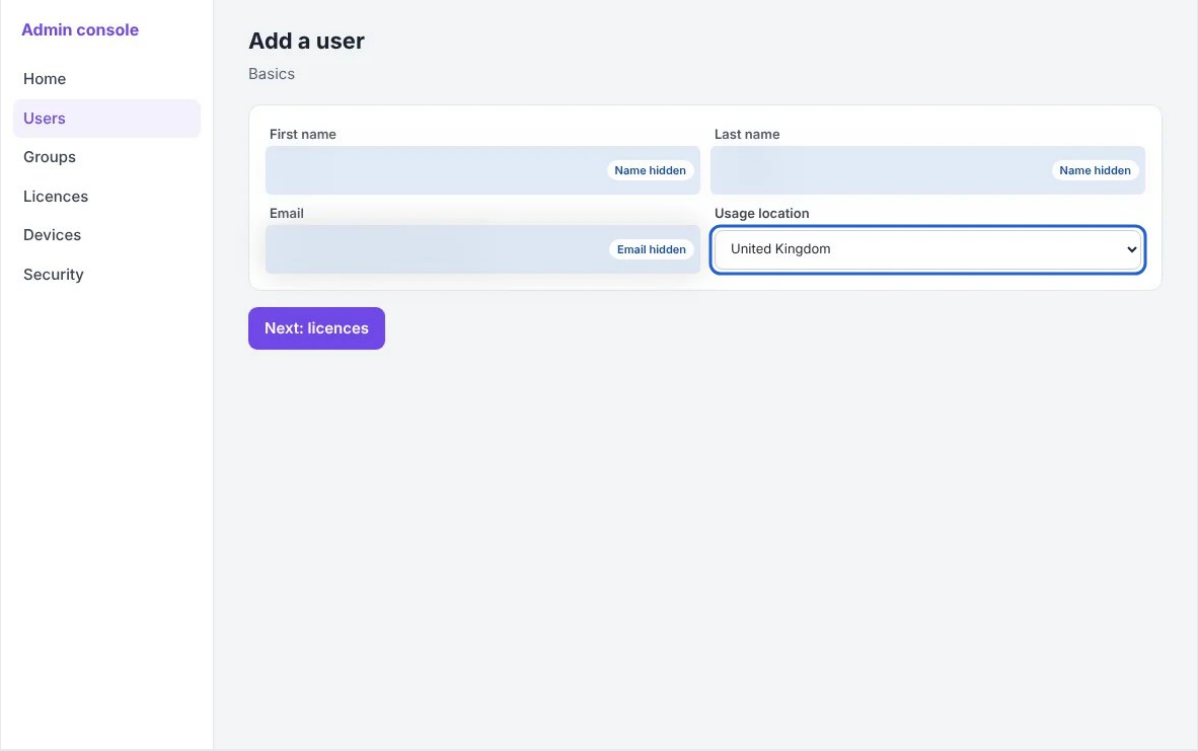
3 Enter the email address

Follow the client’s format, for example initial.surname@ their domain.

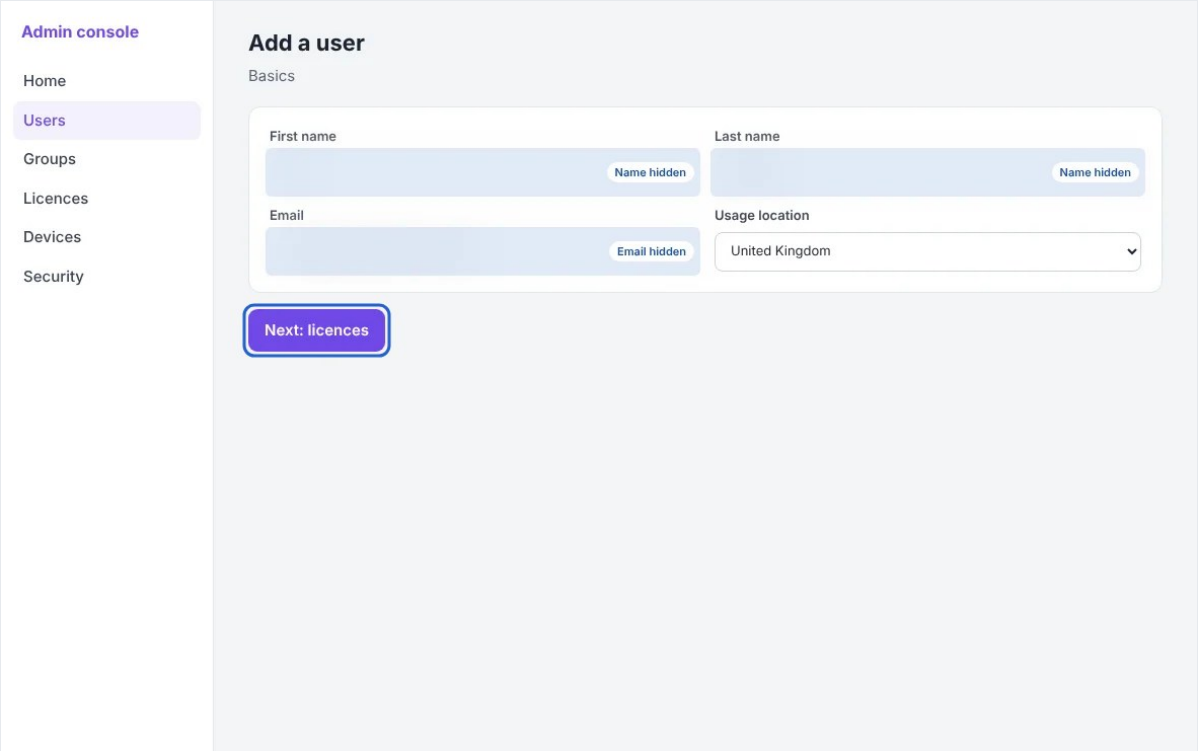


4 Choose United Kingdom in Usage location

A licence can’t be assigned until a usage location is set.

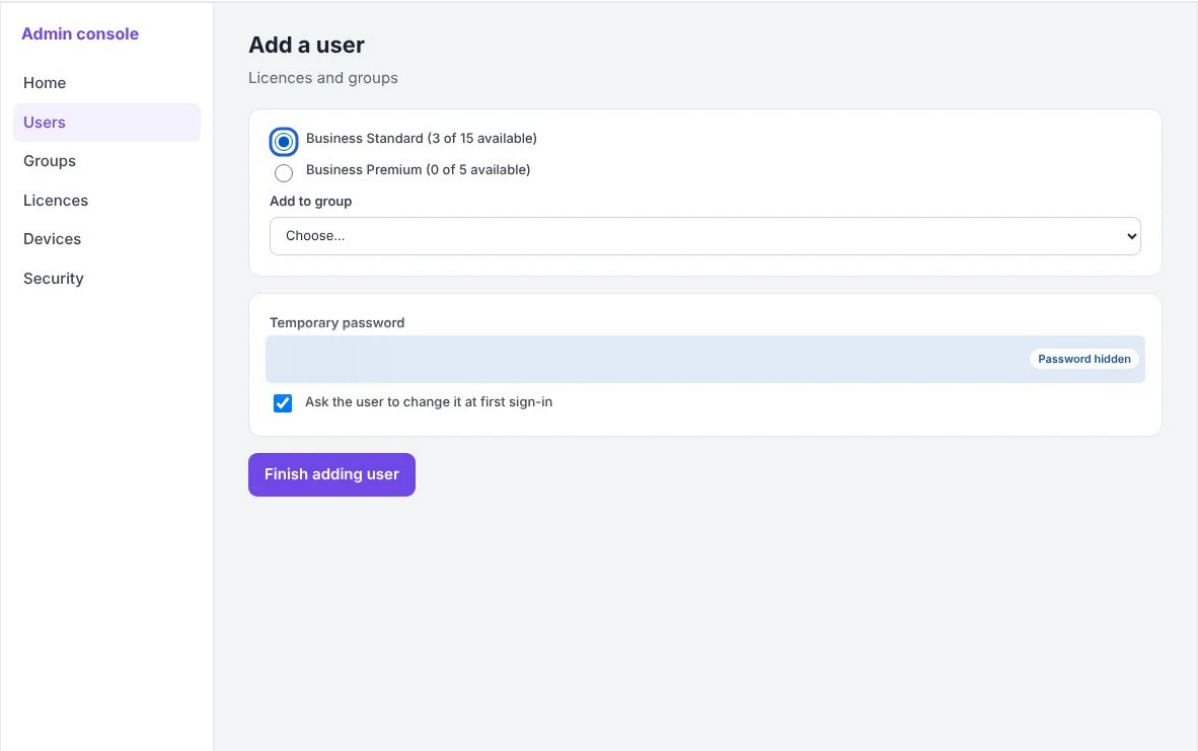


5 Click Next: licences

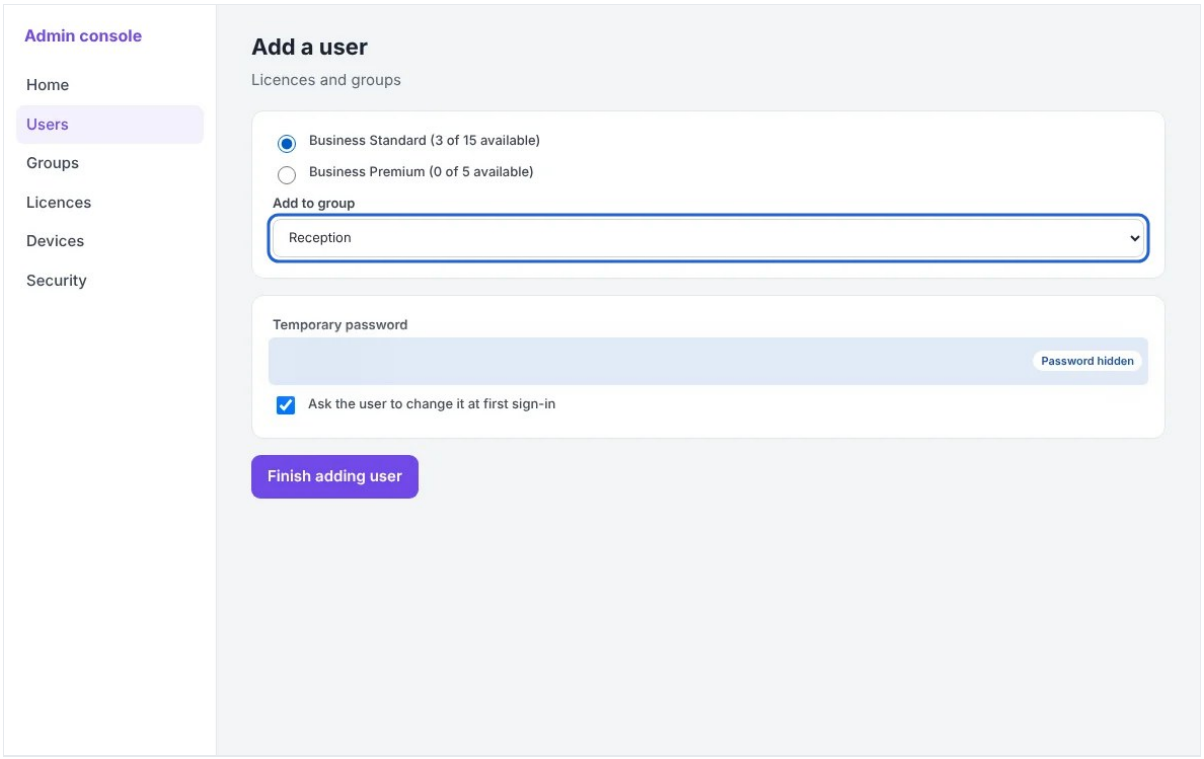


6 Click Business Standard (3 of 15 available)

If no licences are free, stop and ask the client to approve a new one before you go on.

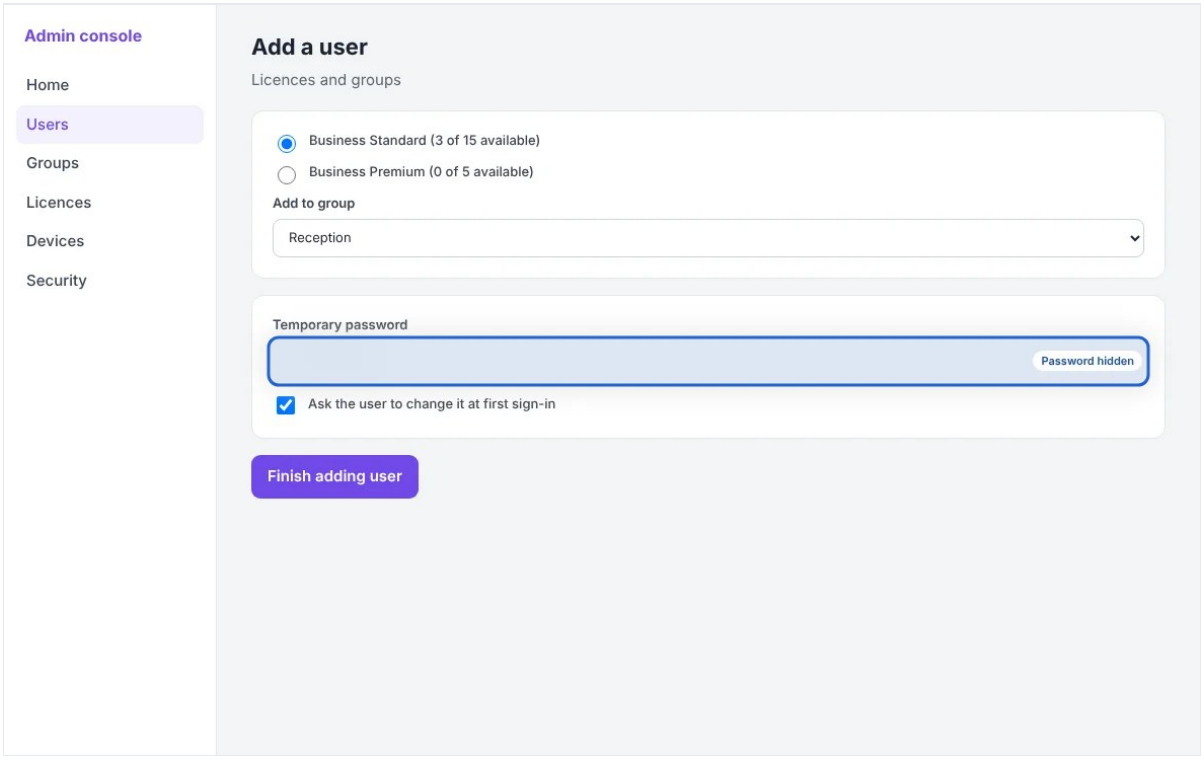


7 Choose Reception in Add to group



8 Set a temporary password

Leave **Ask the user to change it at first sign-in** ticked.



9 Click Finish adding user

Send the sign-in name and the password by different channels, for example the email to the practice manager and the password by text.

