



Add and Manage Users

Help Article

Published: 27 March 2025

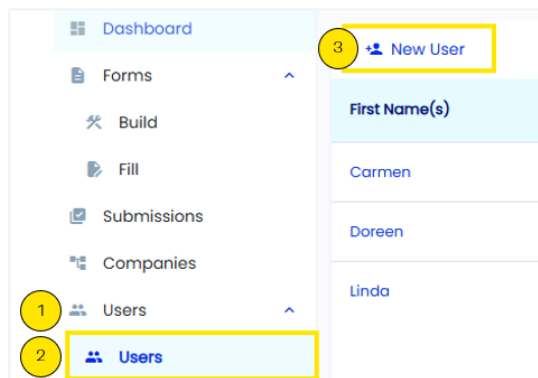
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1. Add and Manage Users

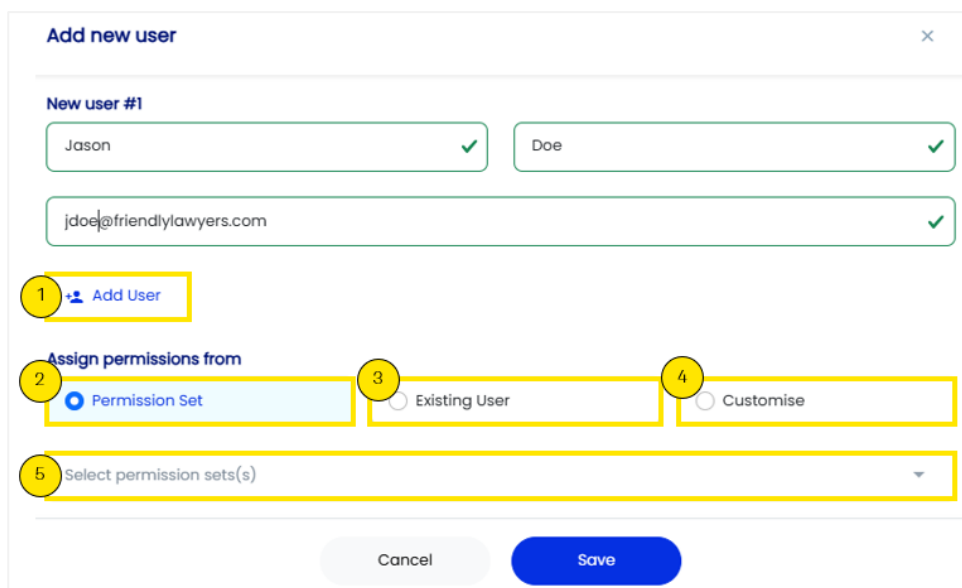
When new users need to be added to your Smarter Drafter environment:

1. Click Users in the navigation menu.
2. Click Users.
3. Click New User.



The **Add new user** pop-up opens. Enter the user’s details under **New user #1**.

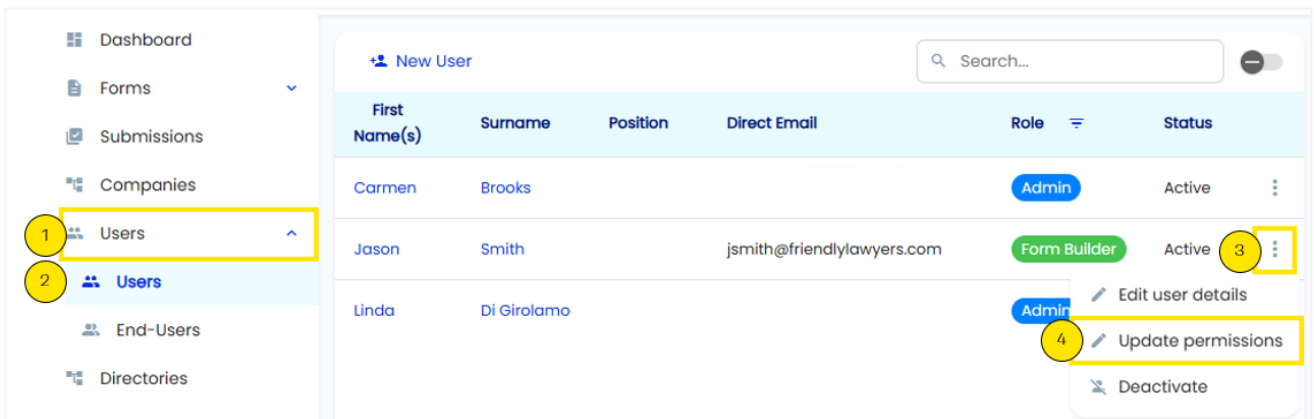
1. If there are multiple users to be added with the same permissions, click **Add User** to add user #2.
2. To select a predefined Permission Set for the user/s, click **Permission Set** and select the permission set from the **list (5)**. (Refer to the [User Permissions Help Guide](#).)
3. Click **Existing User** to copy the permissions of an existing user by selecting a name from the **list (5)**.
4. Click **Customise** to set up a new set of user permission. (Refer to the [User Permissions Help Guide](#).)
5. Click **Save**.



1.1 Editing User Profile and Permissions

To reopen user profiles and edit their permissions:

1. Click Users in the navigation menu.
2. Click Users.
3. Click the ellipsis beside the user's name.
4. Click Update permissions.



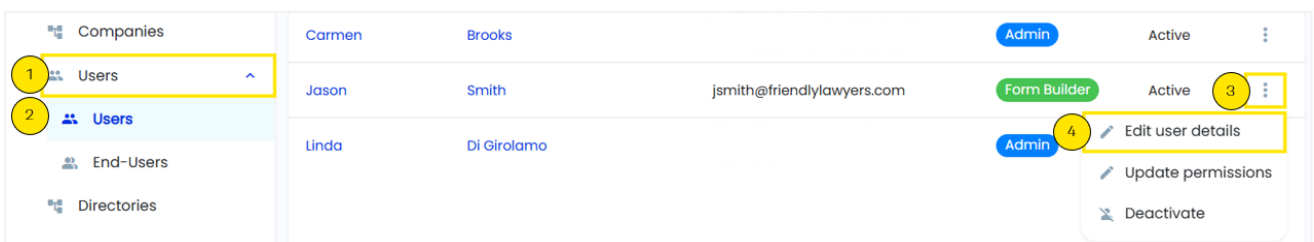
The screenshot shows the 'Users' management page. On the left, a navigation menu has 'Users' highlighted with a yellow box and a '1' in a yellow circle. Below it, another 'Users' link is highlighted with a yellow box and a '2' in a yellow circle. The main table lists three users: Carmen Brooks (Admin, Active), Jason Smith (Form Builder, Active), and Linda Di Girolamo (Admin, Active). The 'Jason Smith' row is highlighted with a yellow box and a '3' in a yellow circle. A dropdown menu is open for Jason Smith, with 'Update permissions' highlighted by a yellow box and a '4' in a yellow circle.

First Name(s)	Surname	Position	Direct Email	Role	Status
Carmen	Brooks			Admin	Active
Jason	Smith		jsmith@friendlylawyers.com	Form Builder	Active
Linda	Di Girolamo			Admin	Active

1.2 Signatures

You can add a signature for a user's profile:


1. Click Users in the navigation menu.
2. Click Users.
3. Click the ellipsis beside the user's name.
4. Click Edit user details



This screenshot is identical to the one above, but the dropdown menu for 'Jason Smith' is open, and 'Edit user details' is highlighted with a yellow box and a '4' in a yellow circle.

- A slide out editor will open, where a signature can be added using the **uploader**. JPG and PNG graphics are acceptable.

Signature



Drag & drop your file here

OR

Cancel
Save

1.3 Deactivating a User

Click the ellipsis beside the user's name in the user list to find the **Deactivate** button. It will remove the user profile from the list. When a user is deactivated, they will no longer be able to log into the platform.

Jason	Smith	jsmith@friendlylawyers.com	Form Builder	Active	⋮
Linda	Di Girolamo		Admin		<ul style="list-style-type: none"> ✎ Edit user details ✎ Update permissions <li style="border: 2px solid yellow;">✎ Deactivate

A deactivated user can be reactivated from the users table by turning on the switch next to the search bar - this will display all the inactive users. Click the ellipsis and click Reactivate to reactivate the user.

+ New User

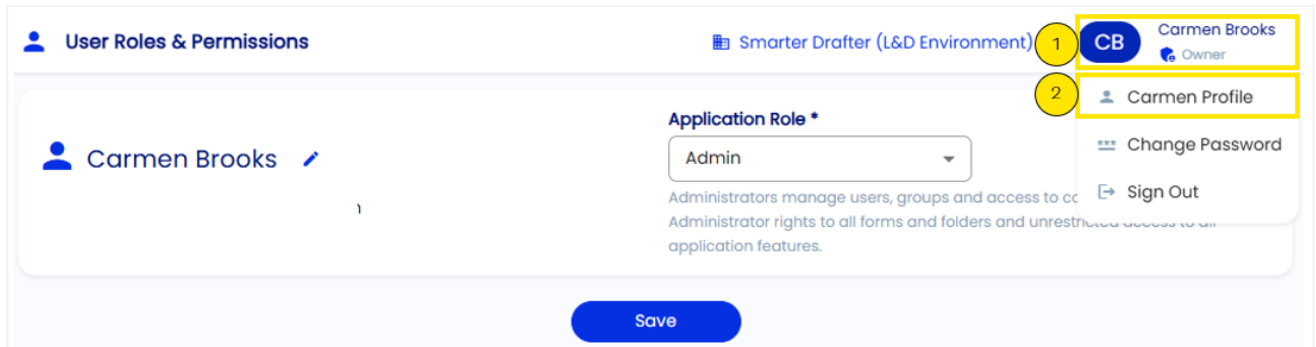
🔍 Search...

First Name(s)	Surname	Position	Direct Email	Role	Status
Jason	Smith		jsmith@friendlylawyers.com	Form Builder	Inactive
Linda	Di Girolamo			Admin	

1.4 Request a User to Update Their Profile

The user should be prompted to set up and maintain their own user profile. To do this, the user can:

1. Click their **own name** in the top right corner of the web application when logged in.
2. Click **[Name] Profile**.



This will open the pop-up editor for their profile, where their details and signature can be maintained. This information will be required to generate user data in documents.