

New Entity Onboarding Guide



Content

Content

- How to create a new entity (organization)
- How to set the subscription limits
- How to manage users and their roles



Add New Entity

- 1. Login using admin credentials
- 2. Go to Administration \rightarrow Organizations
- Click "Add new organization". Use this form to invite the main organization admin (as provided by the client).

NOTE: Once invited, the system will automatically create a new organization using the **user's name**.

🕀 circularo						۲	Anterioration +
Exit advisionation	Organizations				×		
Uners & Access Ministers Groups	Ad one operation		Email	Personal Details			Streaming 1 - 6 of 75 liters
ACLA Repro	ORGANIZATION NAME	Add picture Account status Invited	Name		PLAN STATE		•
Metadata Tampiatas Warthbows	Adam Kacidin Test	Created on behalf of Administrator	reated on behalf of				
C Public Flow	Charlie Adams			Cancel Save	Active		
)_ Global Fields	Circularo Demo				Active		
E Autoria	Company ABC	Unlimited		Unlimited	Active		
2. manuals	Daitotean	Unimited		5 from 10	Active		
	Google Verification	0 hum 100		Unimited	Active		

Tab "Group Information"

4. Click on the newly created organization to edit its details:

- **Organization name**: Set to the actual name of the client's organization (e.g., Organization Test)
- **Plan**: Choose based on the client's subscription

Circularo							۲	Annaly and a second
Exit administration	Organizations	Group			×			
Montes & Assess	Add new argumention	Information Organization name	Members(1)	ACLs	Plan			Showing 33 - 38 of 75 Items
Comps Organizations		Organization Test						
ACLa Region Di Sentinga	ORGANIZATION NAME	No translations Description			Add	PLAN STATE		
C Metadata Templates	Organization Subscritest					Active		
D Workforms D Public Films	Organization test	Organization Organization Test			•	Active		
E Line)_ Global Factor	Organization text	Plan			•	Active		
E Translation	Organization Test			Cane	tel Save	Active		
A Westweets	Organization Test	0 from 100		Unlimited		Active		1
	Organization Test	0 from 100		Universitied		Active		-



Tab "Plan"

- License name: Choose based on the client's subscription
- Subscription ID: Unique identifier
- State: Leave as Active.
- Effective from: The date the subscription begins typically the day the admin receives access to application.
- **Reset interval:** Usually set to **1 year**, unless otherwise specified.

e circularo				(i) 🖗 Annuar -
Est adversariation	Organizations		×	
Maria & Access Mandares Groups	Add new organization	Group Members(1) AC	Ls Plan	Shanning 33 - 38 of 75 famms
Organizations				
ACLA Region	Of GANCETON NAME	Plan trial_pro	PLANSTR	
Santings Metaolatic Templetes	Organization Subscritest	State Active	Active	
D Workfrows	Organization test	Effective from	C Adve	
E Links	Organization test	Reset interval 0	Hours 👻	
Ci Transistion	Organization Test	User limit	Unimited	
A manual	Organization Test	Lite user limit	Unlimited	1
	Organization Test	Transaction limit 100	Unlimited	
		Transaction limit per user	Unlimited 💽	
		Sealing limit	Unlimited	



Set Limits

- User limit: based on subscription
- Lite user limit: based on subscription
- Transaction limit: based on subscription
- Transaction limit per user: based on subscription
- Sealing limit: based on subscription
- Sealing limit per user: based on subscription
- Storage capacity limit: based on subscription
- Storage capacity limit per user: based on subscription

		User limit	Unlimited 🧲
	Grassisstian	Lite user limit	Unlimited
	orgunizations	Transaction limit	Unlimited 📿
Chars & Access	All are separated as	100	
Merchant		Transaction limit per user	Unlimited 🧲
Crosps Organizations			
ACLa		Sealing limit	Unlimited 🤇
Repto	ORGANIZATION NAME	100	
Settings		Sealing limit per user	Unlimited 🧲
) Methodatic Templetes	Organization Subscritest		
Wathhows		Templates limits	Unlimited
Public Films	Organization test		
		Templates limit per user	Unlimited 🧧
	Organization test		
Challed Failth		Storage capacity limit (bytes)	Unlimited 🧲
3 Translation	Organization Test		
Auth logs		Storage capacity limit per user (bytes)	Unlimited 🧲
S Webbanks	Organization Test		
		Created on	
	Organization Test	Last reset 02-Apr-203	15
		Renewol date 02-Apr-203	16
		Ignore limits Yes	





Invite New Users

- 1. Login using admin credentials
- 2. Go to Administration \rightarrow Users
- 3. Click "Add user". Use this form to invite users to the system.
- 4. Fill in user details (Email, Name, etc.)
- 5. Under "**Organization**" select the organization to which you want to invite the user
- 6. Select user role (Member, Lite member, Admin...)
- 7. Click "Save"

circularo					(i) (i) Annual Annua
Est advisuturios	Members	User Information	Personal Details Group memberships	×	MEMBERS TOTAL ACTIVE RAPPENDE 옷 1995 ④ 1111 ④ 2
25 Users & Access Mandans	Add user Filter by status + Organizations		Email	Showing 1 - 6 of 195 items	Active Directory Configuration
Organizations ACLs	Q. Search for users	Add picture	Name		
8444 0 5-100	NAME 1	Account status	_	0445. •	•
Matadata Templetes	20053172	Created on behalf of		gm/53172@ileti.com	
D Public Films	ChoLacos	Organization		zevens@rios.com	
E Links	Guidek sigen text		• Member •	yejate8407@alentex.com	
E function	O x8x10348		Cancel Save	xde10348@nezid.com	
2. Waterste	Mary Long	Instead		wigginsdennis@muryty.bi	
	O Mile Power	Active		webek.39885.@ptiong.com	
					0

Manage Users' Roles

- 1. Login using admin credentials
- 2. Go to Administration \rightarrow Users
- 3. Search for the user who's role you wish to change
- 4. Click on the user's name to edit their details
- 5. Under "Organization" select the new user role

6	circularo				Member Members have full access to functionalities in the app but	all the features and t cannot manage			٥	Annese States
	full administration	Members		Dama	Member Lite (Prepare C Lite users have limited acces	Only) ss to the app and its	×		.음. 194	10% ACTM SUPPOSED (*) 110 (*) 2
*	Users & Access	Add year Piller by state	Information	Deta	documents and initiate signi organization members.	ing processes for other		ted members *	Active Dir	ectory Configuration
1	Members	_		Emai	Member Lite (Read Only	y)				
	Groups Organizations	Q. Seconds for users	Q	yej	features. Read Only Membe documents they've been gro	rs can only browse inted access to.				
	ACLA		Add picture	Nam	Member Lite (Sign Only)				
	Repris	NAME I		Qu	Lite users have limited acces features. Sign Only Member	is to the app and its s can sign, approve,		EMAL .		
	Settings		Account status		accept, and review docume	its they ve been sent.				
0	Metadota Tamplates	20053172	Active		Admin Admins get the right to man	age teams, and members		zmi531720	plebi.com	
	Workflows		Organization		within the organization and wide default settings.					
	Public Files	Lise Locas	Short		•	Member 👻		zevenspris	6.com	
	Lints		Password							
	Chebral Fields	Quick sign test				SHOV		yejale8467	galertes.co	
	Translation					Cancel				
	Audit logs	Circulars powered by Karel 6 202								O



www.circularo.com