

New Entity Onboarding Guide

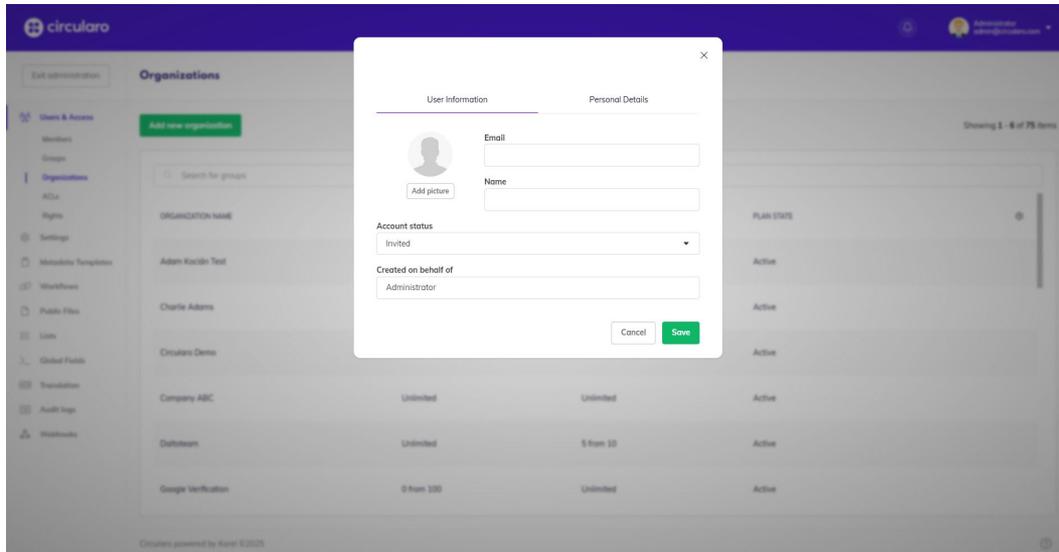
Content

- 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 → Organizations
3. 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**.



The screenshot shows the 'Organizations' management page in the Circularo admin interface. A modal window is open for adding a new organization. The modal has two tabs: 'User Information' (selected) and 'Personal Details'. The 'User Information' tab contains the following fields:

- Email:** A text input field.
- Name:** A text input field.
- Account status:** A dropdown menu with 'Invited' selected.
- Created on behalf of:** A text input field with 'Administrator' entered.

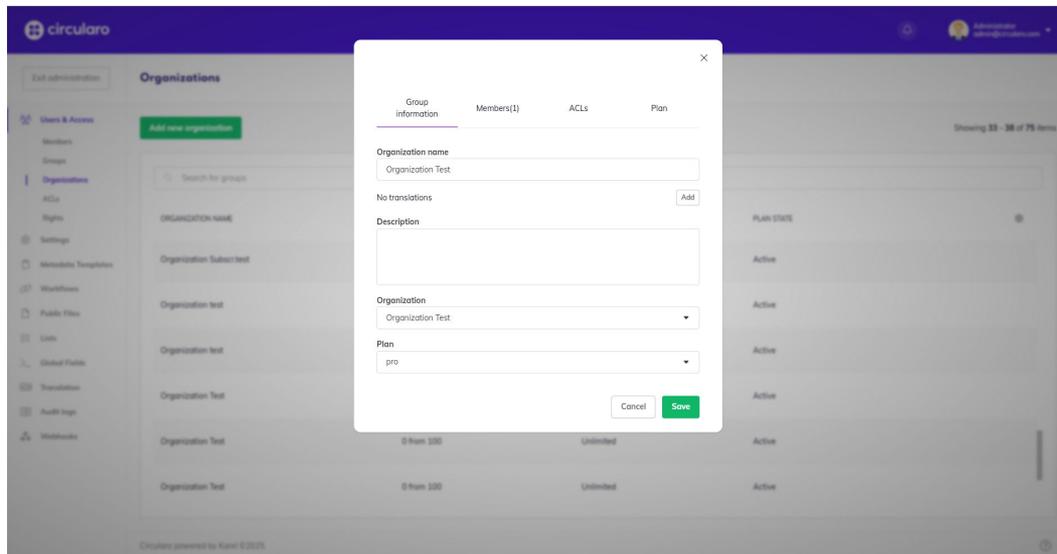
At the bottom of the modal are 'Cancel' and 'Save' buttons. The background shows a table of existing organizations with columns for 'ORGANIZATION NAME', 'PLAN STATE', and 'Active'.

ORGANIZATION NAME	PLAN STATE	Active	
Admin Kacim Test		Active	
Charlie Adams		Active	
Circularo Demo		Active	
Company ABC	Unlimited	Unlimited	Active
Dukeham	Unlimited	\$ from 10	Active
Google Verification	\$ from 100	Unlimited	Active

Tab “Group Information”

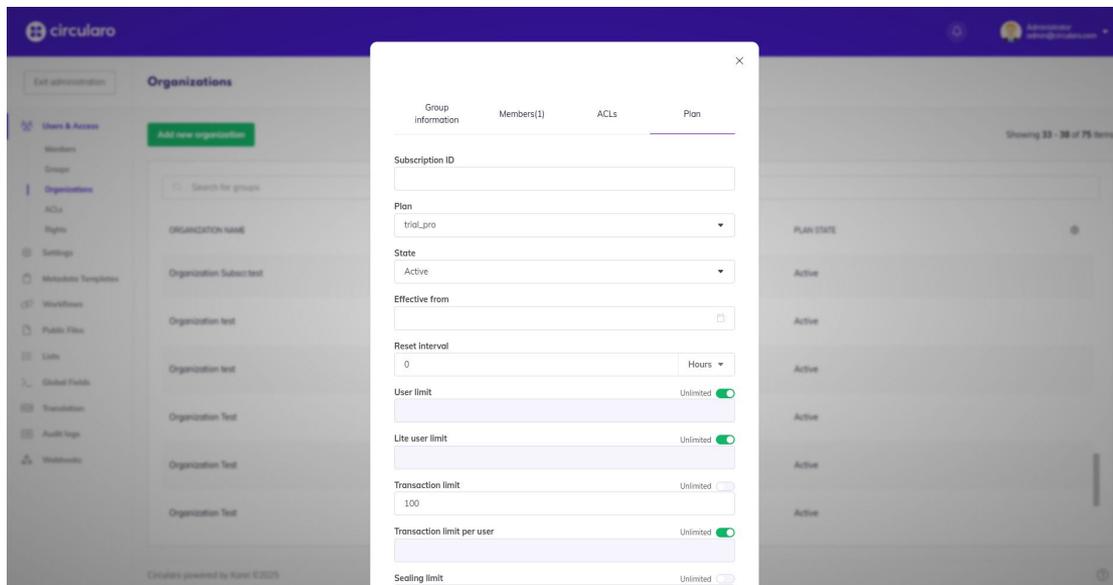
4. Click on the newly created organization to edit its details:

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



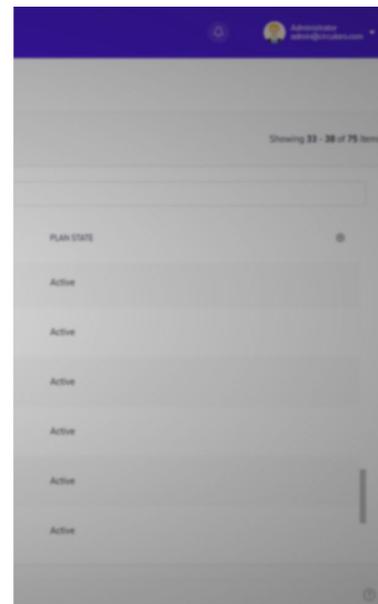
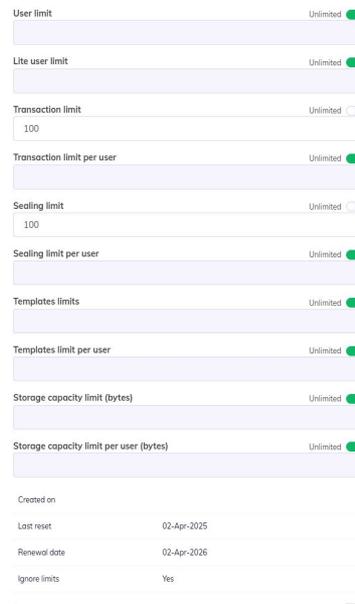
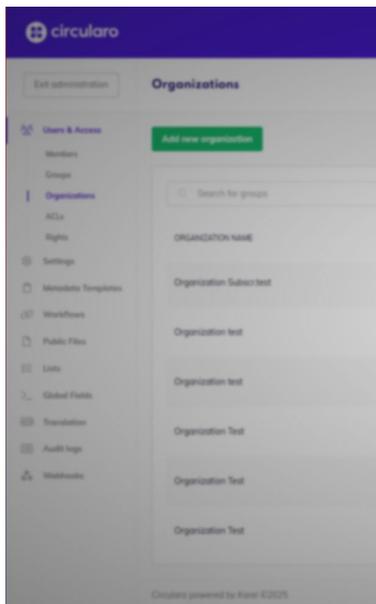
Tab “Plan”

- **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.



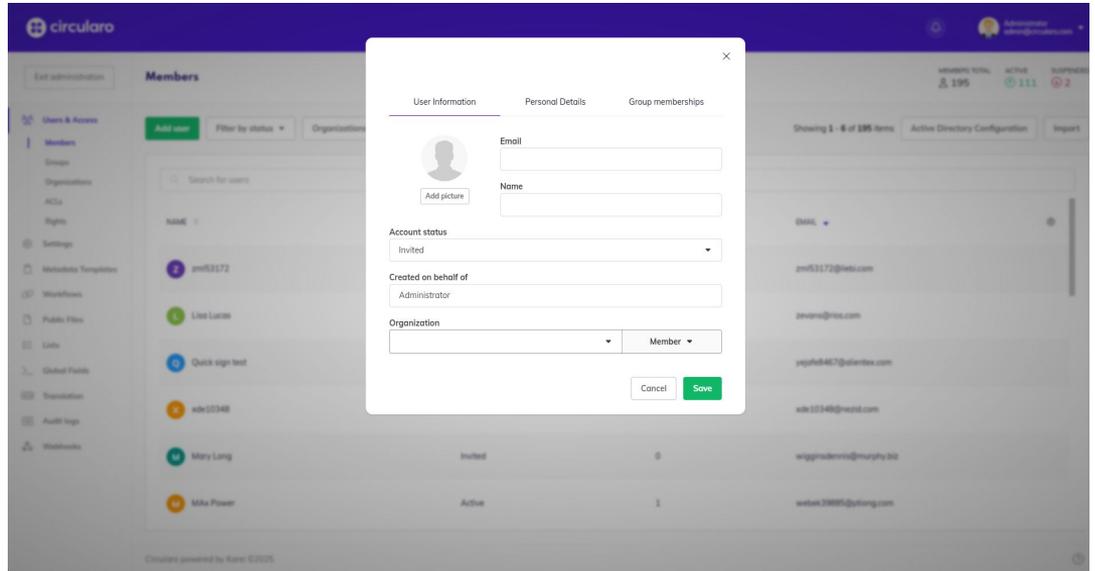
Set Limits

- **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



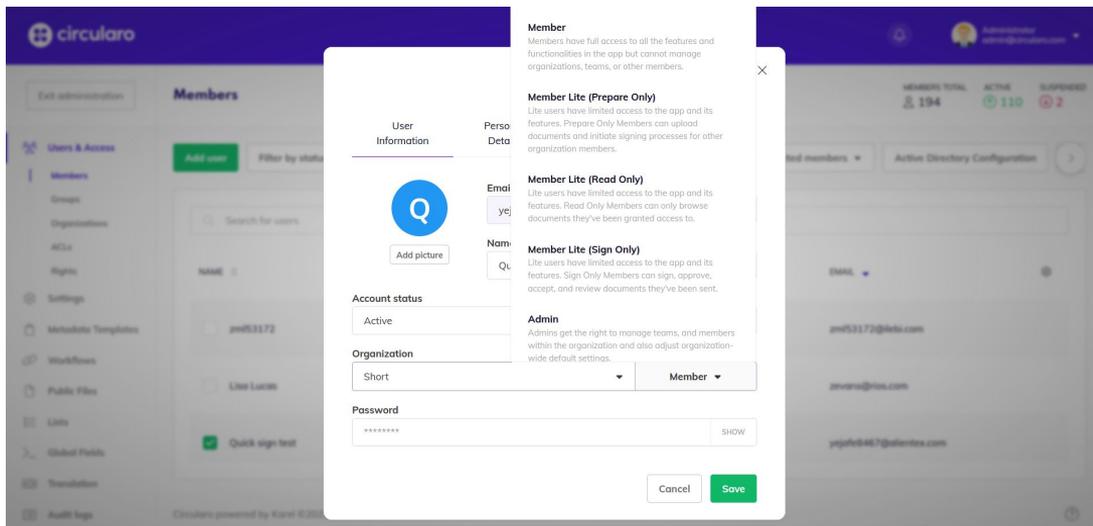
Invite New Users

1. Login using admin credentials
2. Go to Administration → 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”



Manage Users' Roles

1. Login using admin credentials
2. Go to Administration → 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





www.circularo.com