



Instructions – Managing MyUsers

Important: Hold the “Ctrl” key on your keyboard while clicking the “F” key to search this document.

MyUser functionality allows an organization to keep all its sourcing data in one account. This ensures historical value for reference and analytics for negotiating with hotels and hotel companies. With SourceYourMeeting.com we understand that our clients want to be able to give different types of users different levels of access to a project or multiple projects. Use this document to help you manage these users.

Content

- Administrator Functionality..... 1
 - A. Administrator User:.....1
 - B. Users - Once created by the Administrator these users can:2
 - C. Guest Users - Once created by the Administrator these users can:2
- Managing MyUsers2
 - A. Creating a User or Guest Users2
 - B. Editing A user ⁴3
 - C. Linking (assigning)/un-linking a project.....3
 - D. Deactivating/Reactivating a User ⁵3

Administrator Functionality

When you first login as an Administrator you can either create your first project or add users to your account so they can begin sourcing their own RFP’s.

A. Administrator User:

- a) See Account Subscription Status
- b) See Payment Button at times of Subscription Renewal
- c) See how many project they and their team have created
- d) See how many users they have in their account.
- e) Can edit their Organizations contact information
- f) Can edit their own contact information
- g) Create their own projects
- h) Create a project for someone else (someone else to manage or share)
- i) Create, edit and activate or deactivate users and guest users in their account
- j) Run reports for their own projects or ones their users or guest users created
- k) Share projects they’ve created or that others have created with their users or guest users (Link)
- l) Link projects created by one user to another user so they can share information (see the other persons projects and associated actions and reports)
- m) “Archive” a Project or make it active again (Archiving allows you to move the project from your active projects page for easy navigation. You can still view all report data and other information when the project is Archived)



- n) Create or edit a Guest User (A Guest User is not able to create new projects but can view reports, but not hotel contact information, related to projects that you share with them (Linked to them).

B. Users - Once created by the Administrator these users can:

- a) Create their own projects (Your Administrator can view your projects and can Link other users to your projects or Link projects created by other users to you.)
- b) View reports for their own projects or projects their Administrator links to them.
- c) Archive their own projects (or activate a project they archived)
- d) Share projects they've created other users or guest users in their account (Link)

C. Guest Users - Once created by the Administrator these users can:

- e) View projects which were Linked to them by the Administrator
- f) View Quick Report for the projects that their Administrator or Other Users in their organization Link to them.
- g) Archive projects (or activate a project that their Administrator Links to them)

Managing MyUsers

Below is a screen shot of the MyUsers page. To access this page you click the MyUsers option in the navigation bar at the top of the page. **1**

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1

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Name	Email	Company	Phone	Status	Edit	Make Admin
Peter Hanley (PlanNet)	pete.hanley@yourmeeting.com	PlanNet (YourMeeting.com)	703-778-9000 x101			User 4
Jane Doe (DemoUser)	petehanley@outlook.com	ClientCompany1 (TESTUser)	703-778-9000			User
Bill Cody (DemoUser1)	user1@yourmeeting.com	ClientCompany1 (TESTUser1)	703-778-9000			User
Rosemary LastName (DemoGuest2)	guestuser2@yourmeeting.com	ClientCompanyContractor (TEST)	703-778-9000			Guest User
Jack LastName (DemoGuest3)	guestuser3@yourmeeting.com	ClientCompanyContractor (TEST)	703-778-9000 x101			Guest User 3
John LastName (DemoGuest1)	guestuser1@yourmeeting.com	ClientCompanyContractor (TEST)	703-778-9000			Guest User

A. Creating a User or Guest Users

Note: You may create as many users or guest users as your subscription includes. If you need more users please contact Support@SourceYourMeeting.com to upgrade your account at any time)

1. To create a **User** (Staff, co-worker, or third party/Consultant), simply click on the +New **2** button, complete the required fields and select the Group (User or Guest User at the bottom)
2. To create a **Guest User**, click the +New **2** button. To see which users are guests see **3**,



3. When creating a user assign a generic but secure password and have the user go to www.SourceYourMeeting.com/App and click the Forgot Password button so they can resent their own secure password (Email Support@SourceYourMeeting.com if you have questions)

B. Editing A user 4

Click the  icon on you're my Users page

C. Linking (assigning)/un-linking a project

See Linking and Unlinking projects in the "Managing Projects Instructions" documentation.

D. Deactivating/Reactivating a User 5

If a person no longer should have access to the SourceYourMeeting.com account you can deactivate them. Simply navigate to the MyUsers page then uncheck the box in the Status

column . A Checked box indicates the User is active and can log in. This is a toggle so if you wish to reactivate them you just click the box again and it will reactivate that user. The Admin from your account can still see all projects for a deactivated User.