In this video, I'm going to show you how you can add team members to VBOT and assign different level of permissions to their account.

From the top right of the screen, you're going to go to your drop down users.

And here you're going to see two options, which are users and workflow and groups.

Now admin team is reserved only to multi tier environments, particularly if you have an agency with sub accounts.

If you're franchise and you're running multiple sub accounts as their own licenses.

So admin team has a different structure and I cover that in a completely separate multi tier module.

In your case, you're going to see users and workflows and you're going to have an option here called add user.

You can click on that, choose the user's photo.

If you don't see it here, you can just upload it directly.

Let me just pull something from my end.

I highly recommend getting your team member pictures uploaded because this helps in terms of how things will show on pipeline managers in other places.

All right, now you give obviously the full name.

Their email user name, it has to be an email because they're going to get an invite.

So I'm just going to do rich.

And by the way, Gmail support this sort of process.

If you do rich plus one plus two, you have an alias to your inbox.

It's a cool trick to kind of do multi email testing.

And you can see here, I don't have any groups.

Groups is almost like a folder of pre-assigned permissions.

So instead of having to create a user and every time I sign a permission to them, you create a group and then you simply add each user to the group.

This is popular when you have different departments and different users with different access levels.

If you're a very small team of one or two people, this might not be necessary.

Now full access is going to be providing them access to the entire platform.

That includes adding users, visiting your billing, settings and all that stuff.

So if you're sensitive about that, I would certainly use custom permissions.

Here you're going to notice there is a drop down with all the features.

So if you want to reserve access for that user to one or two features, you can click on that feature here.

There are some add-ons, so if you've installed some of our add-ons, this might be an additional option that shows up.

There are some specific permissions, for example, if you don't want them to access settings or billing, what you do in this case, you can select all and then start deselecting whatever you don't want them to see.

Right? Very easy.

It gets really granular, including if you'd like to give them very limited access to contacts or limited access to social media groups.

This is like a folder of social media profiles they could manage.

Or even custom email lists.

So you have, let's say, salesperson A is managing five email lists and salesperson B is managing multiple lists.

This is a granular way of adding it.

You'll notice right here below, if I uncheck or I check this, some additional options are going to show.

For example, now the custom list has disappeared and now it appeared again.

I would need to complete this.

This is telling me what kind of lists or what are the names of the lists you'd like them to access.

Currently I have four lists, so let's say I just want this account to see Expo 2020 and welcome offer.

Or of course, I can assign them to all the lists if I want.

And if I have created my social groups, which I haven't so far, and assuming maybe I have one Facebook and one Twitter, and I want this user to only be able to access and manage these two profiles, it's going to show up in here as a group and you can put them in there.

I'll cover this in depth more in my social media module.

And that's it.

The user is going to get an email.

They will have to complete the process, set up their password.

And for some reason, they didn't get the email, they deleted it.

You can always come back, edit, and set their password directly here.

Of course, we do have a prompt on VBOT so they can reset it themselves, but this is really an easy way to do it.

I'm going to go ahead and just assume this is going to be a full access account and go ahead and submit.

And it's done.

Now going back to groups, I'll show you how easy it is.

I can say this is marketing, custom permissions, and you can go in here, same exact drop down is going to show up on here.

And you can choose as a preset permission list what they can access directly here.

And that's pretty much it.

I'm going to select all, perhaps just deselect a couple of things from the bottom, and submit.

Oops.

Okay, the custom list has to be unchecked.

And these are some of the things you might notice.

If you get any errors or anything, this may be like a misconfiguration somewhere along the way.

Now the next time I try to add a group or sorry, I go to my workflows, add user, and if I do custom permissions or marketing, I'm sorry, it's going to show up, and now it's inheriting that group permission.

It's as easy as that.

Now in terms of administrators, if you have agency users or corporate with multiple sublocations, you might see one additional option here, which are what subaccounts can they access.

I have nothing here at this moment, but if I have multiple licenses under me, this will get really granular in term of how many subaccounts I can also manage.

So this is how you can create team members inside VBOT.