Guide

ADP Marketplace Partner Portal - Adding Additional Users

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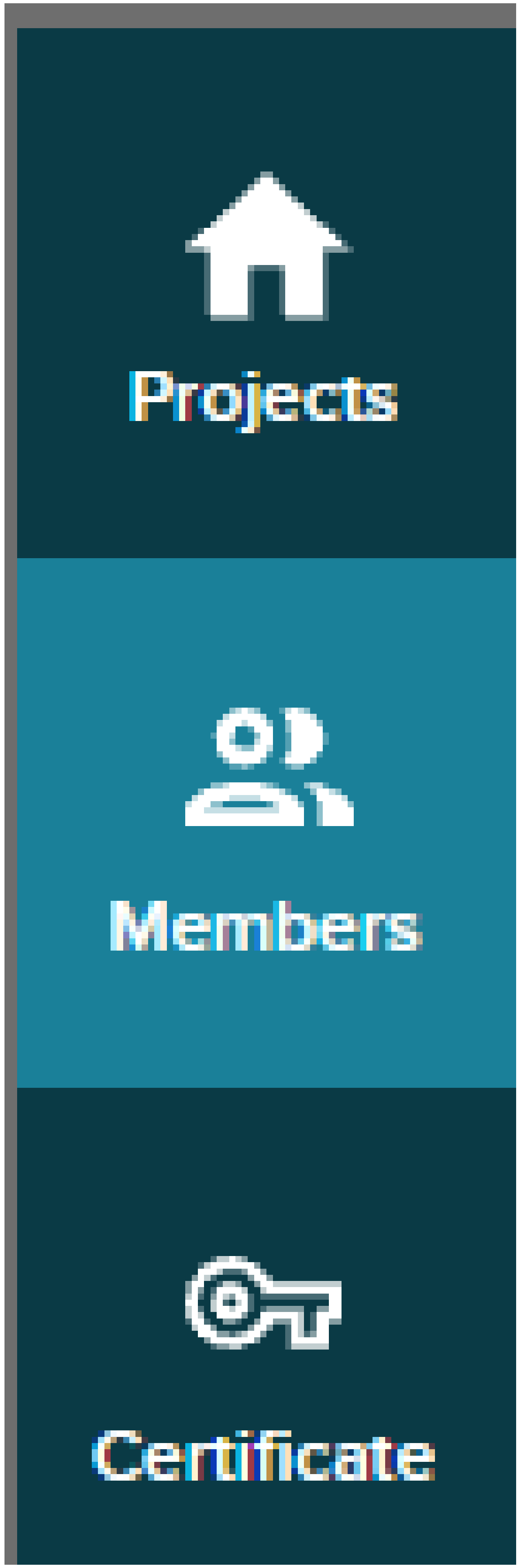
Chapter 1

Adding Additional Users

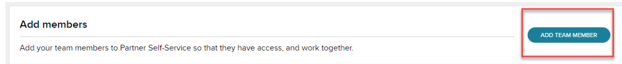
Creating a Netsecure ID

Netsecure IDs are used to access the Partner Portal.

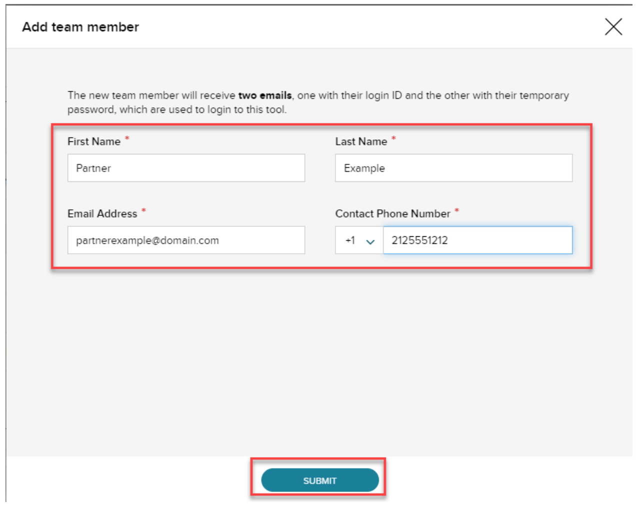
1. Log into the Developer Self Service Portal with your partner account (Netsecure ID)
2. Click on the **"Members"** icon in the left hand column to create a Netsecure ID for each person who will require access.


Projects
Members
Certificate

3. Then click on **"Add Team Member"**



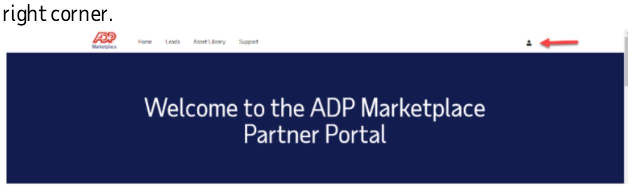
4. Fill out all of the required fields then click on **"Submit"**



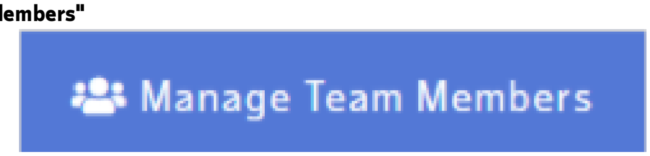
5. The new user will now appear under the "Active Members" list and will also receive two emails (one with their user ID and one with a temporary password and instructions to setup a new password).

Creating a New User in the Partner Portal

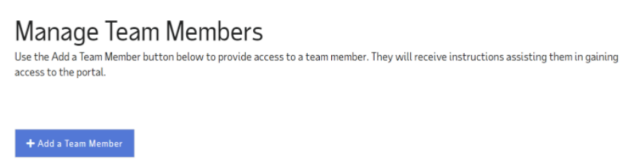
1. Go to the **Partner Portal** and login with your NetSecure ID (ex: PExample@Partnerx2)
2. Go to the **"Person Icon"** in the top right corner.



3. Click on the **"Company Profile"**
4. Scroll down to **"Manage Team Members"**



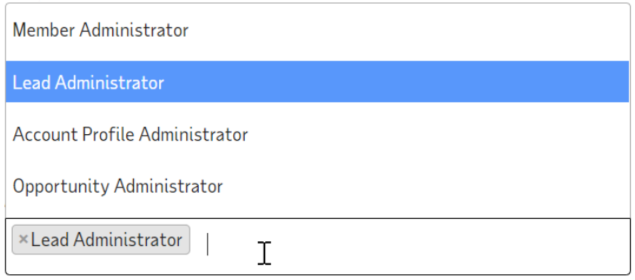
5. Click on **"+ Add a Team Member"**



6. Enter in the Team Member's **Email Address** into both the **"Username"** and the **"Email fields"** (**it must match the email address used when the NetSecure ID was created**).

Setting User Access

1. Go to **"Manage Team Members"** to set administractive privileges.
2. To allow them to view leads check the **"Lead Administrator"** box
3. To allow them to create other users check the **"Member Adminstrator"** box



4. Then click on **"Submit"**

Info

Multiple users can have these privileges.

Lead Alert User

1. Only one user (Primary User) can receive email alerts when new leads are created .
2. We suggest creating a user **"Lead Manager"** with a group email alias so alerts go to multiple people.
3. Please reach out to your Partner Development Manager and let them know which user you want to set as the Primary User for alerts.

Tip

If you don't know who has Member Administrator rights at your company to set up additional users (or need other help), please reach out to your Partner Development Manager and we will assist you with getting set up.

Delegated Administration Privileges

Member Administrator

Manage the users within your organization. Member Administrators can:

- Add a new user.
- View all users within the organization and their status.
- Update contact details of any user within the account.
  *De-activate or re-activate users.
  *Designate other delegated admins.

*Modify any profile information of that user

Lead Administrator

- View and update leads.
- Optional: If you plan on assiging leads to specific team members through the Partner Portal and you don't want them to see leads they are not assigned, don't give them Lead Admin privileges. Instead, to assign a lead to a specific member of your team, please open the lead opportunity, scroll to the bottom and select **"Reassign"** next to **"Partner Member"**. Then select the appropriate teammate in the **"Partner Memeber"** dropdown and click reassign.

Account Profile Administrator
Manage the Partner Account profile details within your organization.

- Update company profile fields that appear on the Account Profile page.

Opportunity Administrator – Ignore (this field is not used)