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Portal > Knowledgebase > ESP Admin > Manage Users

Manage Users

Wendy D - 2019-06-07 - in ESP Admin

Within the Users section of the ESP Admin, administrators are able to manage their company's ESP users within ESP CRM and Orders.

Click on the Avatar (user icon) in the upper right corner and then select Settings. Then, click on Users from the options on the left.

To locate an existing user, begin entering the user's first or last name in the Search Existing User box. As you type, matching results will display below the search box.

A screenshot of the 'Users' management interface. At the top left, there is a user icon and the text 'Users'. Below this, there is a search bar with the placeholder text 'Enter or Choose a User' and a green 'Add User' button to its right. Below the search bar, there is a 'Search Existing User' input field with a magnifying glass icon on the right. A blue arrow points from the 'Search Existing User' text to the input field.

Each user listing has several options for permissions:

- Administrator: Provides administrative control of ESP Orders and CRM to the user.
- Create Invoice: Enables the user to create invoices.
- Create PO: Enables the user to create purchase orders.
- Data Exporter: Enables the user to export data from ESP Orders and CRM.
- Email Marketing: Enables the user to send email marketing campaigns.
- Orders: Enables the user to send order documentation.

Number of Users: 63

	Jane Doe	<input checked="" type="checkbox"/> Administrator	Remove
		<input checked="" type="checkbox"/> Create Invoice	
		<input checked="" type="checkbox"/> Create PO	
		<input checked="" type="checkbox"/> Data Exporter	
		<input checked="" type="checkbox"/> Email Marketing	
		<input checked="" type="checkbox"/> Orders	
<hr/>			
	John Doe	<input type="checkbox"/> Administrator	Remove
		<input type="checkbox"/> Create Invoice	
		<input type="checkbox"/> Create PO	
		<input type="checkbox"/> Data Exporter	
		<input checked="" type="checkbox"/> Email Marketing	
		<input checked="" type="checkbox"/> Orders	

Note: If a user has been marked as an administrator, they will automatically be designated as able to create invoices, purchase orders, and export data.