

User Management

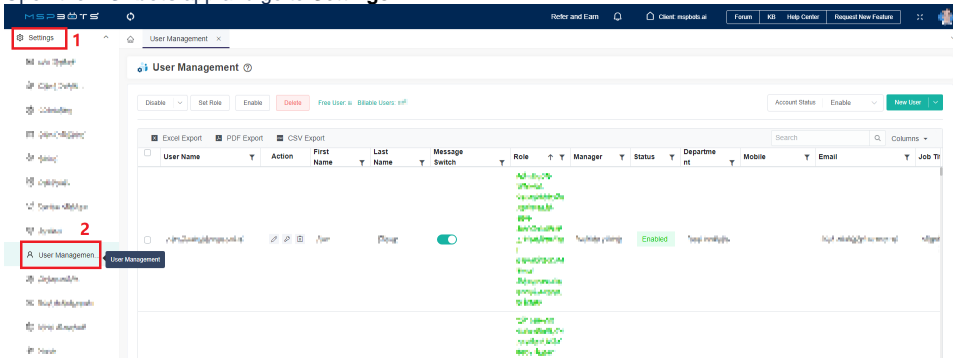
The User Management section in the MSPbots app is where you can perform actions like adding new users, configuring user settings, and exporting user information, to name a few.

What's in this article

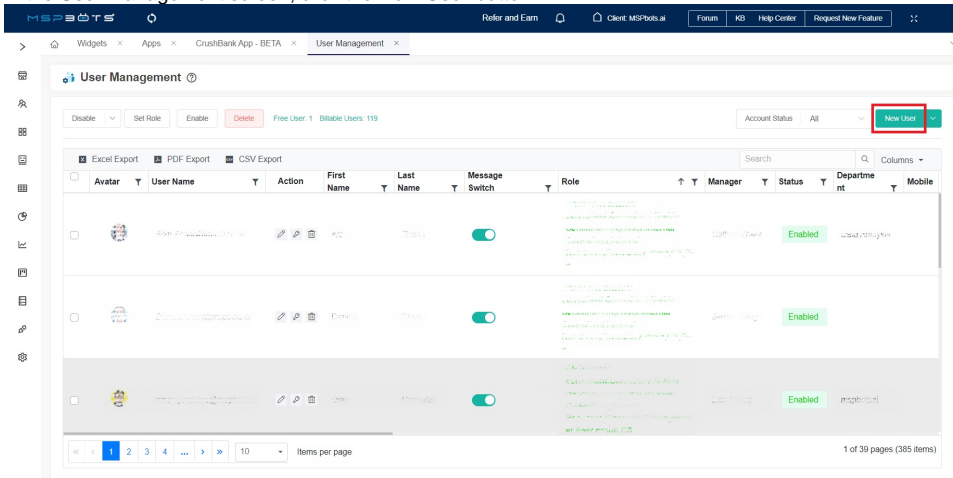
1. How to add a new user
2. How to modify individual user settings
 - 2.1. Edit user configuration
 - 2.2. Delete individual users
 - 2.3. Reset the password for the user
 - 2.4. Stop receiving MSPbots messages
 - 2.5. Manually Sync MS Teams users or automatically map users
3. How to configure multiple users
 - 3.1. Disable users
 - 3.2. Set a role for users
 - 3.3. Enable users
4. How to export user information

1. How to add a new user

1. Open the **MSPbots** app and go to **Settings**.



2. Select **User Management** under Settings.
3. In the User Management screen, click the **New User** button.



4. When the Add window opens, enter the following information for the new user

Add

User Name

User Name

Email

Email

First Name

First Name

Last Name

Last Name

Display Name

Display Name

Password

Mobile

Mobile

Business Phones

Business Phones

JOB INFORMATION

Manager

Manager

Department

Selection Department

ACCOUNT INFORMATION

Role Config

Role Config

Status

After a user's account is suspended, that user will not be able to log in.

Message

After closing the message, the user's teams will no longer receive messages from MSPbots.ai.

Home Channel

Home Channel

Home Page

Home Page

THIRD-PARTY PLATFORM MAPPING

CW User Mapping

CW User Mapping

Teams User Mapping

Teams User Mapping

TSheets User Mapping

TSheets User Mapping

Time Doctor User Mapping

Time Doctor User Mapping

Kaseya BMS User Mapping

Kaseya BMS User Mapping

Jira User Mapping

Jira User Mapping

Halo User Mapping

Halo User Mapping

Cancel

Confirm

- **User Name**
- **Email**
- **First Name**
- **Last Name**
- **Display Name**
- **Password** - The initial password cannot be modified. If you need to change the user's password, add the new user first then reset the password using the instructions for [resetting the password](#).
- **Mobile**
- **Business Phones**
- **JOB INFORMATION**
 - **Manager** - For information on setting up the Manager role, refer to the article [How to Set Up Manager and Job Title Info for Employees](#).
 - **Department**
- **ACCOUNT INFORMATION**
 - **Role Config** - Select the role that will be assigned to the user by selecting an option from the dropdown list.
 - **Status** - Disabling the **Status** switch will suspend the user's account. The user cannot log in to the MSPbots app anymore.
 - **Message** - Disabling the **Message** switch will stop the messages sent to MS Teams. The user will no longer receive messages from MSPbots.
 - **Home Channel**
 - **Home Page**
- **THIRD-PARTY PLATFORM MAPPING**
 - **CW User Mapping**
 - **Teams User Mapping**
 - **TSheets User Mapping**
 - **Time Doctor User Mapping**
 - **Kaseya BMS User Mapping**
 - **Jira User Mapping**
 - **Halo User Mapping**

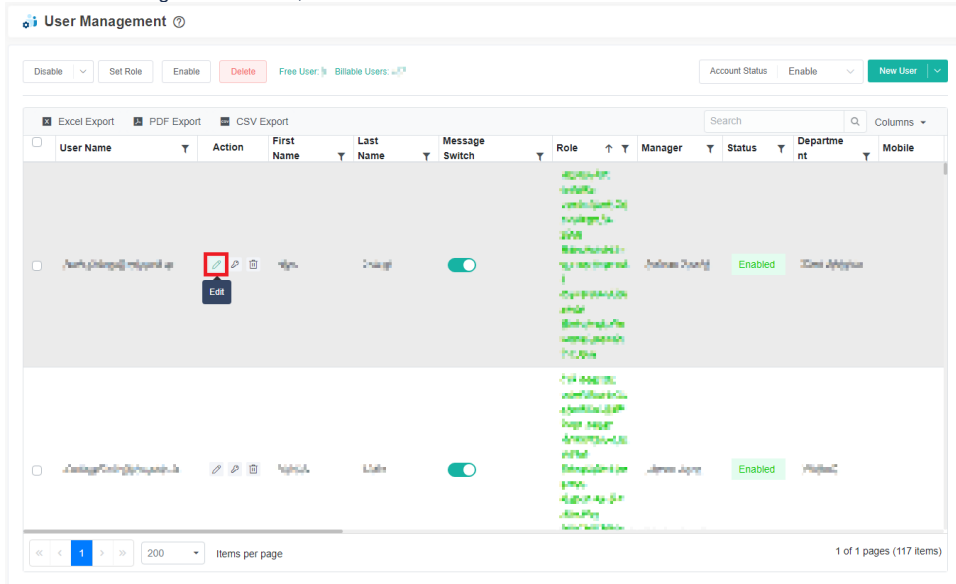
5. Click **Confirm** when done.

2. How to modify individual user settings

2. How to modify individual user settings

- **2.1. Edit user configuration**

1. In the User Management window, click the **Edit** icon in the row where the user is located.



2. Update or modify the user's information in the Edit window and click **Confirm**.

Add ×

User Name

First Name

Display Name

Mobile

Job Information
Manager

Account Information
Role Config

Status
After a user's account is suspended, that user will not be able to log in. ☒

Home Channel

Third-Party Platform Mapping
CW User Mapping

TSheets User Mapping

Kaseya BMS User Mapping

Halo User Mapping

Email

Last Name

Password

Business Phones

Department

Message
After closing the message, the user's teams will no longer receive messages from MSPbots.ai. ☒

Home Page

Teams User Mapping

Time Doctor User Mapping

Jira User Mapping

• 2.2. Delete individual users

1. Click the **Delete** icon in the row where the user is located.

User Management ⊙

Disable Set Role Enable Delete Free User Billable Users

Account Status Enable New User

Excel Export PDF Export CSV Export

Search Columns

<input type="checkbox"/>	User Name	Action	First Name	Last Name	Message Switch	Role	Manager	Status	Department	Mobile
<input type="checkbox"/>	John Doe	<input type="button" value="v"/> <input type="button" value="v"/> <input checked="" type="button" value="v"/> <input type="button" value="v"/>	John	Doe	<input checked="" type="checkbox"/>	Admin	John Doe	Enabled	IT	1234567890
<input type="checkbox"/>	Jane Smith	<input type="button" value="v"/> <input type="button" value="v"/> <input type="button" value="v"/> <input type="button" value="v"/>	Jane	Smith	<input checked="" type="checkbox"/>	Admin	Jane Smith	Enabled	IT	0987654321

< 1 >

200 Items per page

1 of 1 pages (117 items)

2. Click **Confirm**.

Delete

×

Deleted users will not be able to use MSPbots, please confirm whether to delete?

CancelConfirm

- **2.3. Reset the password for the user**

1. Click the **Reset Password** icon in the row where the user is located.

User Management ⓘ

Disable

Set Role

Enable

Delete

Free User: 0

Billable Users: 0

Account Status

Enable

New User

Excel Export

PDF Export

CSV Export

Search

Columns

<input type="checkbox"/>	User Name	Action	First Name	Last Name	Message Switch	Role	Manager	Status	Department	Mobile
<input type="checkbox"/>	Johny [redacted]	<div><div><div>Reset Password</div></div></div>	Johny	[redacted]	<input checked="" type="checkbox"/>	[redacted]	[redacted]	Enabled	[redacted]	[redacted]
<input type="checkbox"/>	Chen [redacted]	<div><div><div></div></div></div>	Chen	[redacted]	<input checked="" type="checkbox"/>	[redacted]	[redacted]	Enabled	[redacted]	[redacted]

<<

<

1

>

>>

200

Items per page

1 of 1 pages (117 items)

2. Enter the **New password** and type it again in the **Confirm password** field.

Create New Password

×

New password

Confirm password

Cancel


Confirm

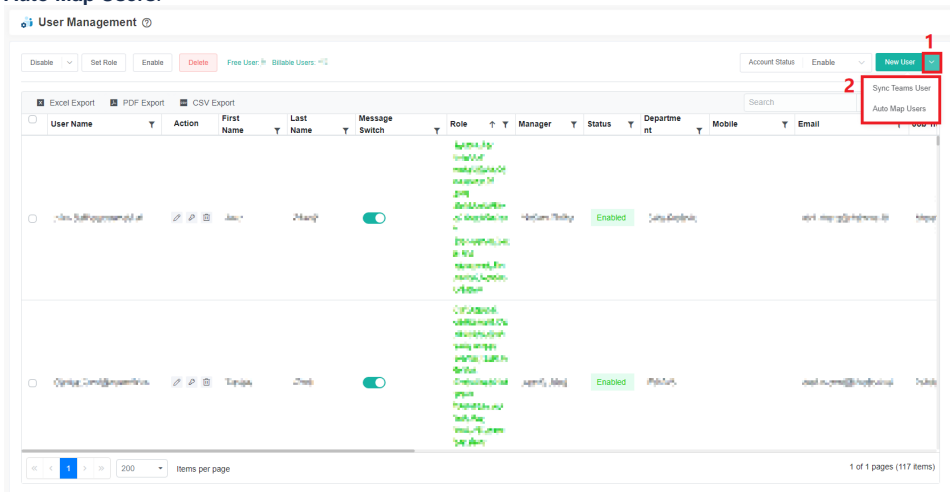
3. Click **Confirm**.

- **2.4. Stop receiving MSPbots messages**

Configure MSPbots to stop sending messages to the user by disabling the **Message Switch**. The user will no longer receive messages from MSPbots once this switch is turned OFF.

- **2.5. Manually Sync MS Teams users or automatically map users**

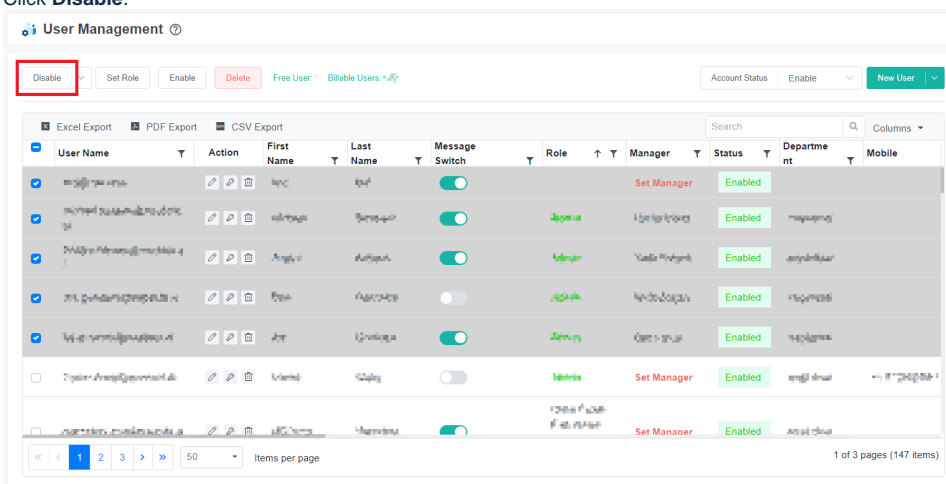
To manually sync MS Teams users or automatically map users, hover over  beside the the **New User** button and select **Sync Teams User** or **Auto Map Users**.



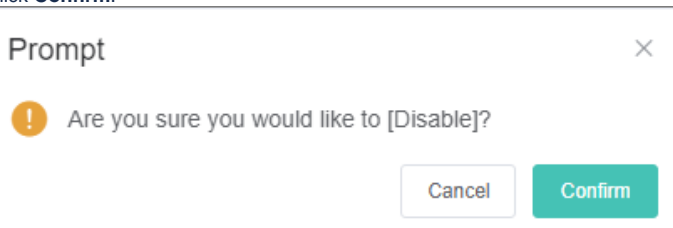
3. How to configure multiple users

• 3.1. Disable users

1. In the User Management window, select the users.
2. Click **Disable**.



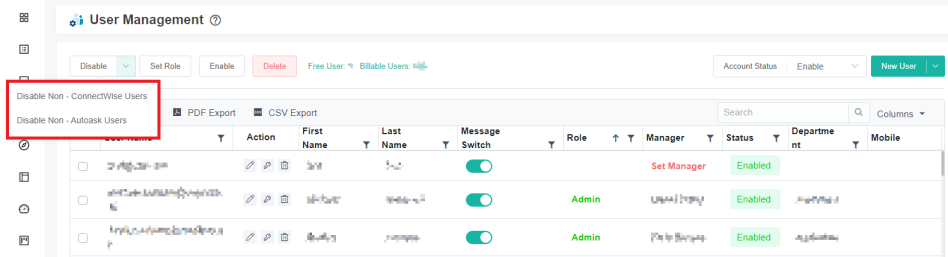
3. Click **Confirm**.



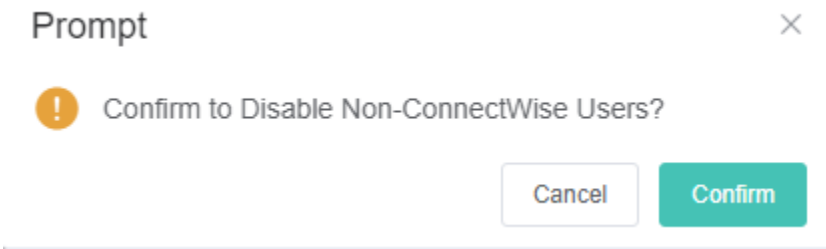
• Disable Non-ConnectWise Users/Disable Non-Autotask Users

1. Select the users who do not have ConnectWise or Autotask accounts.

2. Click  beside the **Disable** button.

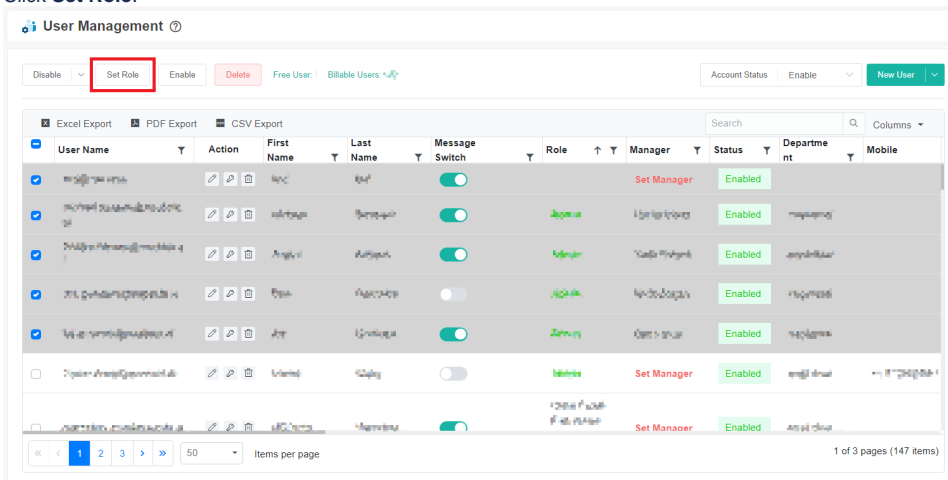


3. Select **Disable Non-ConnectWise Users** or **Disable Non-Autotask Users**.
4. Click **Confirm**.

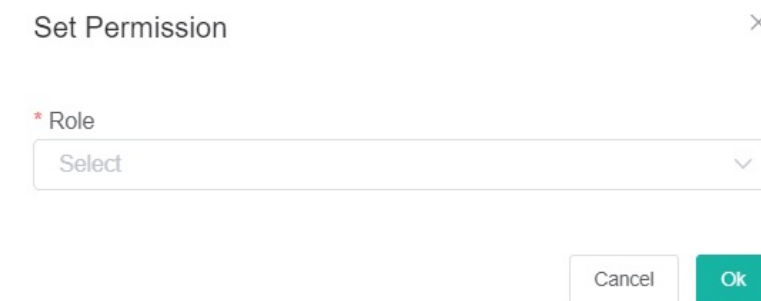


• 3.2. Set a role for users

1. Select the users.
2. Click **Set Role**.



3. Click the **Role** dropdown field and select one or more roles from the menu.



If you have previously configured roles for certain users, modifying their roles using this feature will overwrite their current roles.

4. Click **OK**.

• 3.3. Enable users

1. Select the users.

2. Click **Enable**.

The screenshot shows the 'User Management' window. At the top, there is a toolbar with buttons: 'Disable', 'Set Role', 'Enable' (highlighted with a red box), 'Delete', 'Free User', and 'Bilable Users'. Below the toolbar is a table with columns: 'User Name', 'Action', 'First Name', 'Last Name', 'Message Switch', 'Role', 'Manager', 'Status', 'Department', and 'Mobile'. The table contains several rows of user data. The 'Status' column shows 'Enabled' for most users. At the bottom, there is a pagination bar showing '1 of 3 pages (147 items)'.

3. Click **Confirm**.

The screenshot shows a modal dialog box titled 'Prompt'. It contains an orange exclamation mark icon and the text 'Are you sure you would like to [Enable]?'. At the bottom, there are two buttons: 'Cancel' and 'Confirm'.

• **Delete users**

1. Select the users.
2. Click **Delete**.

The screenshot shows the 'User Management' window, similar to the one above. In this instance, the 'Delete' button in the top toolbar is highlighted with a red box. The table below it shows the same user data.

3. Click **Confirm**.

The screenshot shows a modal dialog box titled 'Delete'. It contains the text 'Deleted users will not be able to use MSPbots, please confirm whether to delete?'. At the bottom, there are two buttons: 'Cancel' and 'Confirm'.

- Removing a user in MS Teams will automatically set the user's status to disabled. To delete the user in the MSPbots app, delete the user manually in the User Management window.



- Disabling a user in MS Teams does not change the status in the MSPbots app. To disable the user in MSPbots, disable the user manually in the User Management window.

4. How to export user information

- In User Management, go to **Account Status** and select the status you want to include in the report.

User Management

Disable Set Role Enable Delete Free User Billable Users Account Status All New User

Excel Export PDF Export CSV Export Search Columns

<input type="checkbox"/>	User Name	Action	First Name	Last Name	Message Switch	Role	Manager	Status	Department	Mobile	Email
<input type="checkbox"/>	<input type="checkbox"/>	Disabled	...	...	...
<input type="checkbox"/>	<input type="checkbox"/>	Disabled	...	...	...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Disabled	...	...	...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Disabled	...	...	...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Disabled	...	...	...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Disabled	...	...	...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Disabled	...	...	...

1 of 2 pages (366 items)

- Click the format for exporting the user information. You can export using Excel, PDF, or CSV format.

User Management

Disable Set Role Enable Delete Free User Billable Users Account Status All New User

Excel Export PDF Export CSV Export Search Columns

<input type="checkbox"/>	User Name	Action	First Name	Last Name	Message Switch	Role	Manager	Status	Department	Mobile	Email
<input type="checkbox"/>	<input type="checkbox"/>	Disabled	...	...	...
<input type="checkbox"/>	<input type="checkbox"/>	Disabled	...	...	...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Disabled	...	...	...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Disabled	...	...	...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Disabled	...	...	...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Disabled	...	...	...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Disabled	...	...	...

1 of 2 pages (366 items)