Creating Users:

1. Once logged into the admin portal, click on "Users"

2. Click on the gear cog on the top right, and select "Add", and the following window will popup:

   a. **Employee Name**: Name of the user (we recommend using full names)

   b. **Employee Email**: Used for login purposes, not always needed. Email is a required field if you want your users to be able to login to their portal, or if they are going to use our mobile app.

c. **Send Registration Email**: If checked, the new user will get an email welcoming them to Crexendo, and will include a link to login and a temporary password.

d. **Mobile Access**: Keep checked if this user will be using the mobile app (please note: keeping this checked does not use up a mobile license, having that user login and having their mobile device added to the portal counts as using up a mobile license)

3. For the last 3 options, we recommend leaving those blank if you want to customize extension number, ring timeout, outbound caller ID, or final destination (those can always be adjusted later as well).

4. Once you press "Next", it will create the user and take you into their user profile.

Voicemail to Email and Outbound Cloud Faxing Setup

Voicemail to Email:

1. Within the user profile, click on the drop down next to "Forward" under Voicemail Options
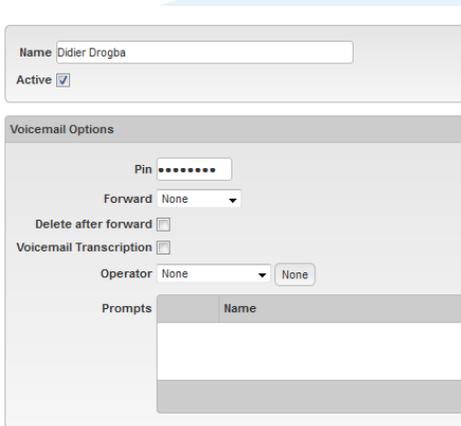
2. Set it to "other email" and enter the email address you want voicemails forwarded to, like below:

3. That's it!

Outbound Cloud Faxing:

1. Open up a user profile, and click on the gear cog on the bottom right of the Fax Options section:
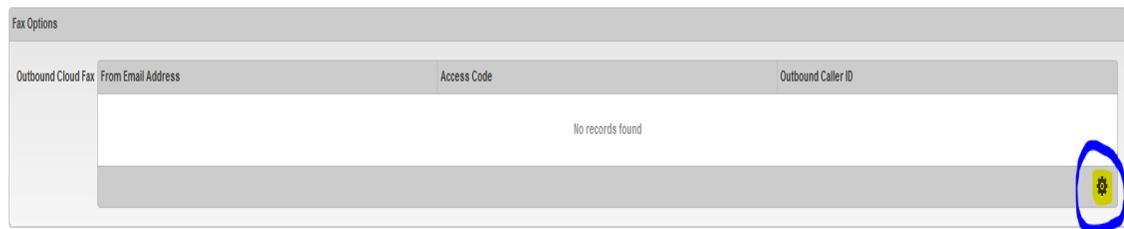
2. When open, it will look like this:
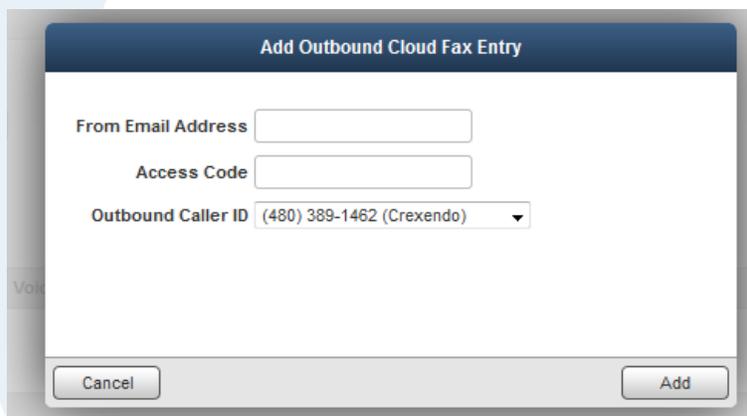
   a. **From Email Address:** The email address we want to send faxes from

b. **Access Code:** Acts as a password of sorts. If added, the access code will need to be added to the subject line of every outgoing fax, or else it will not go through

c. **Outbound Caller ID:** This is the "from" number that will display on your sent faxes, we recommend setting this to your fax number.

Deleting Users:

There are two options presented to you when you go to delete a user:
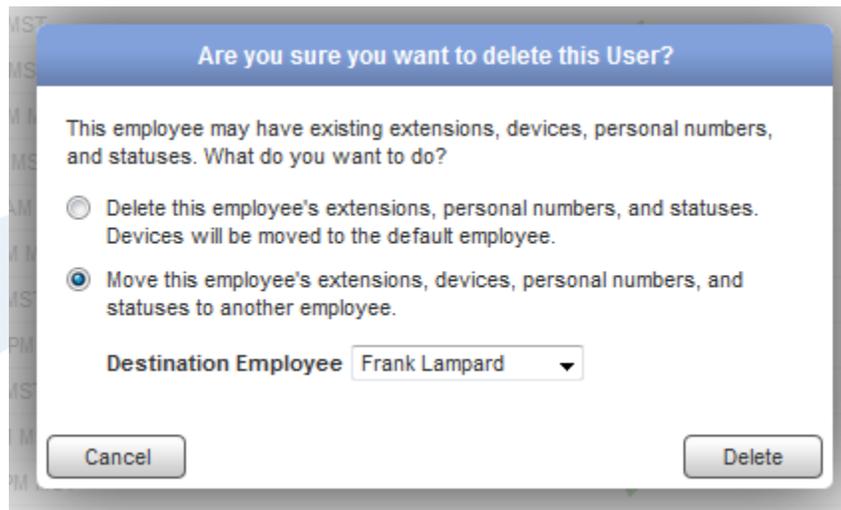
- The first option will delete any extension they own (personal, call park, auto attendant, ring groups, etc) including all call flow extensions. If we choose this option, the only items that will not be deleted are any devices owned by that user, they will be moved to the default user.

- If we choose the second option, it will delete the user and move over everything they own to a new user. In this case, if I delete the Eden Hazard user and choose Frank Lampard as the destination employee, anything that Eden Hazard owns will now be moved over to Frank's ownership, and Eden will be deleted as a user from the system.

If you are replacing one employee with another by renaming the user within the portal, you will need to contact Crexendo Support at 855-211-2255 to update the login email address associated with that user.

If you are unsure if a certain user owns call flow extensions that you need, I would create a new placeholder user (label it something obvious such as "placeholder") and make that the destination employee. This will remove the former employee from your system, while saving everything they own to a different user so you can sort through their former extensions later on.