

You have the profile « Organisation modification » in the Chorus Pro services portal. This profile authorizes you to modify the rights of the users attached to it,

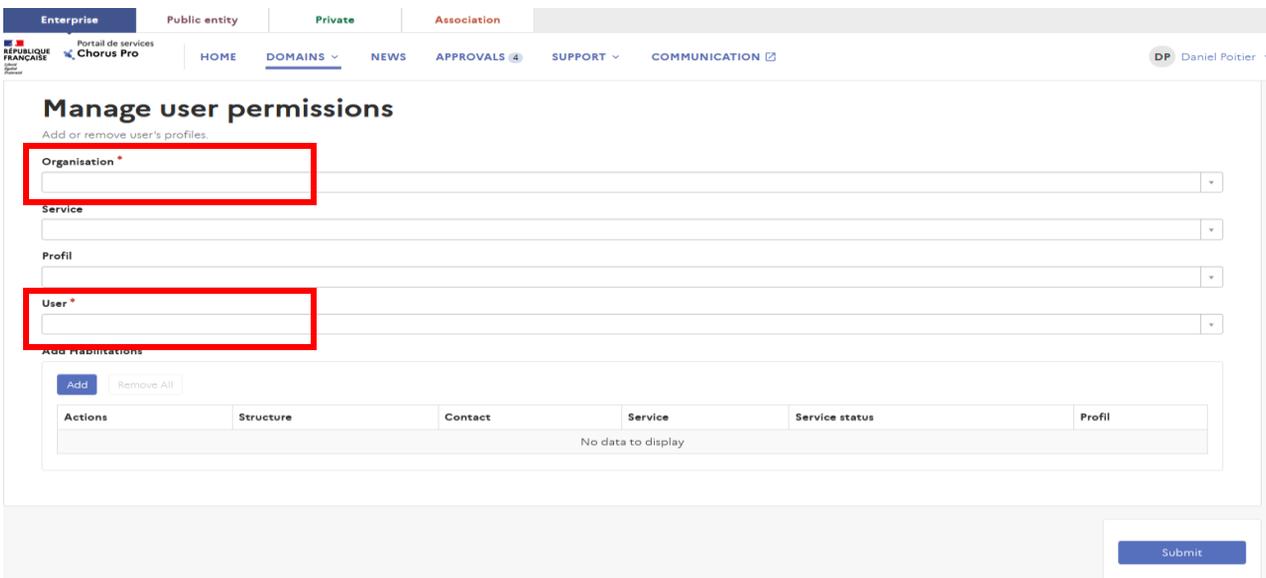
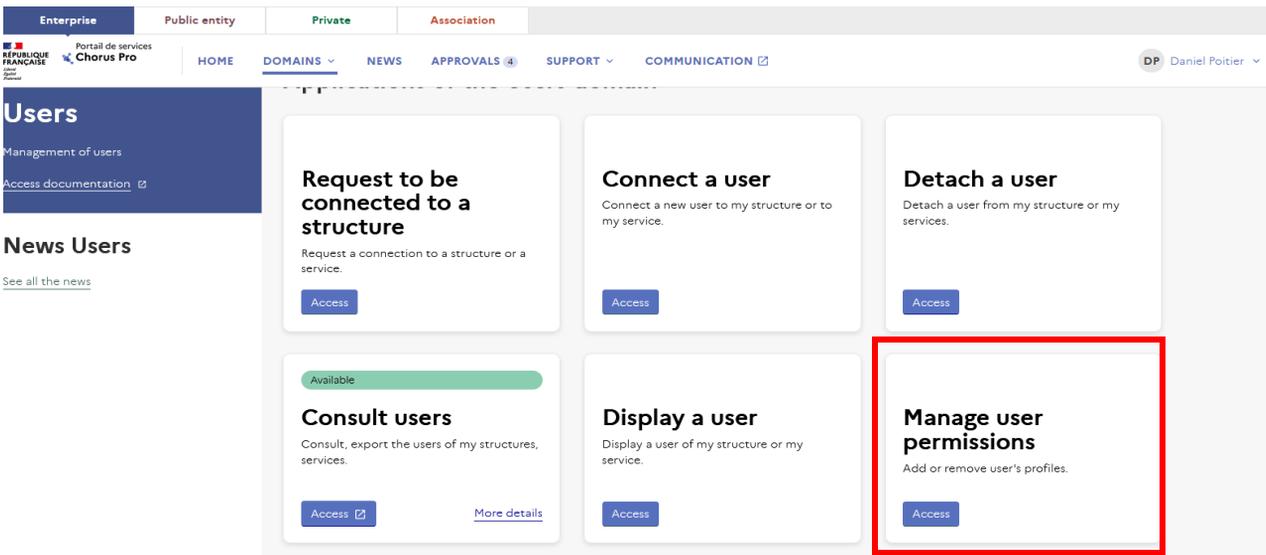
1. Check your profile

On the Chorus Pro services portal applications users can either be authorized on “consultation” or “modification” mode.

In consultation mode, they will only be able to view the activities of the application without being able to make any changes or process the invoices. In modification mode, they will be able to make changes to the application or process the invoices. These permissions are “profiles” assigned to the user.

The "Organisation modification" profile is only given to the main manager. This profile makes it possible to modify all the information of the structure and to manage the users.

You can access the profiles assigned to each user from the « Organisation » area > « User » area : clicking on the « Manage user permissions » application.

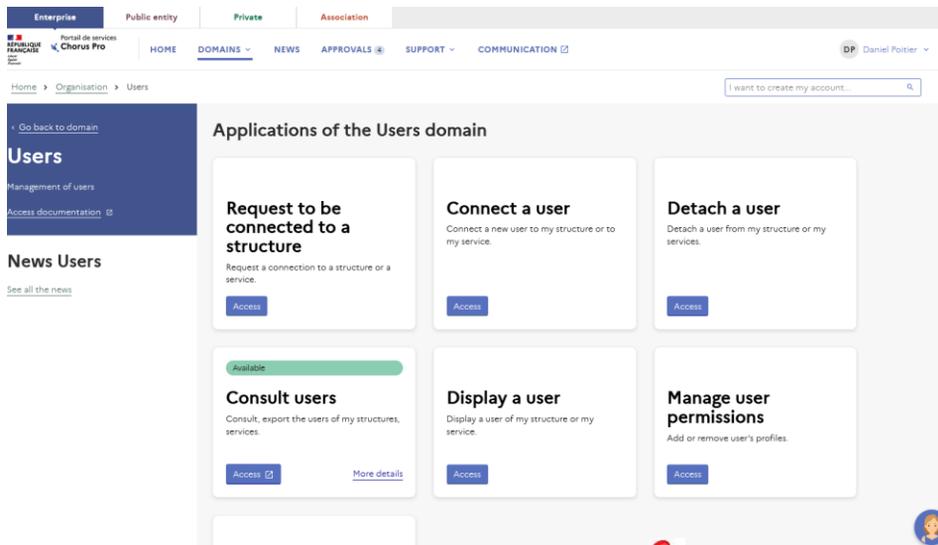


2.

Main activities of the manager

You can manage the activities impacting your users from the "Users" area.

A. Access to the « Users » area.



B. Connect a user to a structure

The main Manager of each structure is the guarantor of the connections to his structure and verifies, by validating the requests for connection, that the people he validates really work for his structure. These requests appear in the "Approvals" tab.

Anyone wishing to send or process an invoice on the Chorus Pro services portal must be connected to the structure that employs him (e.g his company). On the other hand, he **does not** have to be connected to the structures of his clients. So please refrain from asking to be affiliated to your client's structures as it serves no purpose.

The main Manager can also connect a user to the structure he manages on his own initiative (without waiting for a request). To do this, in the "Users" area, click on the "Connect a user" application and fill in the fields marked with a red asterisk. You will have to choose the level of connection you want for this user. There are 2 levels of connection: The structure level and the service level.

Connect a user

Connect a new user to my structure or to my service.

General information

User *

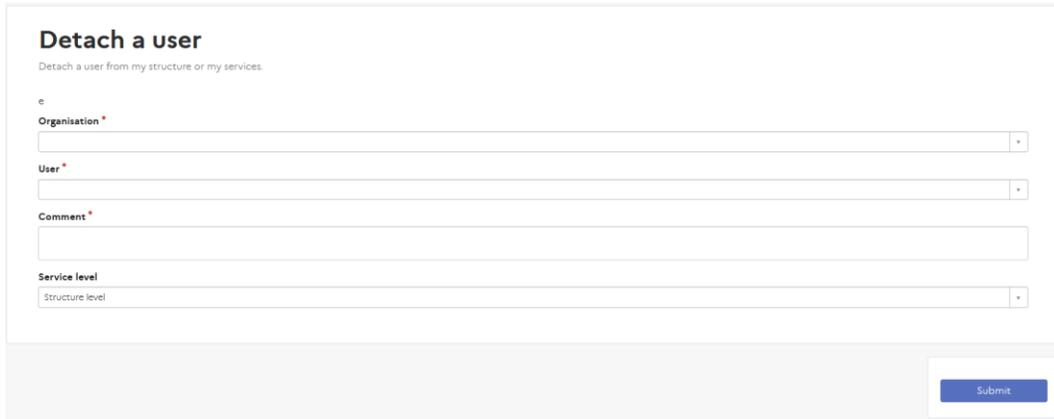
Organization of affiliation *

Service level

C. Detach a user from a structure

A user connected to your structure can be detached from it as soon as he no longer works there and should not have the possibility of depositing or processing invoices.

In the "Users" area, click on the "Detach User" application and fill in the fields marked with a red asterisk.



D. Display a user

You can display the list of users of your structure from the "Display a user" application of the "Users" area.

Once you arrive on the "Display a user" screen, you can choose the structure (1) you want to display if you have several. You can then choose the service (2) and finally you can search for users (3) from the search bar.

After finding the user you are looking for and clicking on the corresponding name, you will have access to a list of information about this user that you can export in CVS format, using the "Export" button.



You can find the detailed operating mode in the "Manag users" guide.