Add New User — Overview

August 18, 2026

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User Guide › Add New User

Overview

The Add New User area is used to record user identity and profile information. It supports entries such as Display name, Full name, Country, Title, Name, and Position.

Users working across sales, purchasing, warehouse, project, and finance activities can access related screens for Accounts, Contact, Call, Meeting, Task, Visit, Payment, and Product.

What you can do here

- Use **Accounts** to access account-related information.
- Enter **Display name, Full name, Country, Title, Name**, and **Position** when creating a user record.
- Use **Select** to choose applicable information for the user.
- Use **Save** to save the user record.
- Use **Save and Close** to save the user record and close the current screen.

Related pages

- Getting Started with Add New User
- Call
- **Add New User — Learning Path**
- Configure Accounts
- Configure Contacts
- Tasks
- Payments

- Projects
- Direct Order
- RFQ
- Direct Order
- Process