# Adding a User in Link2Feed

1. Click on the "Administration" heading on the menu on the left side of page. Click "Users".
2. Click on the "New User" button in the top right-hand corner

**General Details**

- First name / Last name: enter the user's first and last name
- Email: enter the user's email address
- Password/Password Confirmation: the initial password the user will use to sign in for the first time. They will be asked to change their password after logging in for the first time.
    - *At least 8 characters long*
    - *At least one uppercase and one lowercase letter*
    - *Include at least 1 number*
    - *Include at least 1 special character(!#$*&@)*
    - Link2Feed! – you can use this as the initial temporary password

**Applications**

- Select Case Management
- Select the following sub-applications:
    - Pantry

**Core Roles**

When adding roles to a user, it is important to **only** assign what the user needs to do their job. Only assign the Reporter role to someone who needs to be able to run monthly reports. If someone only needs to be able to do client intake, the only role that they will need in this section is Messenger.

| Role | Summary |
|---|---|
| Agency Manager | • Allows user to add/edit/deactivate users at their organization<br>• Allows user to add/edit/delete client visits<br><br>Other Features:<br><br>• Access to the Client Notes Review feature<br>• Access to promote a household member<br>• Access to set a client's profile as deceased<br>• Access to the Survey feature |
| Reporter | Allows the user to access the report system. The user will still need to be assigned the reports they can run. |
| Messenger | Allows the user to send messages in the system. |

Click "Save & Next" to go to the next section.

## Assigned Organizations

| Name | Active | Select | Pantry Visit |
|---|---|---|---|
| Practice Agency: CSFP | Inactive | All All | ☐ |
| Practice Agency: Link2Feed Volunteer Task Force | Inactive | All All | ☐ |
| Practice Agency: Pantry | Active | All All | ☑ |
| Practice Agency: TEFAP-USDA | Inactive | All All | ☐ |
| Practice Agency: TEFAP-USDA/CSFP | Inactive | All All | ☐ |

- Look for your agency name in the first column.
- Click on the Inactive button to the right of your agency name to allow access to your organization. The button will turn from a grey Inactive box to a green Active box.
- Then select the Pantry Visit checkbox to the right.
- Click "Save & Next".

## Additional Permissions

- Select: Data Entry and Quick Click

## Client Profile Tabs

- Check all the options in the list.
- There’s also a “Select All” option
- Click "Save & Next".

## Reports (you will only see this page if you assigned the user a Reporting Role)

- If you assigned a Reporting Role to a user, this is where you will assign the type of reports they are allowed to run
- Select Agency Report
- Click on "Save & Next".

## User Preferences

- Under "Show Dashboard Service Stats", select Yes.
- Click “Save & Next”