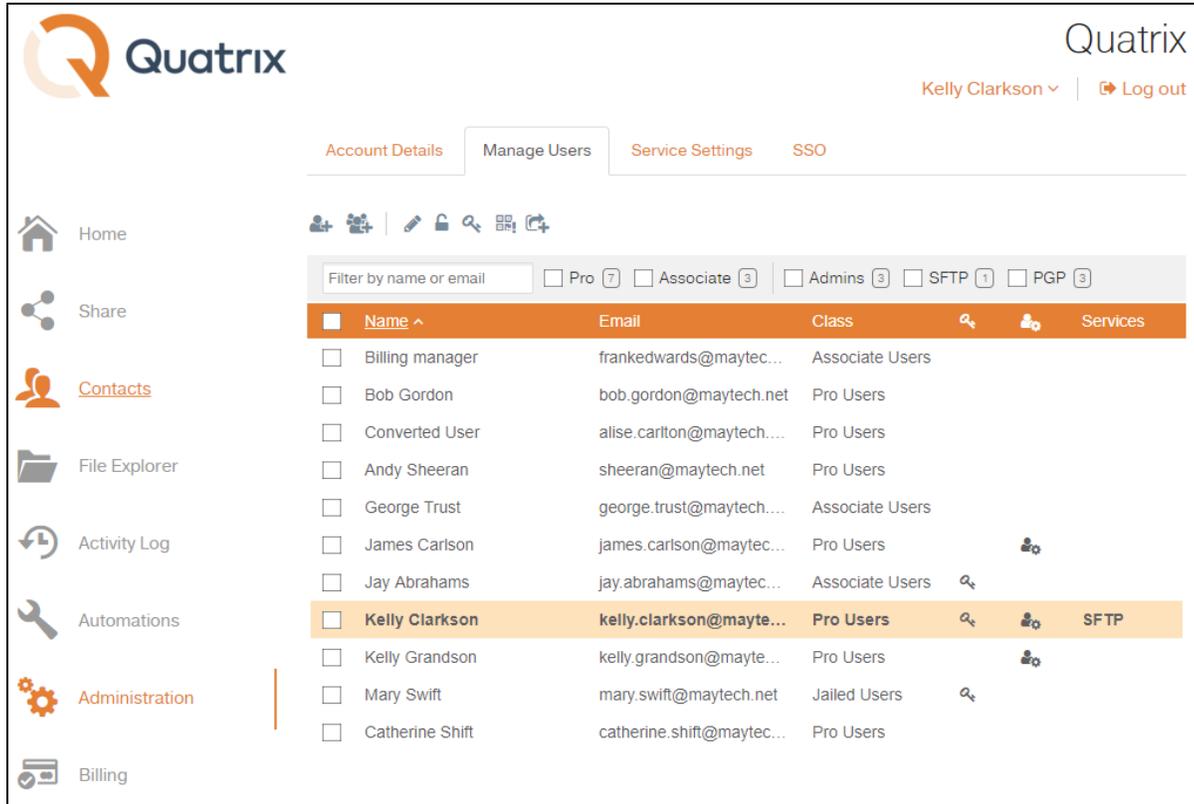


# User Management

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The owner or user with administration rights can manage account users on the Manage Users sub-tab of the Administration tab.



The screenshot shows the Quatrix user management interface. At the top, the Quatrix logo is on the left, and the user name 'Kelly Clarkson' and a 'Log out' button are on the right. Below the logo, there are tabs for 'Account Details', 'Manage Users', 'Service Settings', and 'SSO'. The 'Manage Users' tab is active. On the left side, there is a navigation menu with icons for Home, Share, Contacts, File Explorer, Activity Log, Automations, Administration, and Billing. The main content area displays a table of users with columns for Name, Email, Class, and Services. The table is filtered by 'Pro' (7), 'Associate' (3), 'Admins' (3), 'SFTP' (1), and 'PGP' (3). The user 'Kelly Clarkson' is highlighted in orange.

<input type="checkbox"/>	Name ^	Email	Class	Services
<input type="checkbox"/>	Billing manager	frankedwards@maytec...	Associate Users	
<input type="checkbox"/>	Bob Gordon	bob.gordon@maytech.net	Pro Users	
<input type="checkbox"/>	Converted User	alise.carlton@maytech...	Pro Users	
<input type="checkbox"/>	Andy Sheeran	sheeran@maytech.net	Pro Users	
<input type="checkbox"/>	George Trust	george.trust@maytech...	Associate Users	
<input type="checkbox"/>	James Carlson	james.carlson@maytec...	Pro Users	
<input type="checkbox"/>	Jay Abrahams	jay.abrahams@maytec...	Associate Users	
<input type="checkbox"/>	<b>Kelly Clarkson</b>	<b>kelly.clarkson@mayte...</b>	<b>Pro Users</b>	<b>SFTP</b>
<input type="checkbox"/>	Kelly Grandson	kelly.grandson@mayte...	Pro Users	
<input type="checkbox"/>	Mary Swift	mary.swift@maytech.net	Jailed Users	
<input type="checkbox"/>	Catherine Shift	catherine.shift@maytec...	Pro Users	

This tab displays a list of users with their emails, assigned class, generated PGP keys, admin rights and SFTP adjustments.

## Adding a user

If you would like to add a new user to Quatrix account, follow the steps below:

1. Click on the Add user icon from the top menu on the Manage users sub-tab.
2. Specify your user details and additional adjustments on the [Add user](#) dialog box:
  - a. user name and email
  - b. quota - unlimited by default (=account storage), you can specify the storage limit for this user
  - c. language - English or Chinese
  - d. user class - Pro, Associate or Jailed. Learn more about [user roles and their permissions](#)
  - e. administrator rights - only to pro users
  - f. billing - permission to manage invoices and payments (only to pro and associate users)
  - g. SFTP - permission to use SFTP
  - h. active - activate or deactivate the user. Deactivated users won't be able to log in.
3. Click on the Save button.

For additional security, you can adjust a [security PIN](#) for the user to enter while registering to Quatrix.

## Adding multiple users at once

In order to save your time for manual adding of multiple users (e.g. 50 or 100), you can use our Import users from CSV file feature. It allows to automatically add your users from previously generated CSV file.

Follow the steps below to add multiple users:

1. Click on the Import users button from the top menu on the Manage users sub-tab.
2. Prepare CSV file that contains the following fields:

- a. user email
- b. user name
- c. status (active or not)
- d. Administrator - - yes or no
- e. [user class](#) - pro, associate or jailed
- f. PIN - learn details on [Adjust PIN code user registration access](#).

## Import from CSV ✕

CSV Fields:

Field	Description	Required	Default
email	user email	true	N/A
name	user name	false	email
active	does user have active status, Y or N	false	Y
admin	does user have admin permissions, Y or N	false	N
class	user class	false	Pro Users
pin	optional PIN the user must enter when registering and setting password - 5 digits	false	-

File example:

```
email,name,active,admin,class,pin
email@quatrix.it,John,Y,N,Pro Users,12345
```

3. Click on the Next button, choose your CSV file and click on the Import.

## Import from CSV ×

Choose CSV file:

Users (1).csv

Data preview:

email	name	active	admin	class
mary.smith@maytech.net	11	Y	Y	A
lora.smith@maytech.net	12	Y	Y	A
sam.smith@maytech.net	13	Y	Y	A
...				

Import log:

4 of 4 users created

- ✓ 14 (bob.smith@maytech.net) created
- ✓ 12 (lora.smith@maytech.net) created
- ✓ 11 (mary.smith@maytech.net) created
- ✓ 13 (sam.smith@maytech.net) created

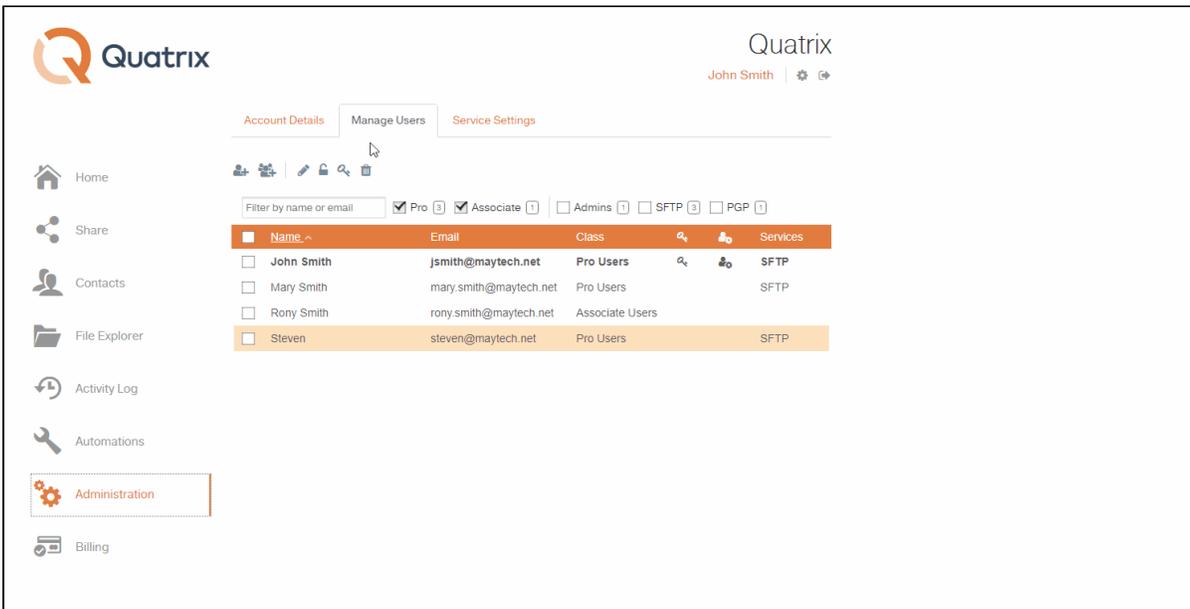
As soon as the import is completed, your users will be automatically added to the account.

Emails already stored in Quatrix won't be imported. If the format is not corresponding, the import won't be allowed until it is corrected.

SFTP can't be adjusted while importing. It can be adjusted while editing one or [multiple users](#).

A CSV file would be rejected if it contains more records than available licences.

## Editing a user



To change user details or update permissions:

1. Select the check box next to the user you would like to edit and click on the Edit icon from the top menu.
2. Change user details in the [Edit user](#) dialog box.
3. Click the Save button.

You get the notification that the user's profile has successfully been edited.

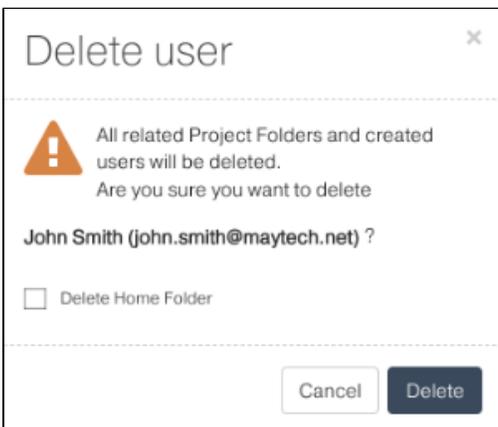
Possible user update cases:

- if you would like to set the limit for user storage, specify the quota amount.
- user class update allows you to [control account access permissions](#) e.g. you can update pro user to jailed user that limits the access to only Projects shared with me folder.
- grant administrative or billing rights if you would like your user to cover account administration or invoice payment.
- enable or disable [SFTP](#).
- activate or deactivate the user - make your account unavailable to access.
- switch the language of the user: from English to Chinese or vice versa.

## Deleting a user

To delete a user select the check box next to the user you would like to remove, click on the Delete icon from the top menu and confirm the deletion. The deleted user won't be able to access their Quatrix account.

If you tick the Delete Home Folder check box while confirming the deletion, all files of the selected user will be deleted. If not, their home folder will stay in the file system and you will be able to access it.



## Converting a contact to a user

If you shared files with someone whose email wasn't used in Quatrix account, this email is automatically written to My Contacts list. You can easily convert your contact (either My or Site) to Pro user by selecting the contact and clicking on the Convert icon on the menu or selecting an appropriate menu option from the right-click menu.

It will soon be released a new version of Quatrix allowing to choose a user class during the conversion.

The conversion of users to contacts is not possible.