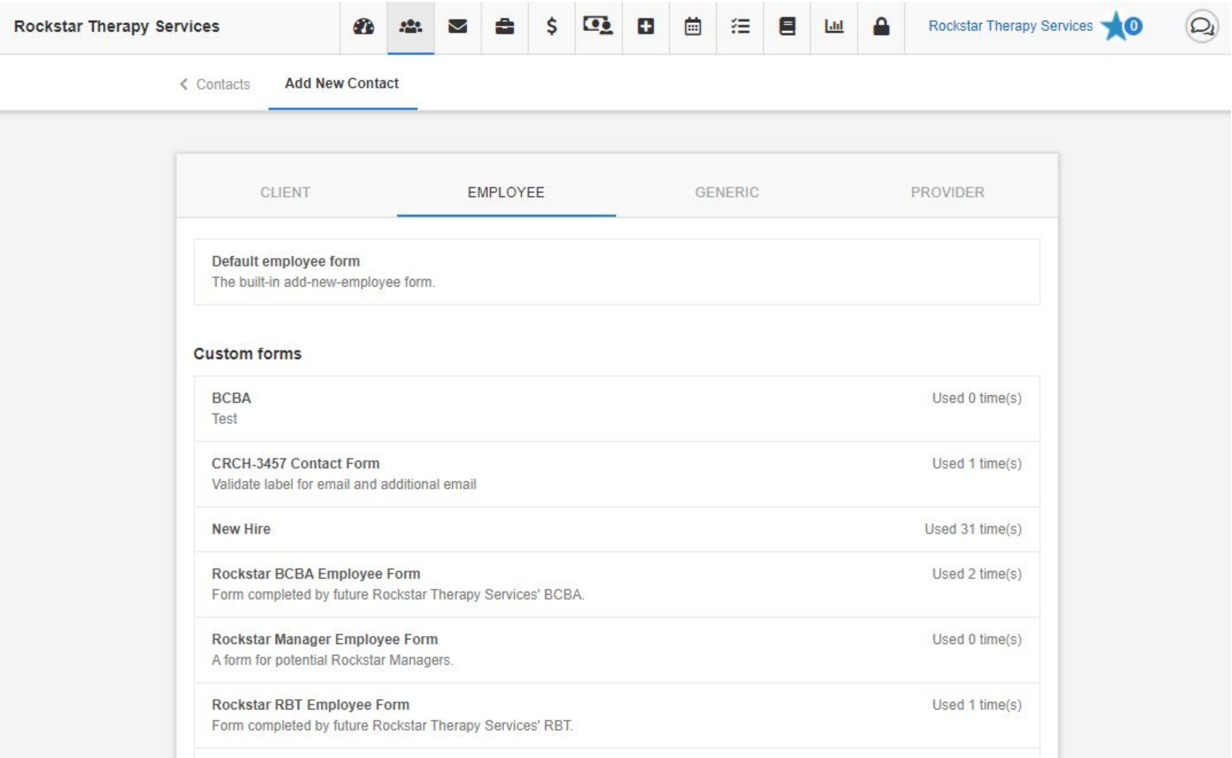
Create Contacts & User Access

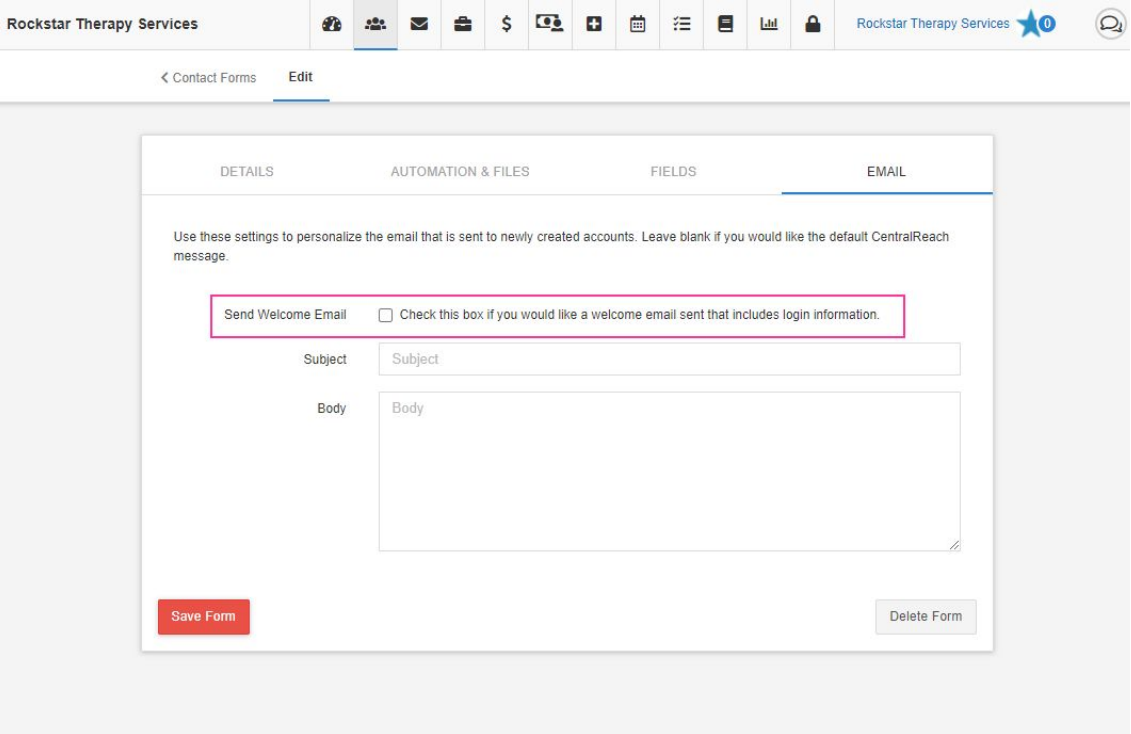
SSO Release 7.7.0

Creating New Contacts



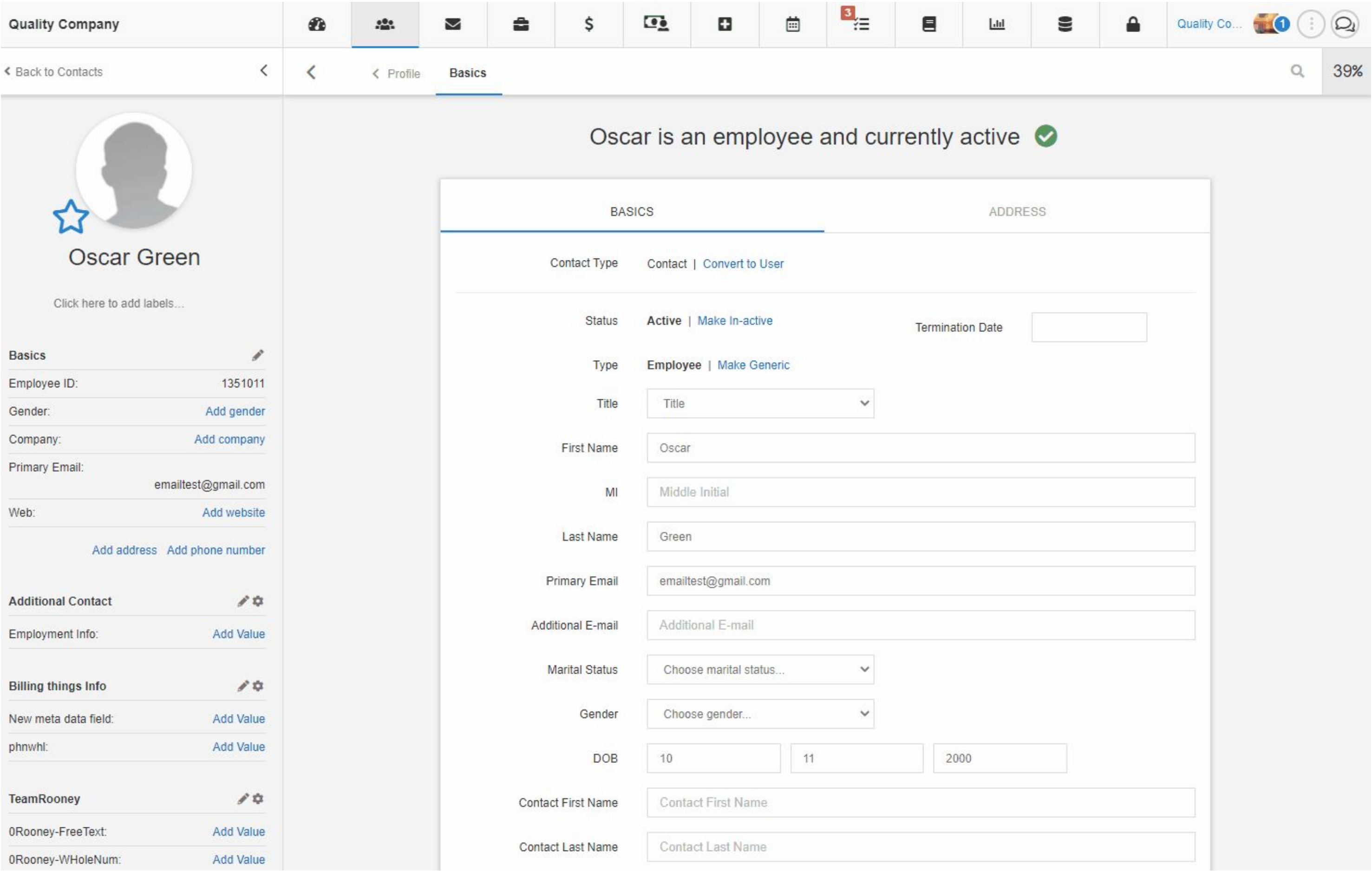
- Users are able to create contacts using a default form or a custom form.
- When a new contact is created with a default form, the contact gets access to the application with the email address added when completing the form as the username. Please note that the new user has to be informed of the username and advised to go through the Password Reset/First Time User workflow to set a password.
  - If the default form is completed without an email address, the contact will not be given automatic access.

Custom Contact Forms



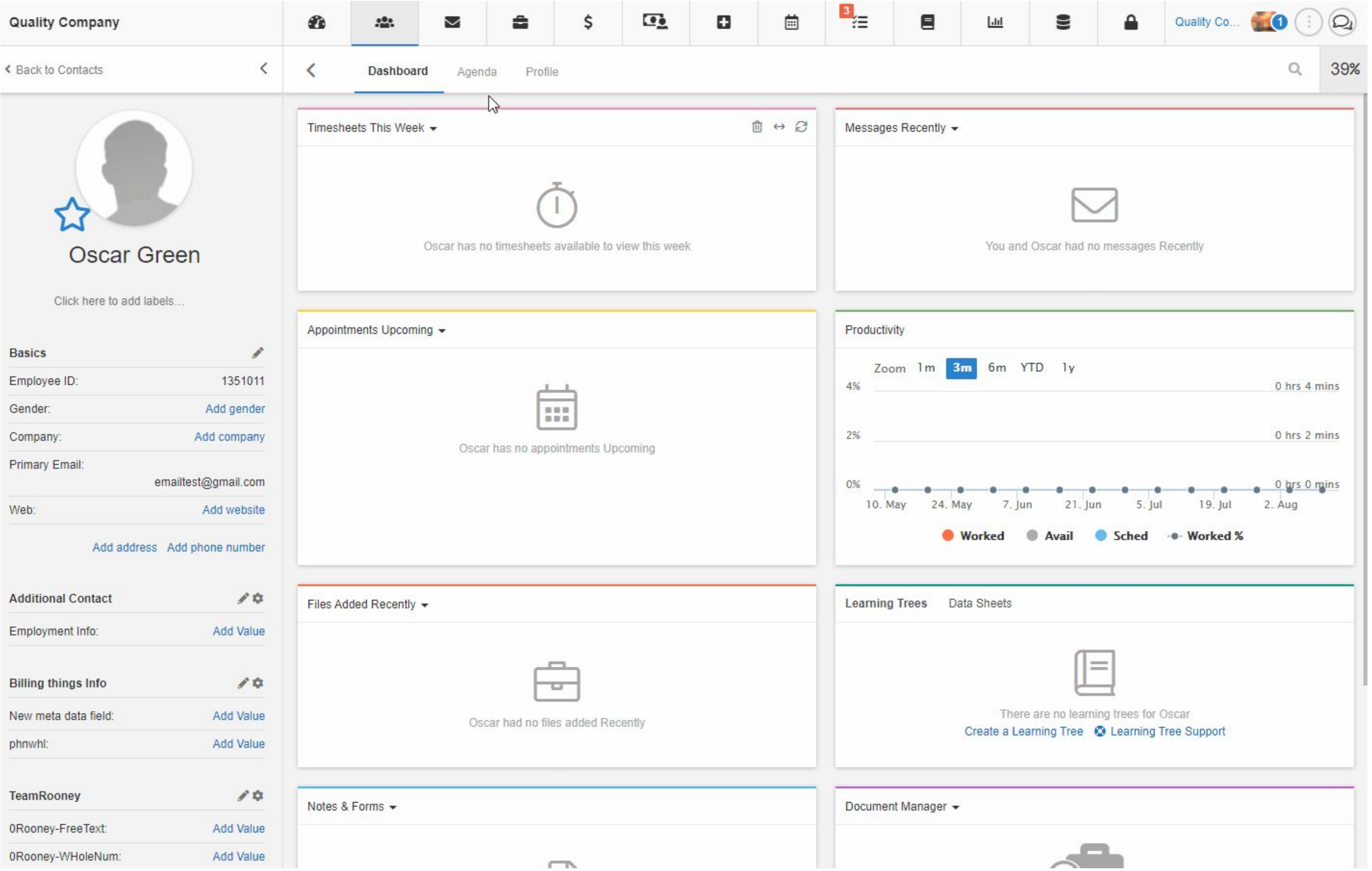
- Creating contacts using a custom contact form, allows the contacts to be created and given access depending on the organization's requirements.
- Enabling Send Welcome Email on the contact form will automatically give the users access to the application and an email is sent to the new user to set their password.
- If the custom form does not have Send Welcome Email enabled, the contacts created with the form will not get automatic access to the application and will need to follow the same workflow as the default contact form (where "convert to user" is clicked and the new user is notified manually).

Give Contacts Access



You can give contacts created with a custom form without Send Welcome Email enabled, by going to the contact's Basic Profile and clicking on "Convert to User".

Remove Access



When a contact has access, you can remove the user's ability to access your CentralReach instance by clicking "Remove Access" from the contact's Basic Profile.