Manage Portal Users

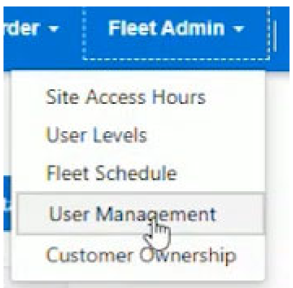
User Management lets a Fleet Administrator view members of the fleet, create new contacts, and control each contact's portal access. This guide covers viewing contacts and onboarding or removing portal access. There are three user categories:

- Fleet Manager/Administrator – full access to all functions on the portal; can be more than one
- Fleet Delegate – has limited access to functions and approval limits
- Driver – has limited access to functions on the portal

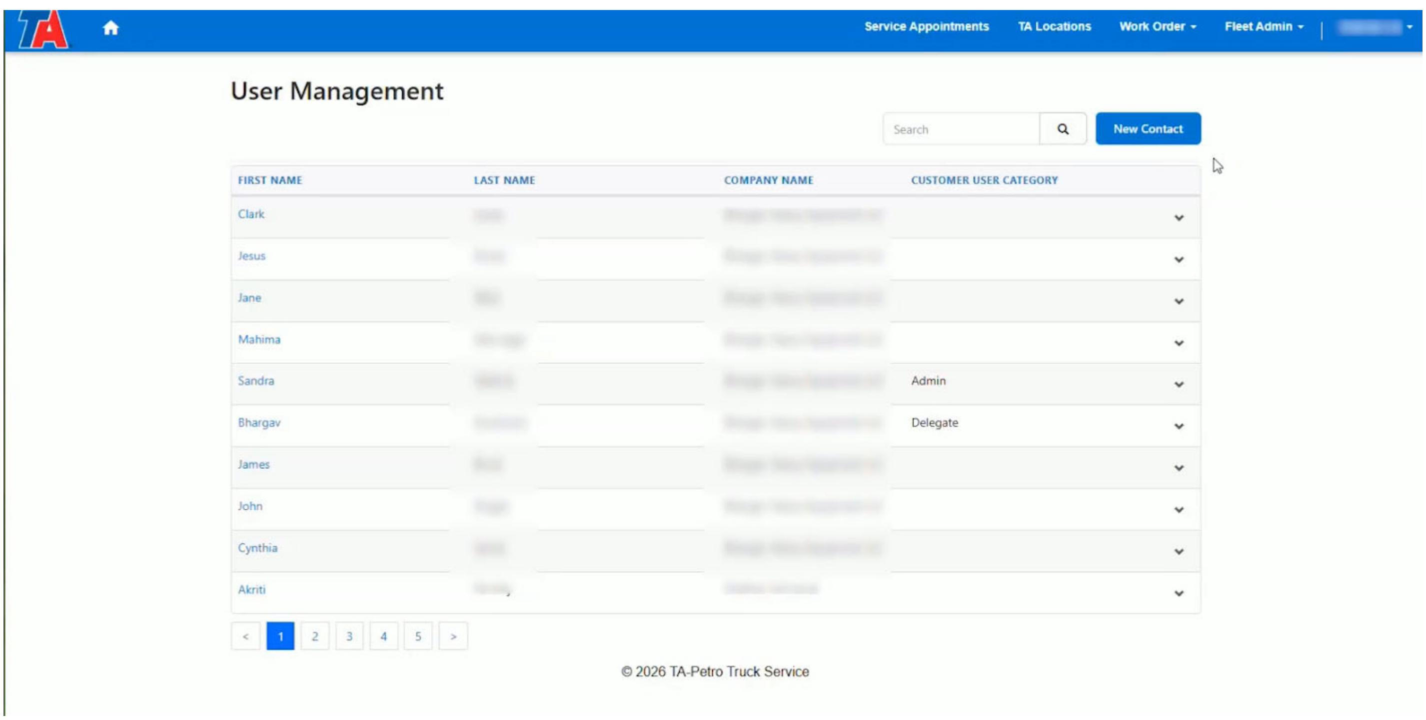
Note: Portions of application pages are grayed/blurred out to conceal and protect identities.

Opening User Management

1. In the top navigation bar, click **Fleet Admin**, then click **User Management**.



2. Review the list of fleet contacts. Use the **Search** box to find a specific member, or click **New Contact** to add one.

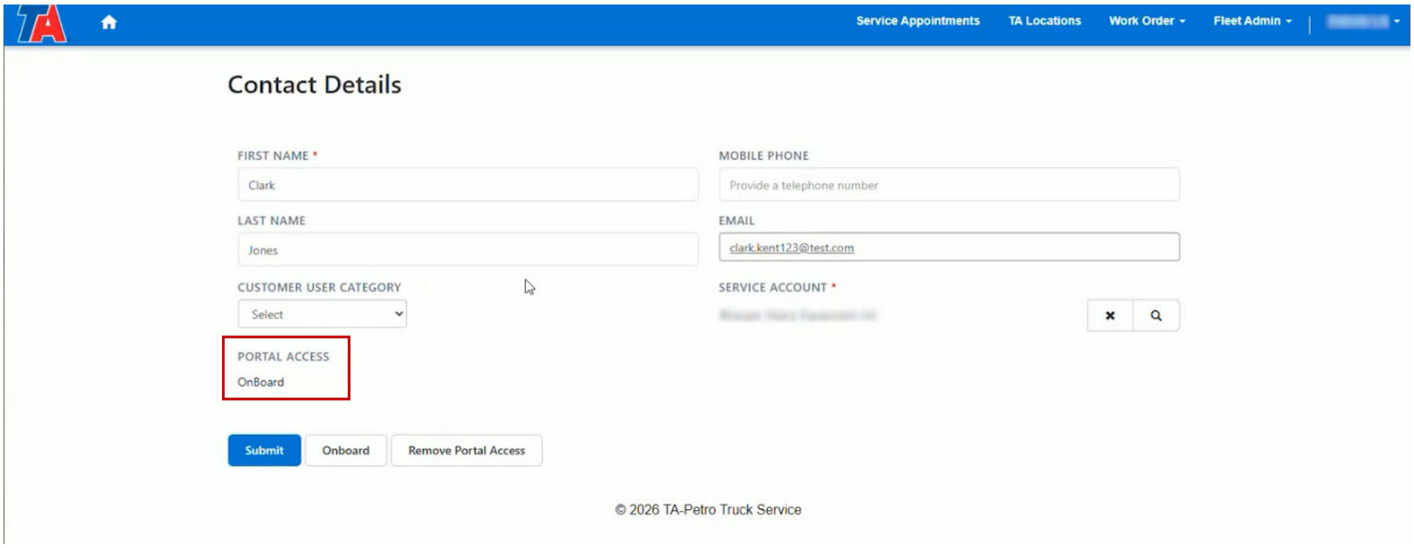


User Management shows the contacts within your account. From here you can on-board or off-board them from portal access and set the type of access.

Viewing a Contact's Details

3. In the contact list, click a contact's name to open the **Contact Details** page.

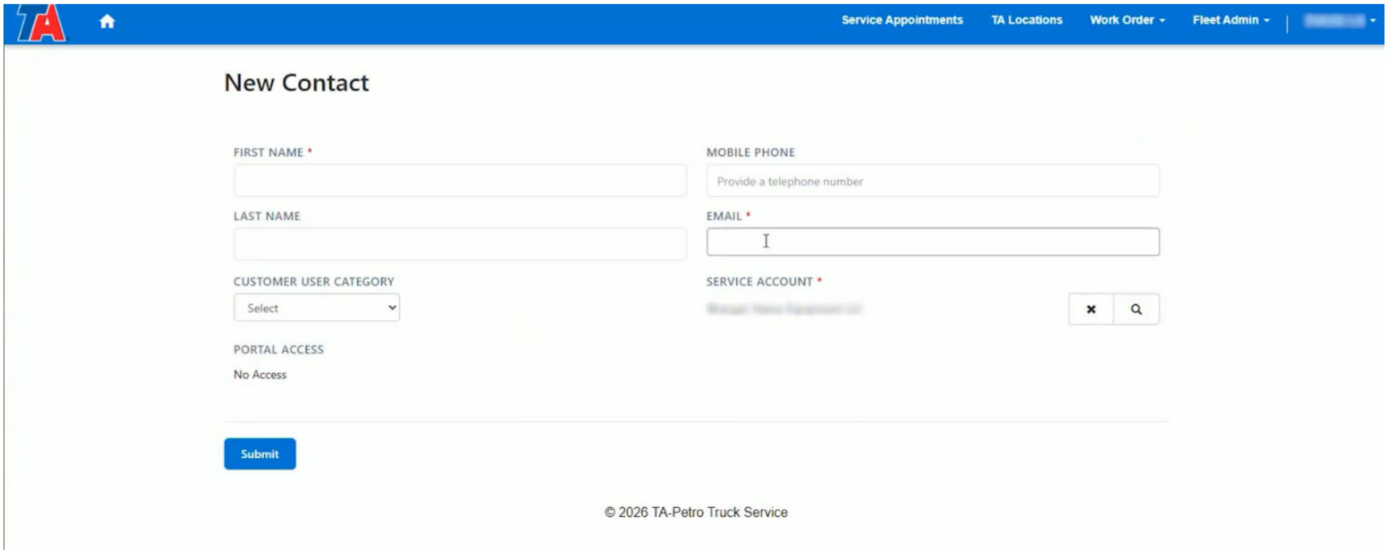
4. Review the contact's information, including the **Service Account** and the **Portal Access** status.



*A Portal Access status helps you confirm whether a contact already has access to the portal – status of **Onboard**, and which account they are associated with. If their access has been added yet or has been removed, it will show **No Access** as the status.*

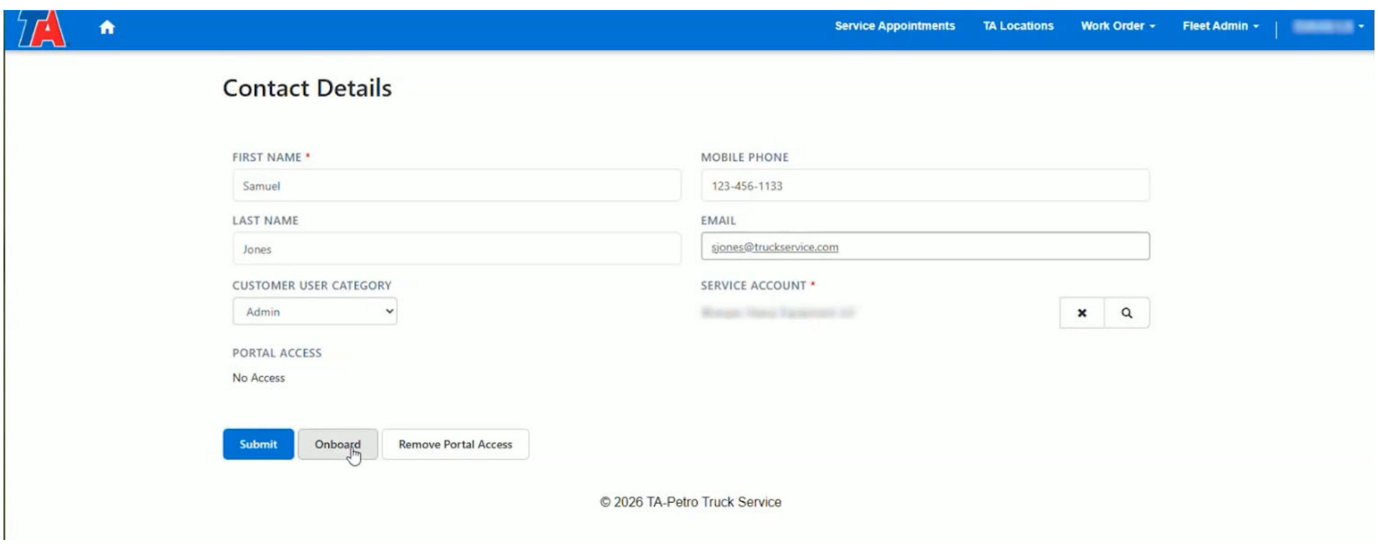
Adding a New Contact / Fleet Member

5. To add a fleet member who has never had access, click **New Contact**. Fill in the required information.



At this point, the contact has been created, but needs to be granted access.

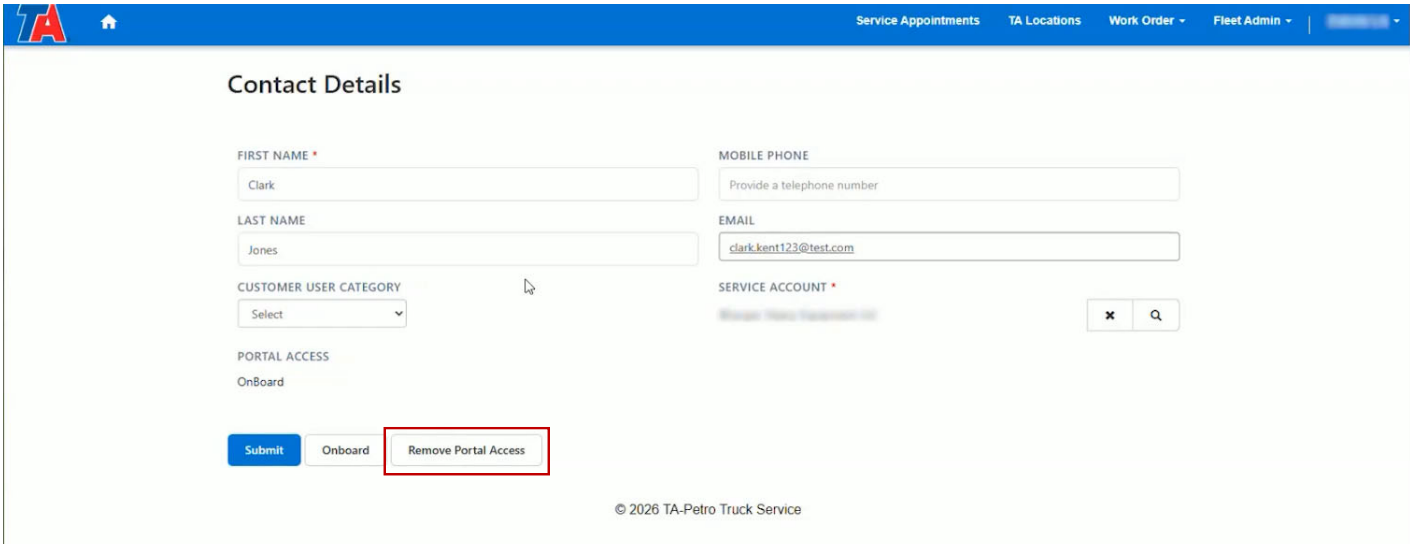
6. Click **Onboard** to give portal access to the new contact.



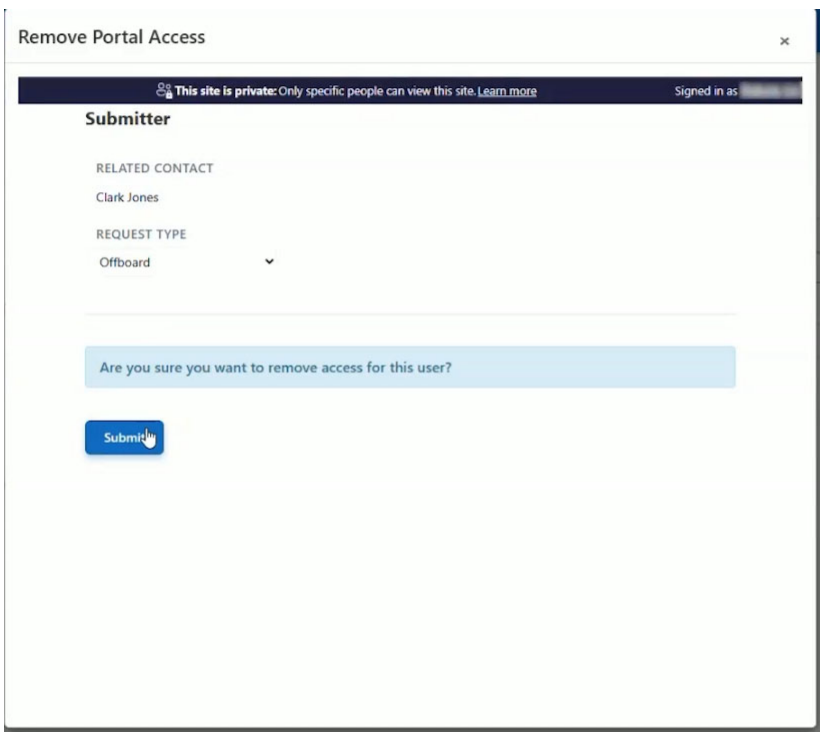
The new contact will receive an email with instructions on how to log into the portal.

Removing Portal Access

7. On the **Contact Details** page, revoke access by clicking **Remove Portal Access**.



8. Click **Submit** to save your changes.



This Fleet Member will not be able to log in. You can onboard if they need access again.