Service Insights: Adding (and Editing) Users

Updated August 2026

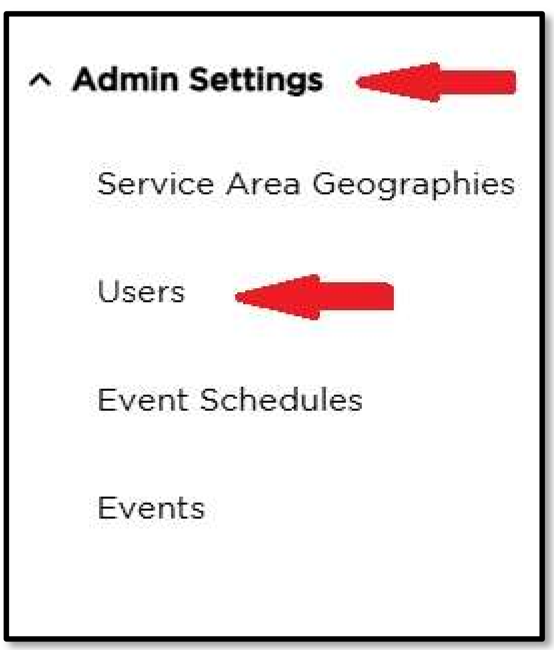
As an Account Admin you can add new users, deactivate old ones, and re-activate inactive ones. When you are creating a user, you have multiple options of access, and whether you would like to use an email address or a username.

Email and Username: While we suggest that the admins should use their own email addresses, Service Insights allow for the use of Usernames in lieu of email. You can use an email or username for multiple users but you cannot use the same email or username twice. Be careful of the spelling. You cannot change it once it's made. You can only deactivate the user and start anew.

Inactive and Active: Just as it sounds, if a user is active, they are active in the pantry, whereas an inactive one is one who no longer works there, but can be made active again.

Go to the hamburger

Under Admin settings, choose Users



Creating New Users

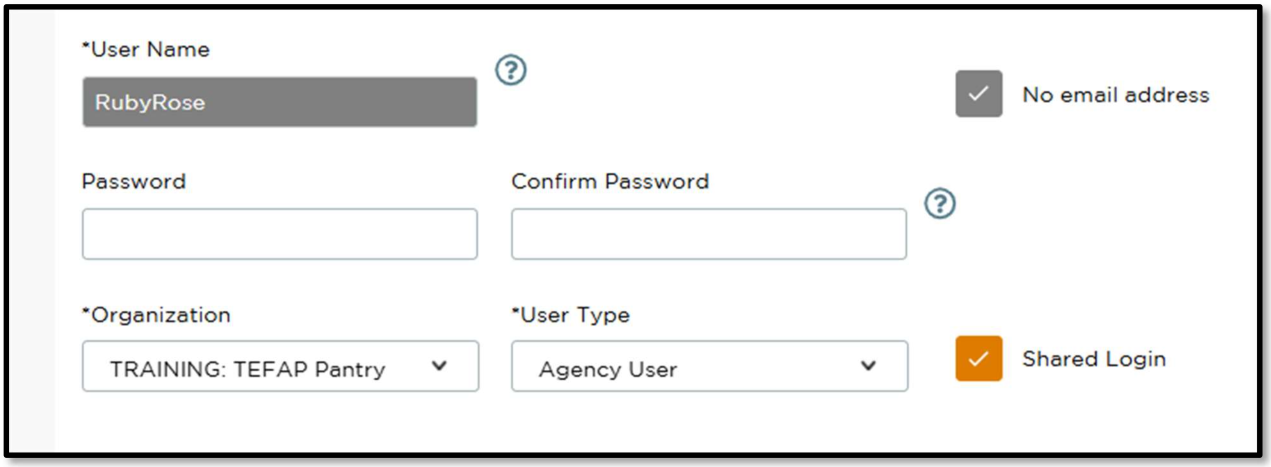
Click the orange Create New User Button on the upper right side

This will take you to the User creation page, it's fairly straightforward.

- Fill in the First and Last Name fields. If it is a shared account, you can also use a generic name/phrase, such as Intake Volunteer.
- The Job Title can be whatever you like, such as intake coordinator or director, etc.
- You don't need to provide a Phone Number, though we recommend entering some numeric values, even if it's 00000000, because if you ever need to go into the user to change or update any fields, and a phone number was not previously provided, you'll receive an error.

- The Email Address field can either be a username or an email address.
    - If you click the no email address, it will change it to a Username automatically.
    - The email or username must be unique and cannot be reused, even if you inactivate the user.

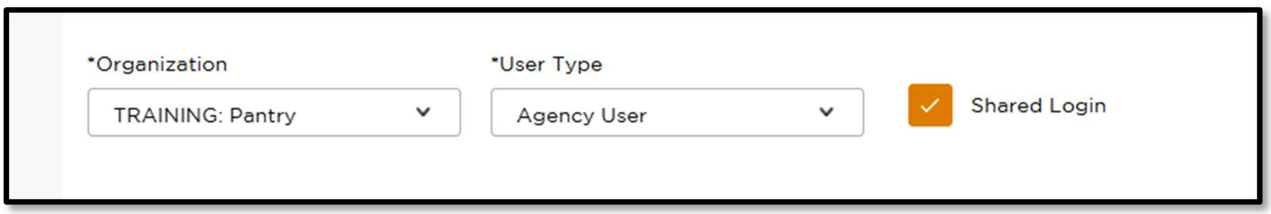
From here you will need to create a password. Enter the password a second time to confirm they match. It will give you an error if they don't.



There are requirements for the password.

- It must be 14-30 characters long.
- It must contain one uppercase, one lowercase, one number and one special character.
  - For example: ThisIsAPassword1234! Or Th!sIs4Password, etc.

Under that is the Organization and user type.
The organization is your pantry you won't see anything else, but user type has several options.



Here are details of User Role Descriptions and access types:

- **Agency Viewer** =
  - Can only see Essential Statistics Report (and nothing else)

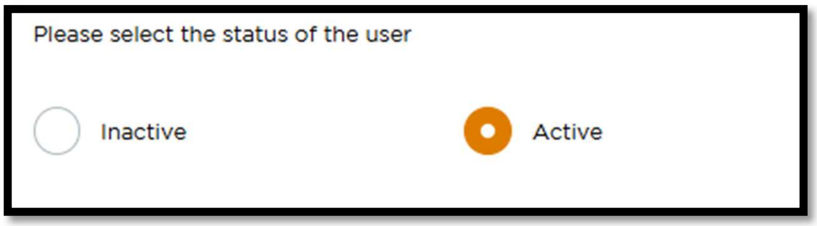
- **Intake User** =
  - Can edit Households
  - Can collect data on intake
  - Can flag duplicates but not merge them

- **Agency User** =
  - Can View Households Visit History
  - Can edit Households
  - Can flag and merge duplicates
  - Can collect data on intake
  - Can View in app reports like TEFAP compliance, quality control, etc.
  - Can view summary statistics
  - Can export de-identified service and neighbor data (but not identified data)

- **Agency Admin** =
    - Create users
    - Can Create and maintain events
    - Can View Households Visit History
    - Can edit Households
    - Can flag and merge duplicates
    - Can collect data on intake
    - Can View in app reports like TEFAP compliance, quality control, etc.
    - Can view summary dashboard statistics
    - Can export de-identified and identified service and neighbor data

Choose whatever level of access you would like your staff to have under the User type and if it's a shared account check the Shared Login box. The most common User Type for non-admins, is Agency User.

Then just make sure Active is selected and click Save. The user will appear on the Users page

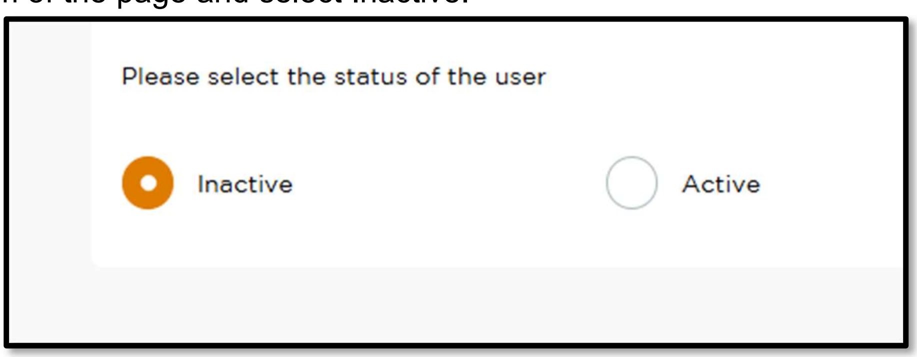


Inactivating and Re-activating a User

To **Inactivate** a User, go to the Users page and from the list of Users, look for the name you wish to update, then click on that name.

Rose, Ruby	intake	Agency User	Yes	Active
Staff, Intake	INtake	Agency User	Yes	Active

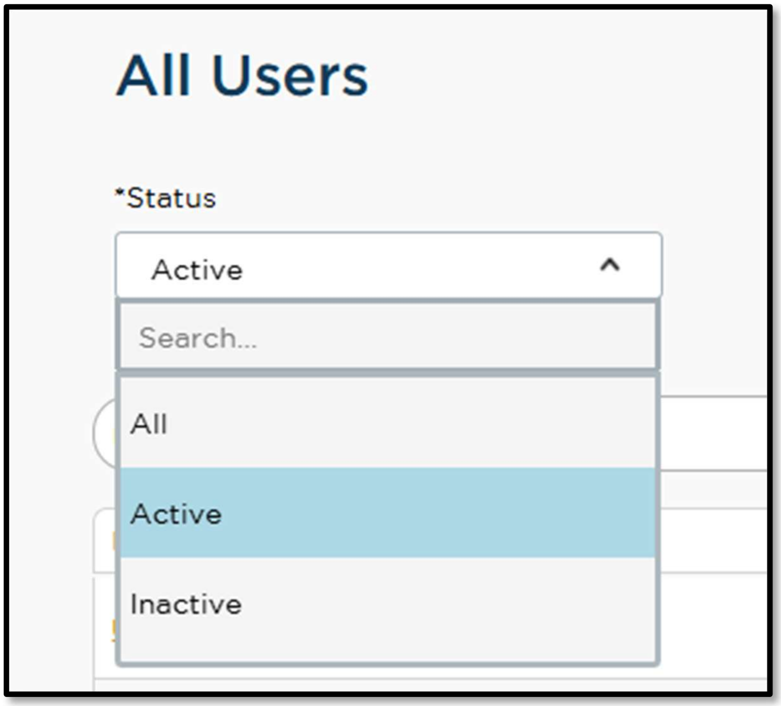
Scroll to the bottom of the page and select Inactive.



Once you hit Save, they will be inactivated.

To **Re-Activate** a User, go to the Users page, and above the list of Users, look for the “Status” drop down.

You can either choose All or Inactive, either one will show the inactive users.



From the list of Users, look for the name you wish to update, then click on that name. Once in their profile, scroll to the bottom and choose Active. That will bring them back into active rotation.