

Buyer Portal – Admin

How to manage your account in the OFA platform

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Admin

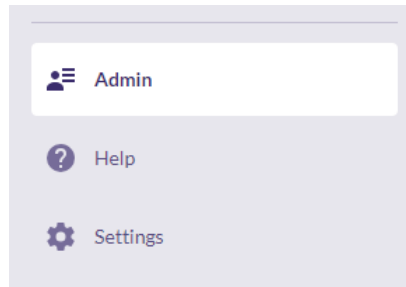
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Organisation Units

Organisation Units is how you divide up your users for specific projects and divisions.

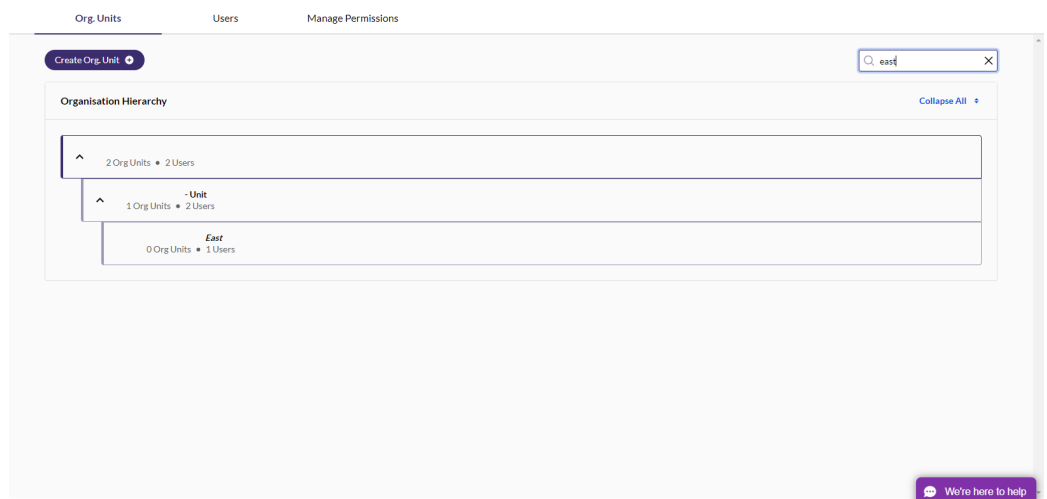
User permissions will determine what options are available to you on the left-hand side of the navigation.

To manage your account, click the **“Admin”** option in the menu on the left.

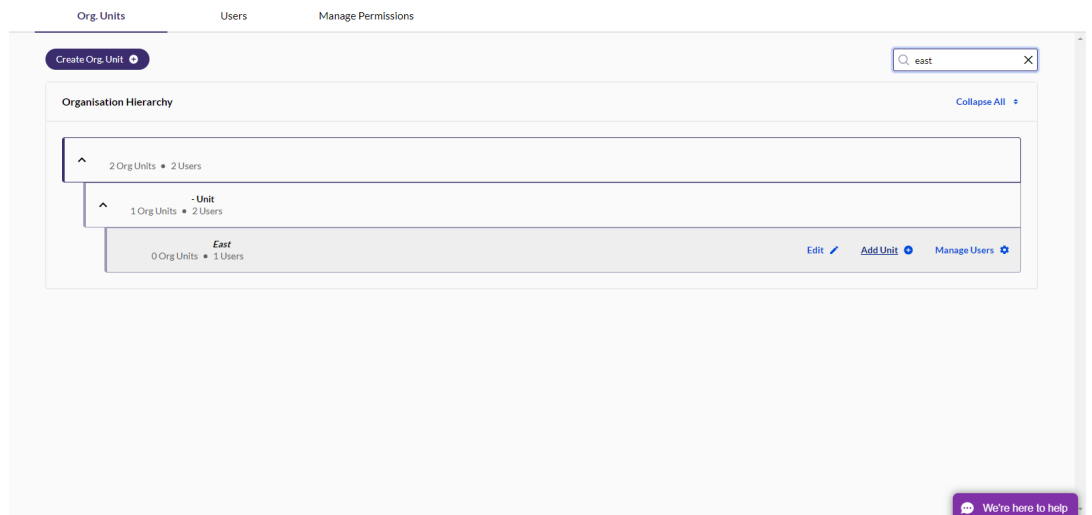


The first page you will see is **“Organisation Units”**. Here you can see how the organisation is divided. By default, every account on the platform will have one organisation unit.

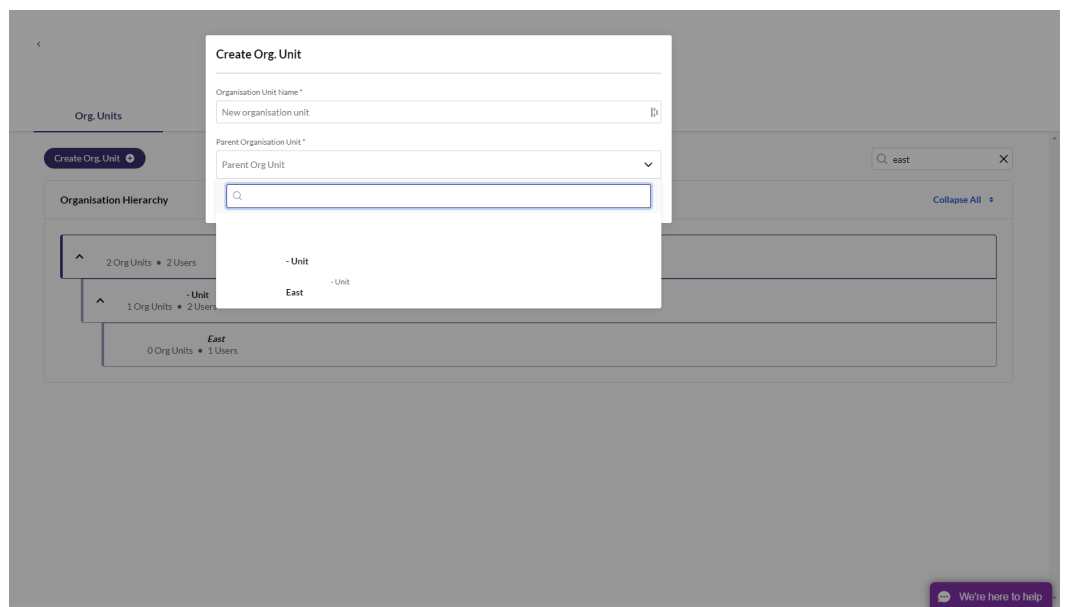
The **“Organisation Hierarchy”** shows all units within the organisation and which parent unit they fall under. You can use the search to quickly find a specific unit without having to sort through the hierarchy.



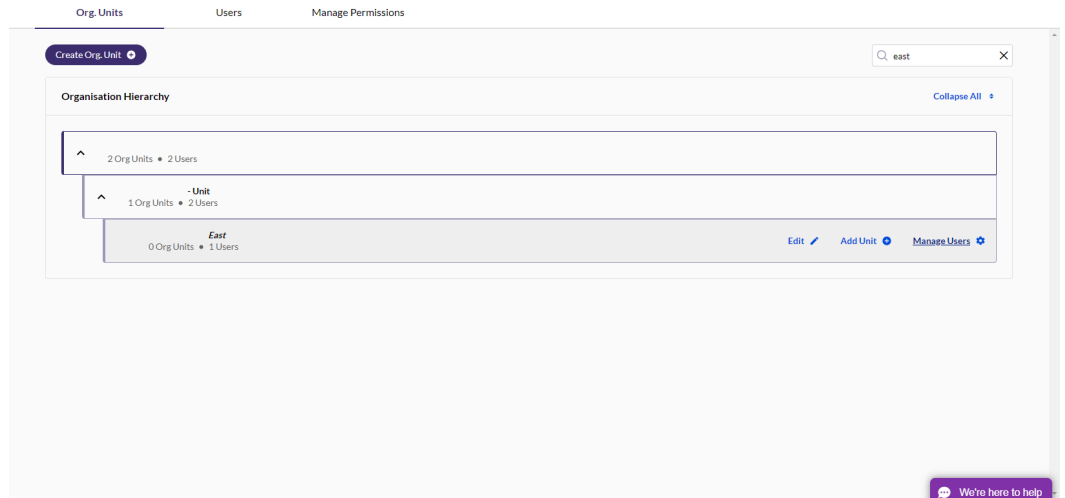
To create a new unit, click **“Create Org. Unit”** at the top, or **“Add Unit”** when hovering over a unit.



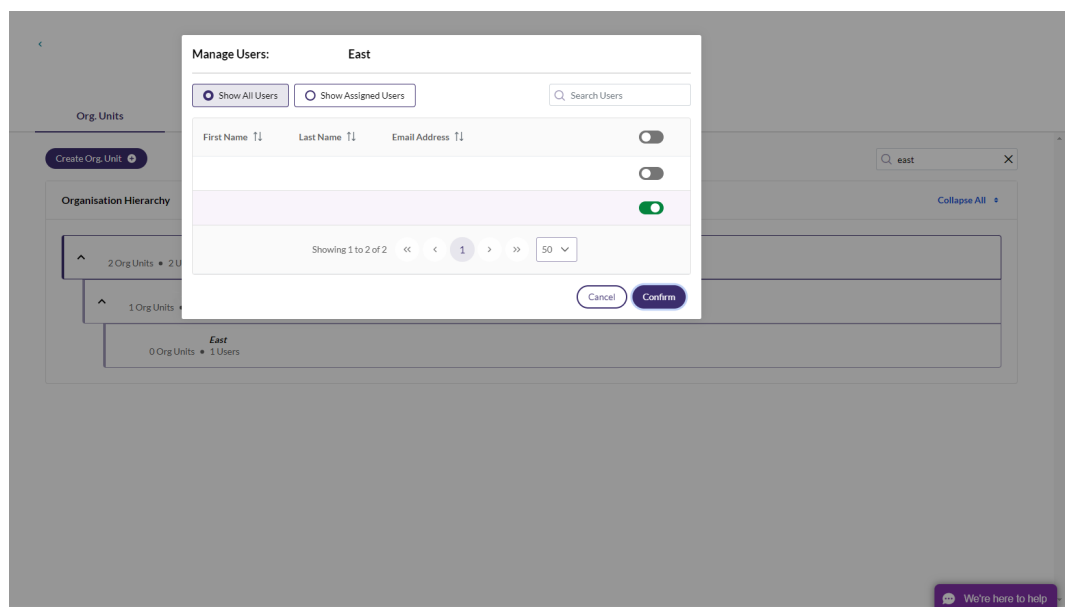
Now enter the unit name, and where in the hierarchy this unit falls – if it is under a different unit, select this from the list.



After you have created the new unit, you can add users into it with “**Manage Users**”.

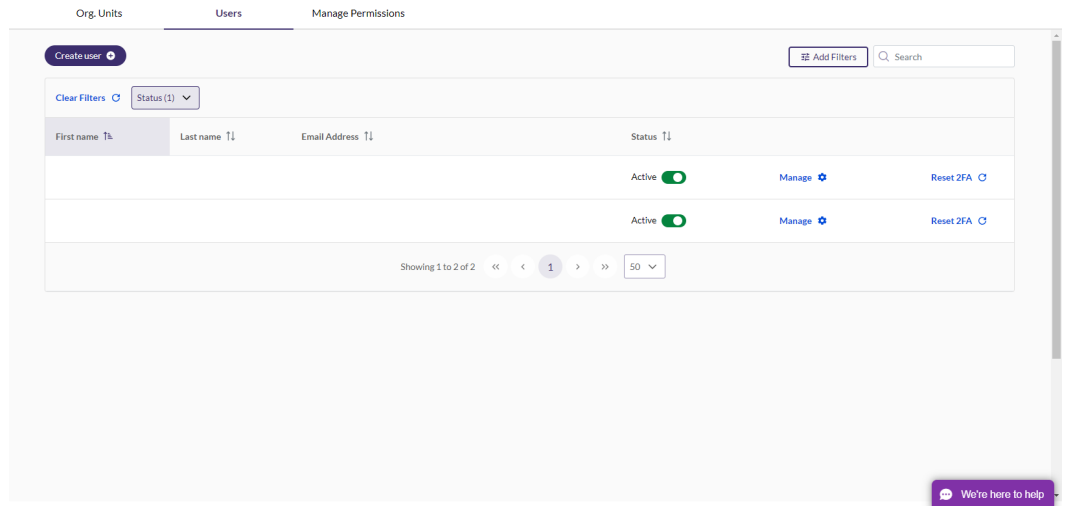


Add multiple users by clicking the toggle on – you can use the search bar to find users quickly too.

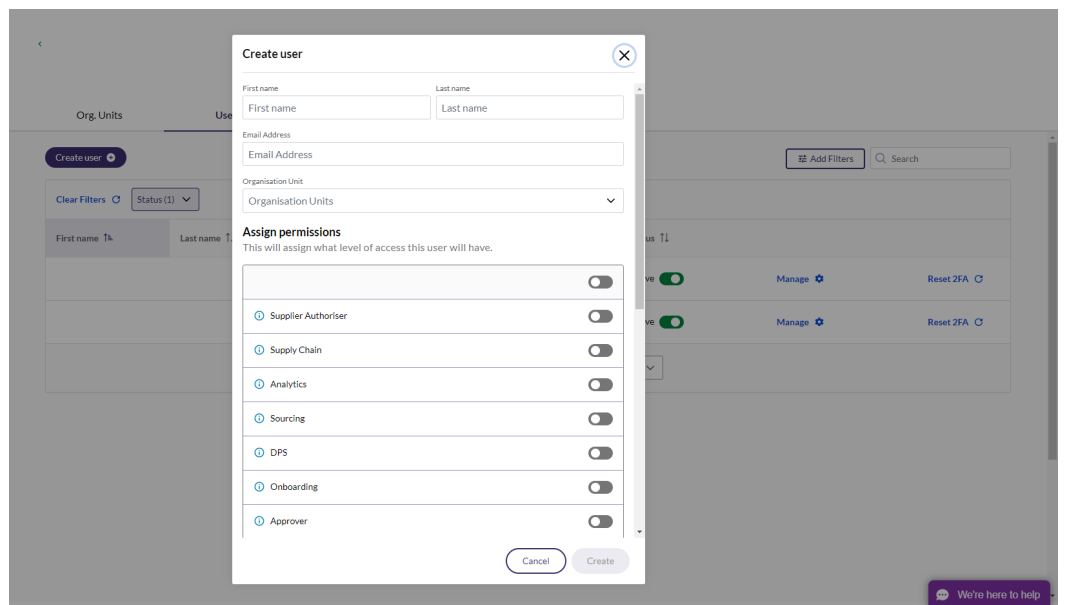


Users

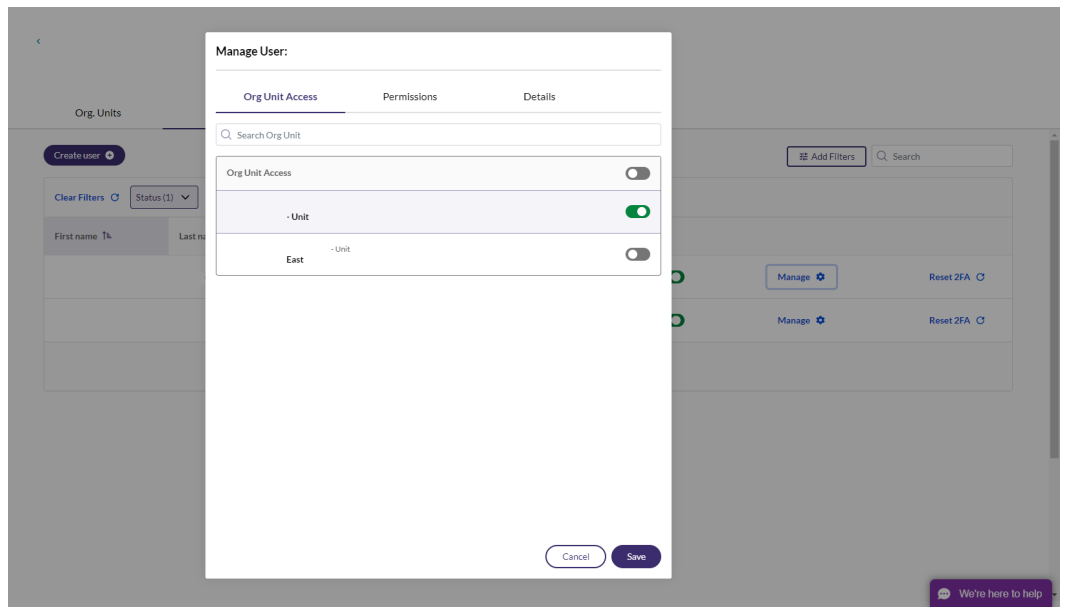
The next tab you will see is **“Users”**. To create a new user, click **“Create user”** on the left side of the screen.



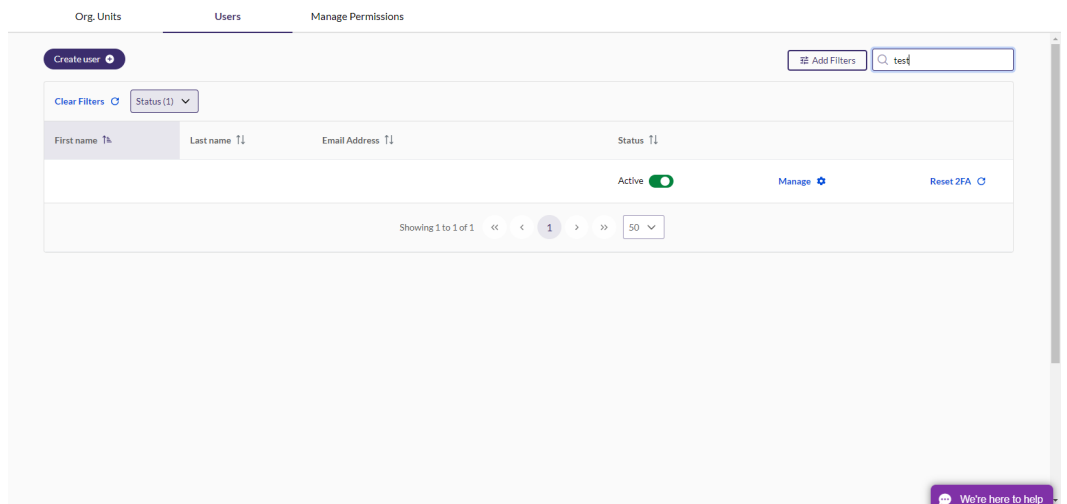
Enter the name, email address, organisation unit and assign the permissions. You can also see a description of the permission using the icon on the left.



If you click “**Manage**”, you will be able to amend the organisation unit, permissions and name of the user.

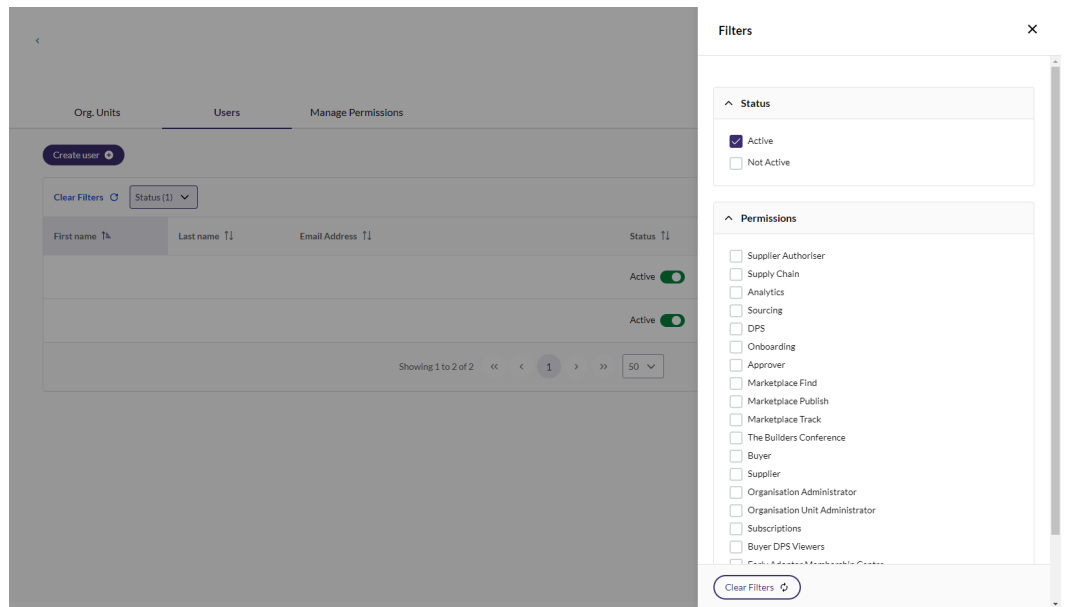


To find a user quickly, use the search bar. The search is fuzzy, meaning if you spell the name incorrectly, it will still appear in the list.



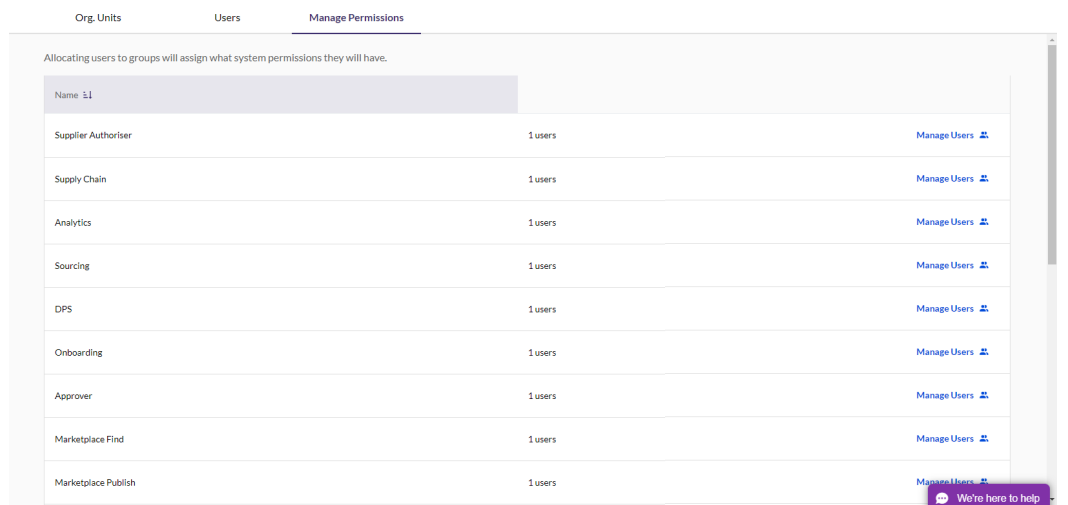
To deactivate a user, click the **“Active”** toggle. This will keep the user in your list of users, but stop them from logging in. The user can be reactivated by clicking the toggle again.

Click **“Add Filters”** to filter the list of users to show only those active or not, and users that have specific permissions.



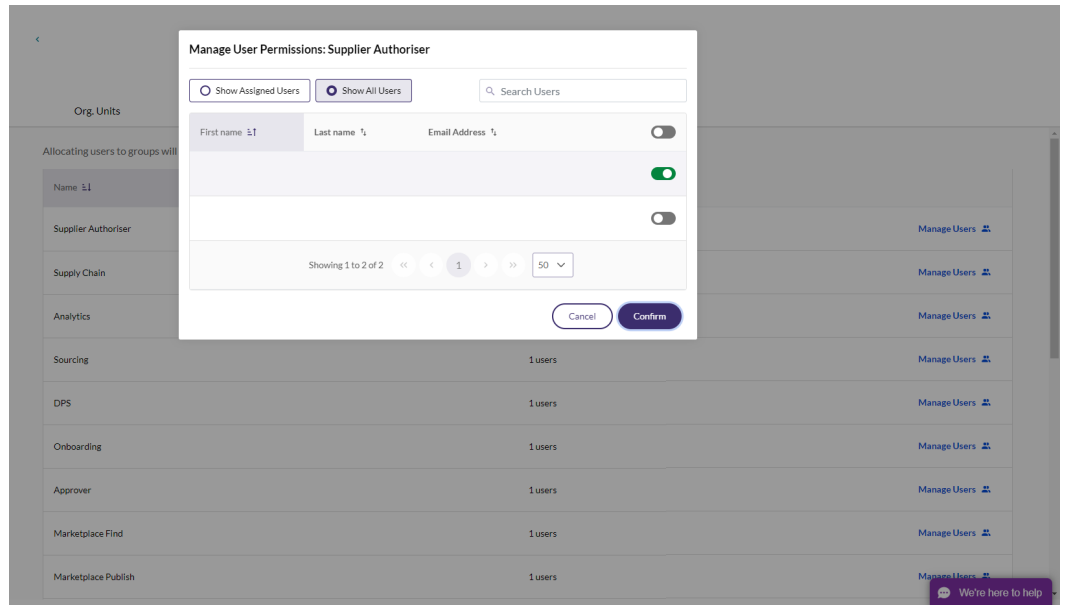
Manage Permissions

To manage your users and amend permissions, click “**Manage Permissions**”.



Click “**Manage Users**”, to add or remove users from the permissions group.

You can also search for a user to find a specific user quickly.



Still feeling stuck?

You can contact us via:

Telephone: **0333 300 3066**

Email: **support@constructionline.co.uk**

Live Chat on the portal: 