# Managing user profiles on zDirect

Account

An introduction to the types of users on zDirect and how to manage these profiles.

Contents:

- 1. Internal and External users
- 2. Principal and Connected users
- 3. Types of roles found on zDirect
- 4. Viewing existing users in your account
- 5. Adding a user to your account
- 6. Editing a user's details
- 7. Resetting a user's password
- 8. Managing access for users
- 9. Best practice advice
- 10. Need some help?

## Internal and External users

Internal users belong to your organization and should be created in your organization's zDirect account first.

External users belong to **third party service providers** - e.g. from Technical Service Providers such as Tradebyte and ChannelAdvisor. You invite them to manage your operations on zDirect on your behalf.

Before you can invite them to your account, they must already have access to zDirect which will have been set up by their organization.

#### Principal and Connected users

When users are created in a zDirect account for the first time, they become **Principal users** for this account. They can later be added to other zDirect accounts and will become **Connected users** in those accounts.

If users are disabled by the Administrator of the Principal account, their access to Connected accounts will be disabled as well. But if they are removed from one of their Connected accounts, their Principal and other Connected accounts remain active.

# Types of roles on zDirect

There are three different roles that can be created:

Internal users:

- 1. Administrator: Has full access to all features of zDirect and can add, delete, enable or disable users and change their access rights (eg user roles, access to merchants). They can also perform basic tasks such as password reset.
- 2. Manager: Has full access to all features of zDirect, but cannot manage users (eg add, delete etc.) and their access rights or make changes to the business profile.

# Viewing existing users in your account

1. Click on the **Applications icon** (<sup>**B**</sup>) at the top right corner of the navigation toolbar.

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Hello, John . et's see how your partner program business on alando has been performing during the last 7 da	1)%.	Tous Prov Last 7 D	1 lays ~
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#### 2. Click on Manage Users.

zalando Home Articles Orders Marketing	Sales Advertising Fulfillment	zalando-wormhole-demo   🕐 🔡 🕺
Hello, John . Let's see how your partner program business on Zalando has been performing during the last 7 days.		Business Potte  Rutarage Uses  Time #  Time #
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Categories by Sales way betwee Returns Best Worst  Toroser Pande - Cathog 663,656 4		Categories by Growth Natv Below Returns           Best         Worst           Etail         229.42 %

You'll now be able to see the users in your account under User Management.

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er management				O Add Us	
Name	Email	Role	Merchant	Status	
a Mustermann	erika.mustermann@partner.com	Manager		PENDING	
n Doe	john doe@partner.com	Supervisor		PENDING	

# Adding a user to your account

Only an Administrator can add users to your organization's account.

### Things to bear in mind:

- Only an Administrator can edit the access rights of existing users or add new users
- Don't add an unknown user to your account
- You can delete, revoke access or remove admin rights from users at any time but check our best practices advice below, first.

## Existing users on zDirect

1. Navigate to User Management and click Add User.

<b>bzalando</b> Home Articles Orde	lers Marketing Sales Advertising Fulf	fillment		Example Partner   🕐 😳 🔗
User Management				Add User
Full Name Email	a	Role	Merchant	Status X
John Doe john.d	doe@example.com	Administrator	Example Brand	ACTIVE
			Ro	ws per page: 10 $\vee$ 1-4 $\leftarrow$ $\rightarrow$

2. Enter the email address and click Confirm.

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						Add of Create a no Email addre erika.muz Enter the un Cancel	user to ye w user or invite an termann@partner. sr's email address.	OUT OTGAN n existing one to have .com	ization e access to your accord	unt.	onfirm I User					_	
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If the user already exists in your account, you will see the message: "This user already belongs to your account".

Þ zalando	Home	Articles	Orders	Marketing	Sales	Advertising	Fulfillment		Example Partner	08	8
						Add Create an m john.doe This user a	User to your organization ev user or invite an existing one to have access to your account. Sexample.com Wexample.com	Confirm Add User			Feetback

If the email address corresponds to an existing zDirect user, they will become a Connected user.

This means you will be able to change their role and permissions or revoke their access entirely but you won't be able to modify details such as their name.

zalando Home Articles Orders Marketing Sale	s Advertising Fulfillment	Example Partner   ⑦ 😳
	Add user to your organization	
	Create a new user or invite an existing one to have access to your account.	
	Email address erika.mustermann@partner.com	
	Enter the user's email address.	
	Please provide details	
	n Put nare Erika Mustermann	
	This user's account is managed by another organization. You can't mostly personal information for external users.	
	Role	-
	Merchant Name	
	Cancel Add Use	
		-

3. Allocate their role depending on the permissions you want them to have. Select the role and click Apply.

zalando Home Articles Orders Marketing	Sales Advertising Fulfilment	Example Partner   ⑦ 😳
	Add user to your organization	
	Create a new user or invite an existing one to have access to your account.	
	Enal adexis erika.mustermann@partner.com Edit	
	Enter the user's email address.	
	e Put nore	
	Erika Mustermann This user's account is managed by another organization. You can't modify personal information for external users.	
	Roje V	
	Administrator Has full administrative access to zDirect. Recommended only for trusted users.	
	Manager Has full access to zDirect, but can not create new users or modify the business profile.	
	Supervisor Limited mostly read-only access to 20rect functionalities.	

4. Choose the merchants you want them to have access to. If you have only one merchant in your account, select this merchant and click **Apply**.

zalando Home Articles Orders Marketing Sal	es Advertising Fulfillment	Example Partner   ⑦ 00
	Add user to your organization	
	Create a new user or invite an existing one to have access to your account.	
	Email address erika.mustermann@partner.com	
	Enter the user's email address.	
	Please provide details	
	Ful name	
	This user's account is managed by another organization. You can't modify personal information for external users.	
	User role  Administrator	
	- Number Press	
	Merchanis	
	Example Brand 6895021d-6c18-4987-w341-w79xd13367871	
	Select All Apply	

5. Confirm the information entered is correct and click Add User.

You can revoke permissions for a Connected user at any time. Their zDirect account will continue to exist, but they will no longer have access to your organization's platform account.

# User doesn't exist on zDirect

1. If the email address is unique and doesn't correspond to an existing zDirect account, you will need to confirm if

#### the user belongs to your organization.

zalando Home Articles Orders Marketing Sales	Advertising Fulfillment		Example Partner   (?)
	Add user to your organization		
	Create a new user or invite an existing one to have access to your account.		
	jane.doe@example.com	Edit	
	Dans the user below to your seven to your		
	Yes     No		
	Please provide details		
	Eulinama		
	Enter First Name and Last Name		
	Role	~	
	- Merchant Name		
	Merchants	~	
	Cancel	Add User	

2. If they do, provide their name and then follow the same process as above for choosing their role and the merchants you want them to have access to.

Double check all the information and then click on the Add user button to complete the creation process.

3. If the user doesn't belong to your organization, you will see an **error message**. This user will have to be created in their own organization's account (e.g. third party service provider) first and then added to yours as a Connected user.

▶ zalando Home Articles Orders Marketing Sales A	dvertising Fulfillment		Example Partner   🕐 🖶 🞗
	Add user to your organization Create a new user or invite an existing one to have access to your account. Create address Inter the user's ended address Dependent on your organization? Yes	Edit	E Feetnas
	We couldn't find that email. To create it, please contact the person wh manages accounts at the user's organization. Learn more.	10	
	Cancel	Add User	

4. The new user will receive an email with instructions on how to continue setting up their account.

## Editing a user's details

To edit an existing user, click on their name or hover over it in the far-right column of the **User Management** table. To see the menu choose **Edit Details**.

uli Name	Email	Role	Merchant	Status
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rika Mustermann	erika.mustermann@example.com	Administrator	Example Brand	🖉 Edit Details
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lando Home Artic	les Orders Marketing Sales	Advertising Fulfillment		Example Partner   ⑦ B
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		erika.mustermann@example.com Enter the user's email address.		
		Full name		
		Enter First Name and Last Name		
		Administrator	~	
		(1) Example Brand	~	
		Cancel	Save	
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administrate	#reset-password) fo	or any user account	on zDirect.	F
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		linnation			$\wedge$	
Are you sure that you want to reset the password for <b>Erika Mustermann</b> (Administrator)?						
			Cancel	Reset Pass	word	
/ will receive	an email, including a link	, to update their p	assword. This link h	nas <b>an expiry pe</b>	riod.	
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Revoke access confirmation	×
Are you sure that you want to revoke zDirect access for (Administrator)?	or <b>Erika Mustermann</b>
	Cancel Revoke

# **Delete User**

When users **leave your organization**, we strongly recommend their account and access is removed from zDirect. When you delete a user, you will be asked to confirm this and they will be removed permanently and will get notified via email.

ser managen	ient				🖨 Add Us
ull Name	Email	Role	Merchant	Status	
hn Doe demal	john.doe@example.com	Administrator	Example Brand	ACTIVE	
ika Mustermann	erika.mustermann@example.com	Administrator	Example Brand	ACTIVE	dit Details
				a R	evoke Access

Are you sure that you want to permanently delete Erika Mustermann (Administrator)?	Delete user confirmation	×
Cancel Delete	Are you sure that you want to permanently delete Erika Mustermann (Administrator)?	
	Cancel	Delete

# **Best Practice Advice**

Make sure you have a number of Administrators to handle tasks such as adding/removing users and resetting passwords to avoid issues if people are on vacation or sick leave.