Onboarding & Account Set-Up - One

🧭 ONBOARDING & ACCOUNT SETUP

How to Create and Assign a Business Admin Account

Setting up Business Admins correctly from the start ensures businesses can manage their own content, while giving you full control over access and moderation. Here's a quick walkthrough of the process.

✅ 1. Create the Business Admin User

In the **Users** section of the DCMS, create a new user with the contact's name and email address. Assign them the **Business Admin** role under the Permissions tab.

> ⚠️ ***Recommendation:***
>
> ***Do not tick 'Send activation email now'*** *at this stage. In the early days, we recommend sending activation links manually — this allows you to provide more context and support alongside the activation, helping new users feel more confident.*

Once saved, the system generates an activation link in the background (ready to retrieve manually).

✅ 2. Assign Them to a Business

Go to the **Business Directory**, find the relevant business entry, and navigate to the **Submissions** tab. Use **+ Add a user** to assign the Business Admin.

> *A Business Admin must be assigned to at least one business or they won't be able to log in.*

You can assign:

- Multiple Business Admins to a single business
- One Business Admin to multiple businesses

🔒 3. Retrieve the Activation Link

Once the user is created and assigned, you're ready to send the activation link manually. We'll cover exactly how to do that — including example wording — in the next bite-size guide.