# How to create or update users on the Wedge

## Create New User

1. Log into the Wedge and click on the dropdown by your name in the top right corner.



1. Click on View Account Info.
2. Scroll to the Contacts section and click on the Add Contact button on the right-hand side of the screen.



1. Type in the user’s first and last name.
2. Enter the user’s email address and phone number.
3. Enter any additional information needed.
4. Move on to the Wedge Portal User Information section.
5. The Login Name will be the user’s email address.
6. Check the box next to Portal/Support User.
7. Type in a temporary password, and then repeat in the Confirm Password. An example would be User123.
8. Click the magnifying glass next to Portal User Role and choose what the user’s role will be. Options include Support, Administrator, Training and Base.
9. Fill in any additional information in the Communication Subscriptions and Professional and Personal Interests sections.
10. Click Submit. 
11. Your new user is ready to log into the Wedge using his/her new username and password. Advise the user to reset their password when they get logged in.

##  Update Existing User

1. Log into the Wedge and click on the dropdown by your name in the top right corner.
2. Click on View Account Info.
3. Scroll to the Contacts section and click Edit next to the contact you want to update.
4. Make needed changes, then click Submit.

## Change your own Portal User Role

1. If you are unable to change a user’s password, you may not be an Administrator for the Wedge.
2. To update, click on the dropdown by your name in the top right corner.
3. Click on View Account Info.
4. Scroll to the Contacts section and click Edit next to your contact.
5. Click Edit Contact.
6. Change the Portal User Role to Administrator, then click Submit.

## Review Portal User Roles for Company

DMSi recommends regular cleanup of your contact list to ensure the correct users are creating cases/contacting Support for help.

Portal/Support User is a checkbox that allows your user to have a Wedge login. Portal User Role is used to grant certain access to the Wedge for your users. If your user should be creating cases or calling into Support, they should be flagged as an Administrator or Support for this field.

1. Log into the Wedge and click on the dropdown by your name in the top right corner.
2. Click on View Account Info.
3. Scroll to the Contacts section and look at the ‘Portal/Support User’ and ‘Portal User Role’ columns.
4. If update is needed, click Edit, make needed changes, then click Submit.

