

Add, Delete or Edit User Role

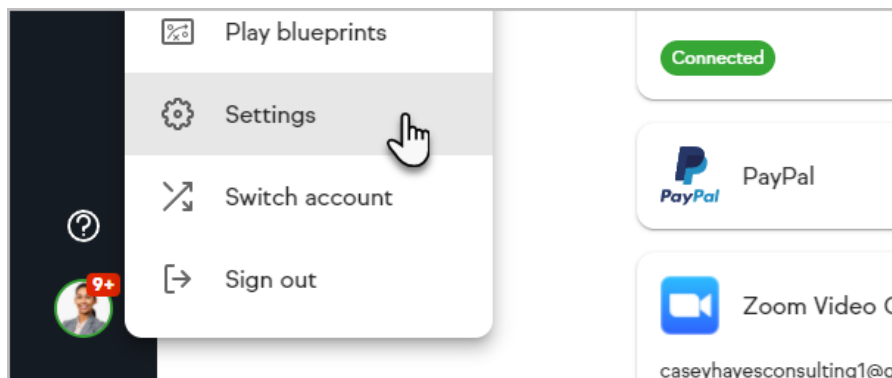
This article applies to:

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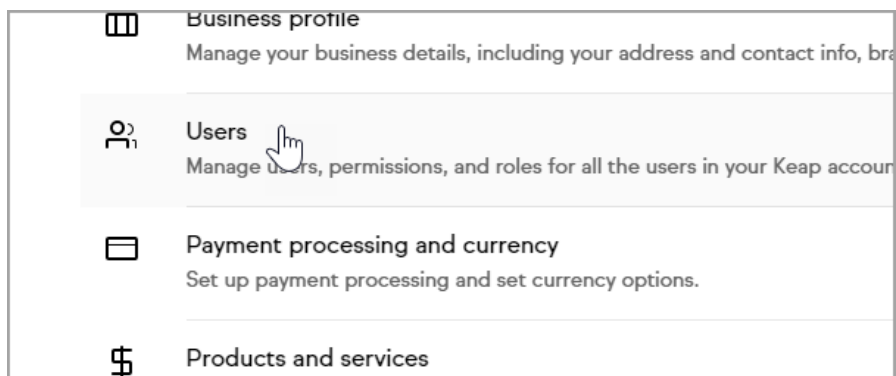
1. [Add a user or a Partner](#)
2. [Delete a User](#)
3. [Edit a user role](#)
4. [Leave an app as a Partner](#)

Add a user or a Partner

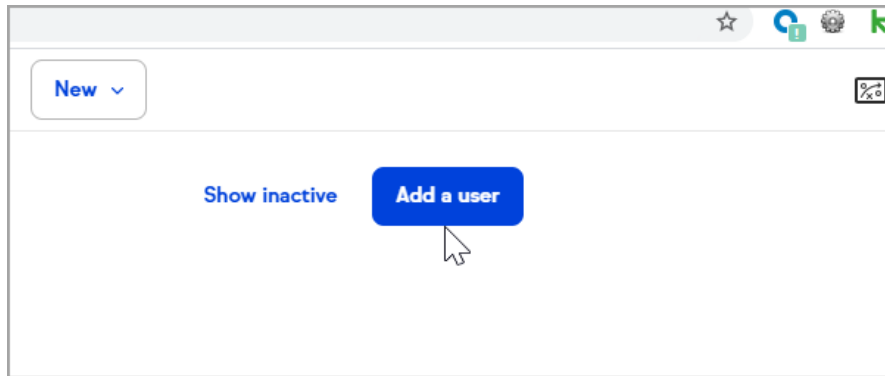
1. Click on your avatar and choose **Settings**



2. Click **Users**.



3. Click **Add a user**.

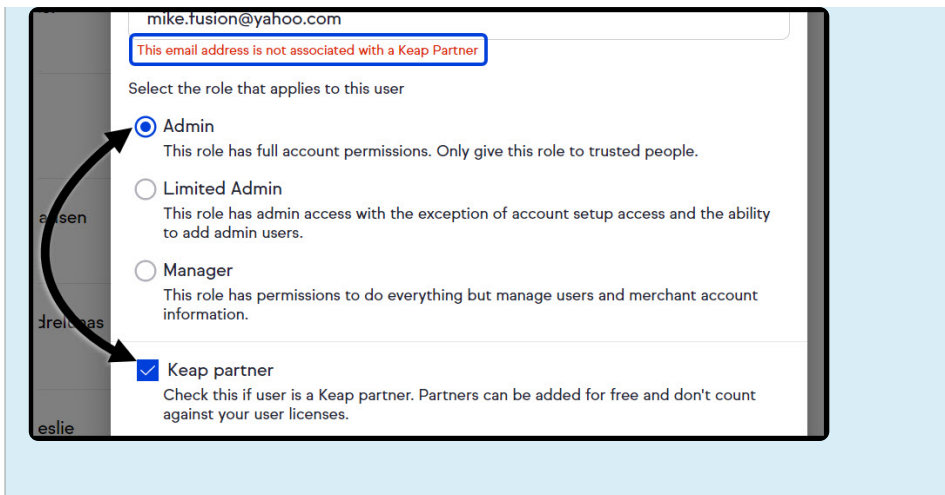


4. Type the name and email of the user or partner to add.

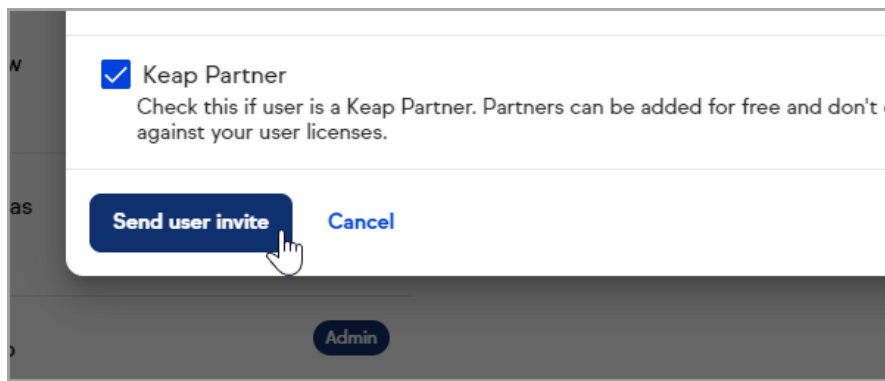
A screenshot of a modal dialog box titled 'Add a new user'. At the top left is a close button (X). Below the title, there is a message: 'You have 6 user licenses remaining. To add more users please contact Keap.' Below this are two input fields: 'First name' and 'Email'. Underneath is a section titled 'Select the role that applies to this user' with four radio button options: 'Admin' (with subtext: 'This role has full account permissions. Only give this role to trusted people.'), 'Limited Admin' (with subtext: 'This role has admin access with the exception of account setup access and the ability to add admin users.'), 'Manager' (with subtext: 'This role has permissions to do everything but manage users and merchant account information.'), and 'Staff' (with subtext: 'This role has limited access, and can only see their own contacts, tasks, and deals.'). Below the radio buttons is a checkbox labeled 'Keap Partner' with subtext: 'Check this if user is a Keap Partner. Partners can be added for free and don't count against your user licenses.' At the bottom of the dialog are two buttons: 'Send user invite' and 'Cancel'.

5. Select the [user role](#) for the new user. Find permissions details below each role.

Note: For Keap Partners, check the Keap partner box. Also, select the radio button for the role. Partner emails are validated to make sure they are a Keap Certified Partner.



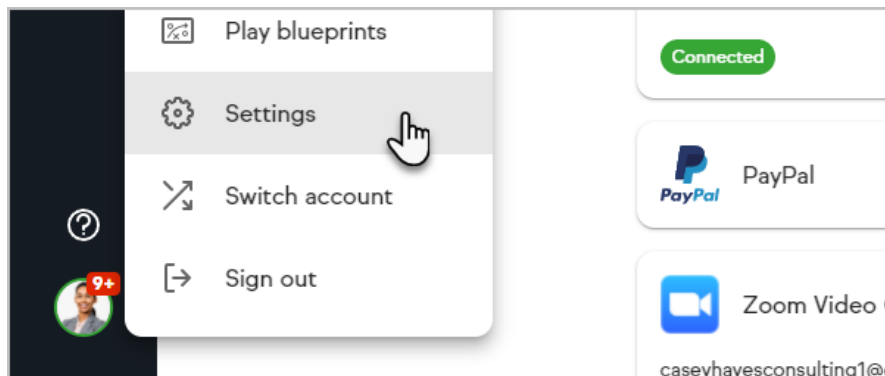
6. Click **Send user Invite**. This will send an email to the user inviting them to create a login for the Keap App.



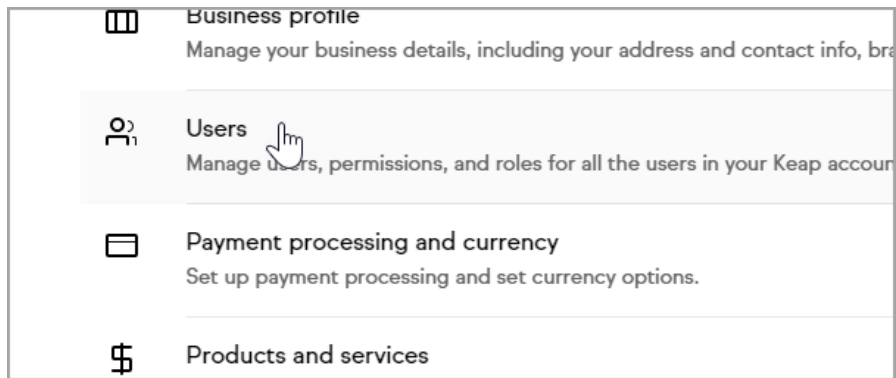
Delete a User

To delete a user from Keap, you will deactivate their account. **Note:** You must be an Admin in order to deactivate an account.

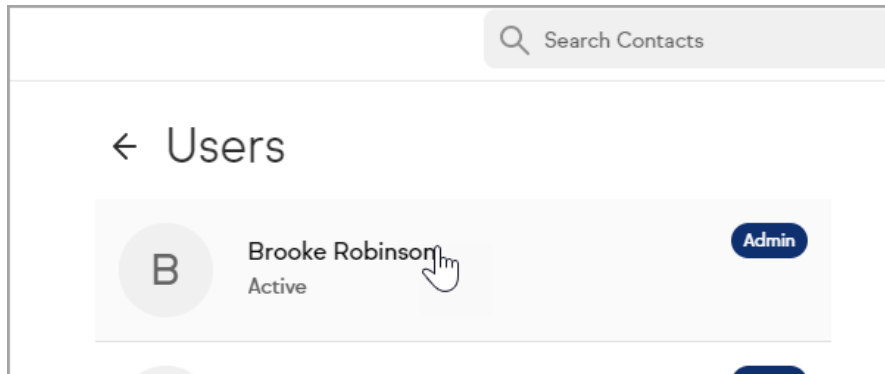
1. Click on your user avatar and choose **Settings**



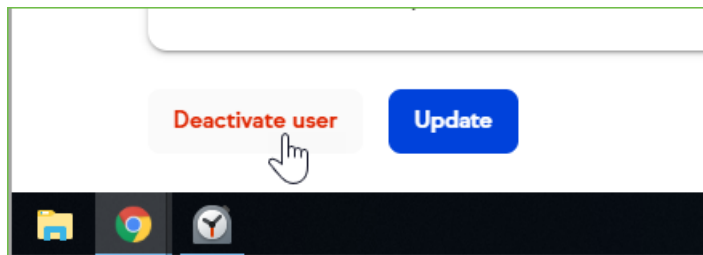
2. Click **Users**.



3. Click on the name of the user.



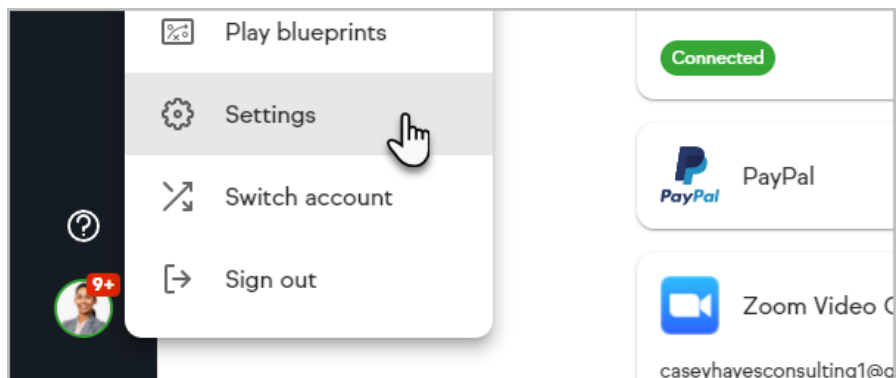
4. Scroll down and click **Deactivate user**.



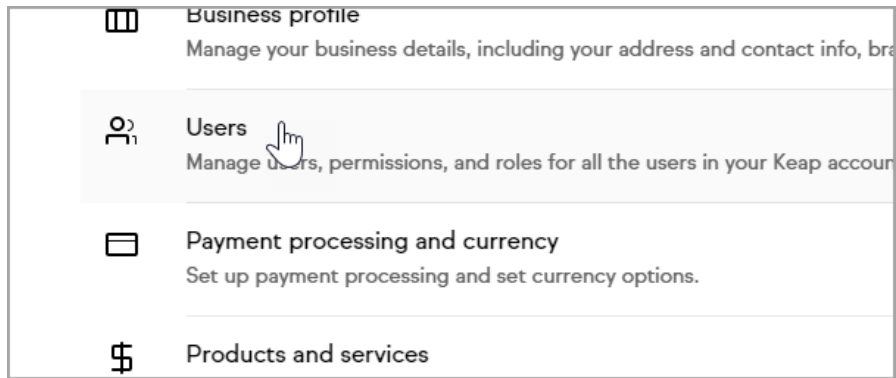
5. Click **Deactivate user** in the popup to confirm.

Edit a user role

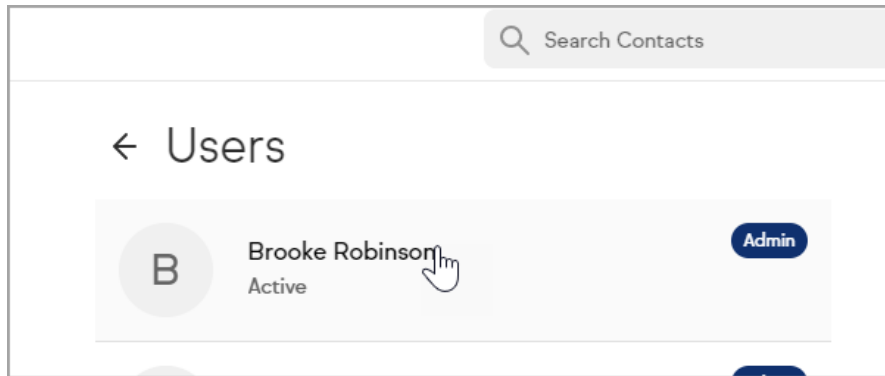
1. Click on your user avatar and choose **Settings**



2. Click **Users**



3. Click on the name of the user



4. If you would like to update your User's Role by granting the user more or less user access you can do this after the user has been added to your list. Go down to the **Role** section and click on the **Role** drop down menu to change the user's current role. Then **Save** changes.

Leave an app as a Partner

In order to leave an app as a Partner, you must first ensure that you do not have any assigned contacts in the app. Attempting to leave an app with assigned contacts will result in an error.

1. Navigate to [Account Central](#)
2. Locate the app you would like to leave.
3. Click **Configure** next to that app



4. Click **Leave Account**.

The screenshot shows a user interface for managing account connections. At the top left is a green 'k' logo. To its right are two fields: 'Account Label' with a dropdown menu showing 'My Account' and a downward arrow, and 'Account Name' with a text box containing 'gx624 Keap Pro Recording'. Below these fields is the heading 'Connected Apps'. At the bottom of the interface, there is a blue 'Save' button and a blue 'Leave Account' link. A mouse cursor is pointing at the 'Leave Account' link. The footer of the interface displays the URL 'ky667.infusionsoft.com'.

5. Confirm your decision to leave the app and no longer have access.

This screenshot is similar to the previous one, showing the same account information and 'Connected Apps' section. However, the 'Leave Account' link has been replaced by a blue 'Confirm' button and a blue 'Cancel' link. A mouse cursor is now pointing at the 'Confirm' button. The 'Save' button remains on the left. The footer still shows 'ky667.infusionsoft.com'.

6. The app will be removed from your Account Central.