

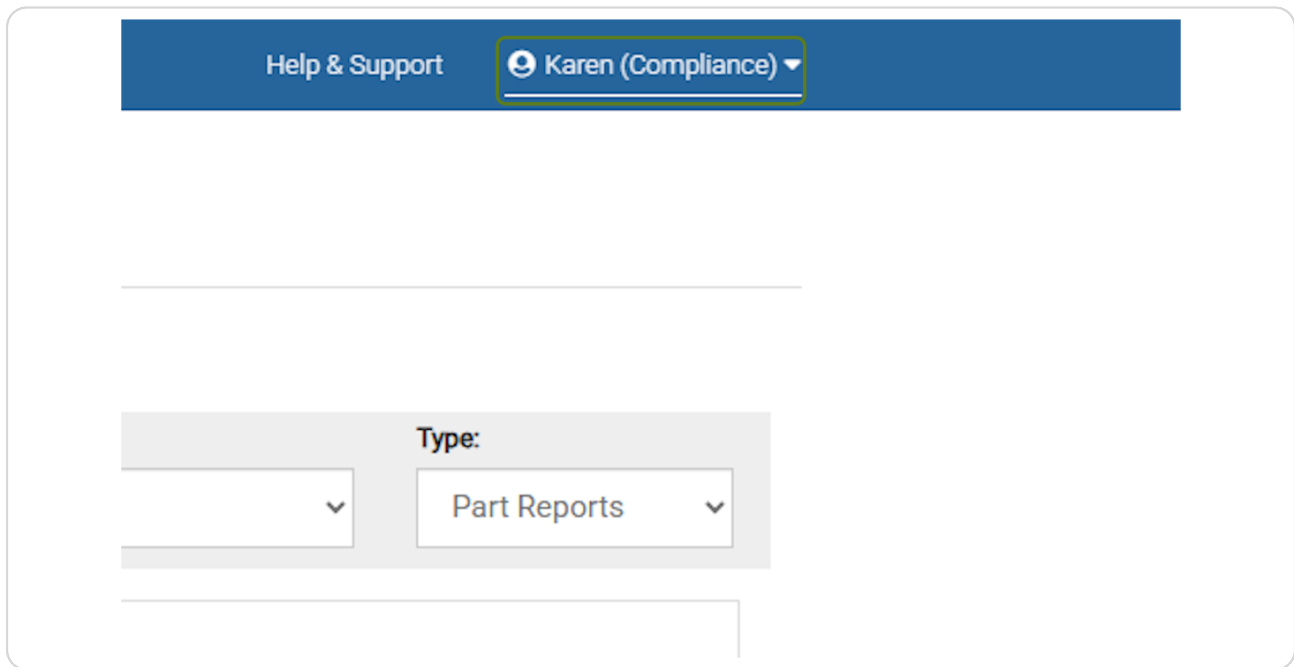
Create New User in SpendLogic

18 Steps [View most recent version](#) 

Created by	Creation Date	Last Updated
Karen Stein (SpendLogic)	Apr 11, 2025	Apr 11, 2025

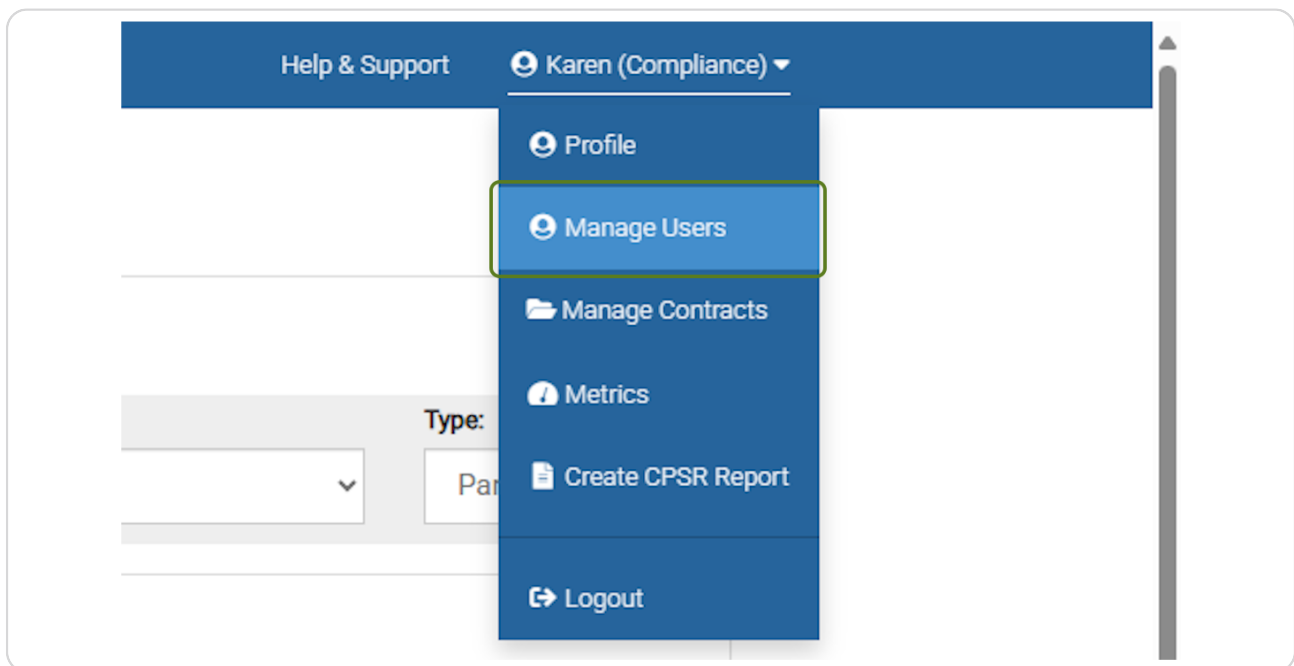
STEP 1

Click on your Profile



STEP 2

Click on Manage Users



STEP 3

Click on New

The screenshot shows a user management interface. At the top, there is a blue header bar with 'Help & Support' and a user profile 'Karen (Compliance)'. Below the header, a '+ New' button is highlighted with a green box. Underneath the button is a search bar with the placeholder text 'search'. Below the search bar is a table with columns: 'Active', 'Created', and 'Actions'. The table contains two rows of data, each with an 'x' in the 'Active' column, a date in the 'Created' column, and edit/delete icons in the 'Actions' column.

Active	Created	Actions
x	Apr 20 2023	
x	Aug 04 2023	

STEP 4

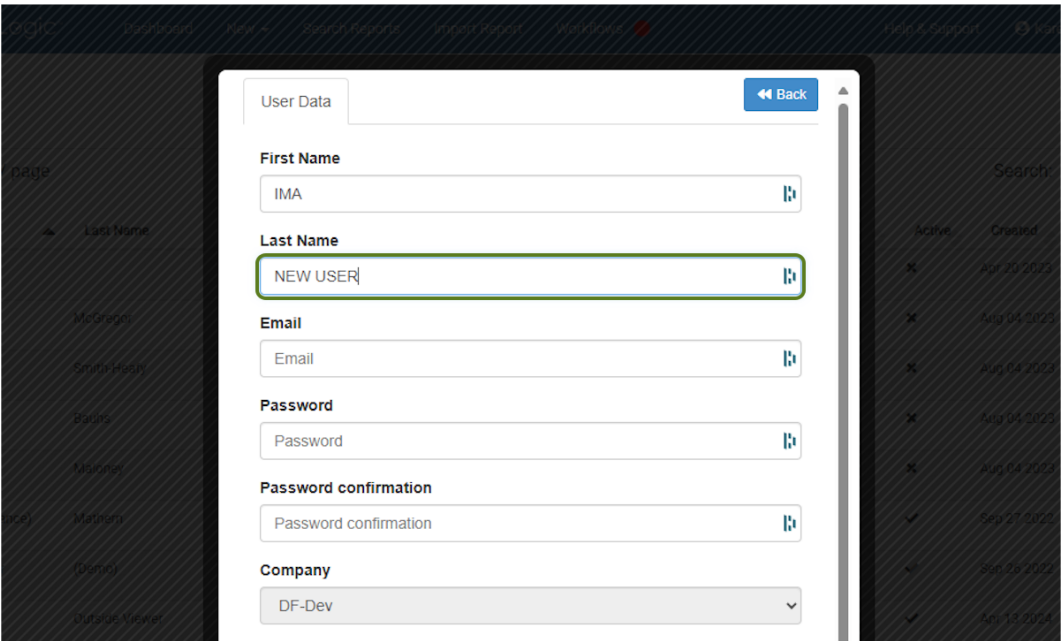
Enter the new user's First Name

The screenshot shows a user creation form. The form is titled 'User Data' and has a 'Back' button. The form contains several fields: 'First Name', 'Last Name', 'Email', 'Password', 'Password confirmation', and 'Company'. The 'First Name' field is highlighted with a green box. The 'Company' field is a dropdown menu with 'DF-Dev' selected. The form is displayed over a background showing a list of users.

First Name	Last Name	Email	Password	Password confirmation	Company
	Last Name	Email	Password	Password confirmation	DF-Dev

STEP 5

Enter the new user's Last Name



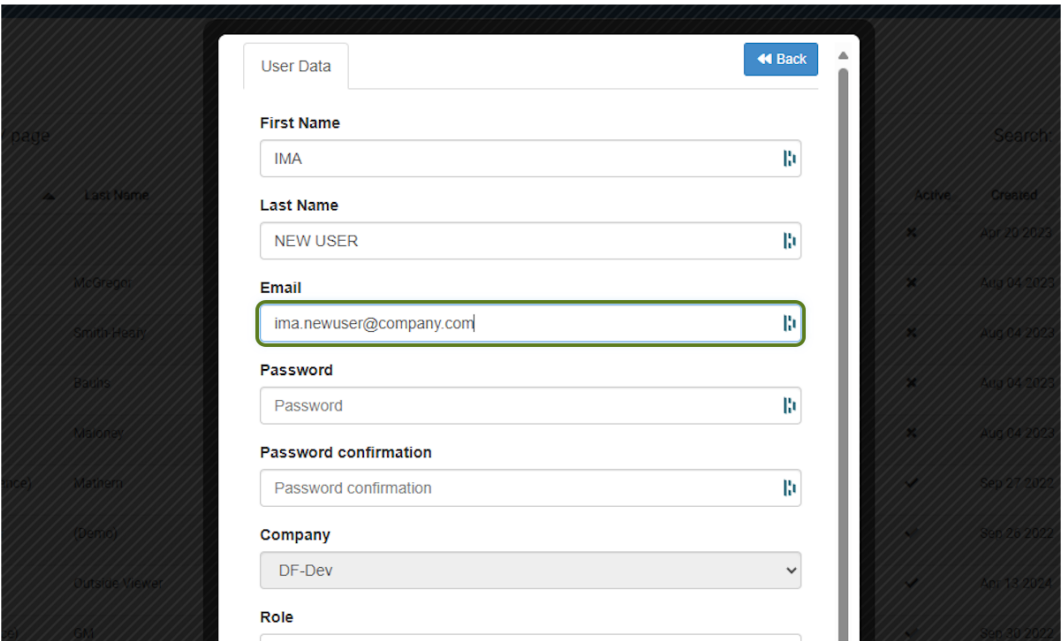
The screenshot shows a 'User Data' form with the following fields:

- First Name:** IMA
- Last Name:** NEW USER (highlighted with a green border)
- Email:** Email
- Password:** Password
- Password confirmation:** Password confirmation
- Company:** DF-Dev

A 'Back' button is located at the top right of the form. The background shows a list of users with columns for Name, Last Name, Email, Active, and Created.

STEP 6

Enter the User's email address



The screenshot shows the same 'User Data' form as in Step 5, but with the 'Email' field highlighted with a green border and containing the text 'ima.newuser@company.com'. The 'Last Name' field now contains 'NEW USER'.

The background shows the same list of users with columns for Name, Last Name, Email, Active, and Created.

STEP 7

Enter no less than 8 digits in the password field.

NOTE: This password is not necessary to log into SpendLogic if your company is set up with Single Sign On (SSO) functionality. It is simply to meet the requirement for setup.

The screenshot displays the user creation interface in SpendLogic. The central form contains the following fields:

- First Name:** IMA
- Last Name:** NEW USER
- Email:** ima.newuser@company.com
- Password:** Masked with dots (.....)
- Password confirmation:** Password confirmation
- Company:** DF-Dev (selected from a dropdown)
- Role:** Nothing selected (selected from a dropdown)
- Programs:** (empty list)

On the left sidebar, a list of users is visible, including entries like 'IMA', 'NEW USER', and others. On the right sidebar, a table shows the status of various users, with columns for 'Active' and 'Created'.

STEP 8

Re-enter the password

Last Name

NEW USER

Email

ima.newuser@company.com

Password

Password confirmation

Company

DF-Dev

Role

Nothing selected

Programs

Select Programs...

Delegation

Active

Created

X

Apr 20 2023

X

Aug 04 2023

X

Aug 04 2023

X

Aug 04 2023

X

Aug 04 2023

✓

Sep 27 2022

✓

Sep 26 2022

✓

Apr 13 2024

✓

Sep 20 2022

✓

Feb 02 2024

✓

Sep 20 2022

✓

Feb 01 2023

STEP 9

Company will default to your Company

NEW USER

Email
ima.newuser@company.com

Password

Password confirmation

Company
DF-Dev

Role
Nothing selected

Programs
Select Programs...

Delegation
Choose one

Reset password on next login

STEP 10

Role

Select the Role for the new user. To view the different roles with accessibilities, visit [SpendFile User Roles Defined – SpendLogic](#)

Role

User

- User ✓
- Company Admin
- Internal Workflow
- FP Outside Viewer
- Compliance
- Manager

STEP 11

NEW HIRE OPTION

If your company assigns new buyers/SCAs with a probationary Review Waiver (a/k/a Signature Threshold/Delegation of Authority/Signature Authority), select New Hire and enter the amount of the probationary threshold and an end date (60 days/90 days, etc.)

ins

oney

them

mo)

Side Viewer

Company

DF-Dev

Role

User

New hire:

☒

Temporary review waiver value:

1,000

Expires:

Expires

Manager

Select a manager

Review Waiver

Review Waiver

Fast Track

STEP 12

Select your Manager

All Users must have an assigned Manager.

For other roles, an assigned Manager is Optional or not applicable.

NOTE: A Manager must be set up in your system BEFORE being assigned to a User.

The screenshot shows a user profile configuration window. The 'Manager' field is highlighted with a green border and contains the text '(Demo) Demo Manager'. Other fields include 'Company' (DF-Dev), 'Role' (User), 'New hire' (checked), 'Temporary review waiver value' (\$1,000.00), 'Expires' (04/30/2025), 'Review Waiver' (Review Waiver), 'Fast Track' (Choose one), and 'Programs' (empty). The background shows a list of users with columns for name, email, and status.

Name	Email	Status
Shirley Hahn	shirley.hahn@spendlogic.com	✓
Barbara	barbara@spendlogic.com	✗
Melanie	melanie@spendlogic.com	✗
(Demo) Matrena	matrena@spendlogic.com	✓
(Demo)		✗
Outside Viewer		✓
GM		✗
GM		✗
GM		✓
2nd Compliance Lead		✗
Tyler		✗
Tyler		✗
grandduchess	grandduchess@spendlogic.com	✓
DF-Dev		✗
TP Viewer		✓

STEP 13

Enter Review Waiver Amount

This is the Signature Threshold/Delegation of Authority/Signature Authority you have delegated to the User/Manager/Compliance and align with your company's policies and procedures.

If this is a New Hire with a probationary threshold, the amount you enter here is the amount the new hire will be authorized to obligate at the end of their probationary period.

The screenshot displays the 'Enter Review Waiver Amount' form in the SpendLogic system. The form is set for a new hire with a temporary review waiver. The 'Review Waiver' field is highlighted with a green border and contains the value '1000'. The 'Expires' date is set to 04/30/2025. The 'Manager' is set to '(Demo) Demo Manager'. The 'Fast Track' option is set to 'Choose one'. The 'Programs' section is currently empty. The sidebar on the left lists various roles, and the sidebar on the right shows a list of users with their status and dates.

Company	Role	New hire:	Temporary review waiver value:	Expires:	Manager	Review Waiver	Fast Track	Programs
DF-Dev	User	<input checked="" type="checkbox"/>	\$1,000.00	04/30/2025	(Demo) Demo Manager	1000	Choose one	

STEP 14

Fast Track

Unless your company is set up for Fast Track, this will not appear.

NOTE: Most companies do not have this set up.

The screenshot shows a user profile form with the following fields and values:

- Company:** DF-Dev
- Role:** User
- New hire:** ☒
- Temporary review waiver value:** \$1,000.00
- Expires:** 04/30/2025
- Manager:** (Demo) Demo Manager
- Review Waiver:** 10000
- Fast Track:** Choose one (highlighted with a green border)
- Programs:** (empty list)

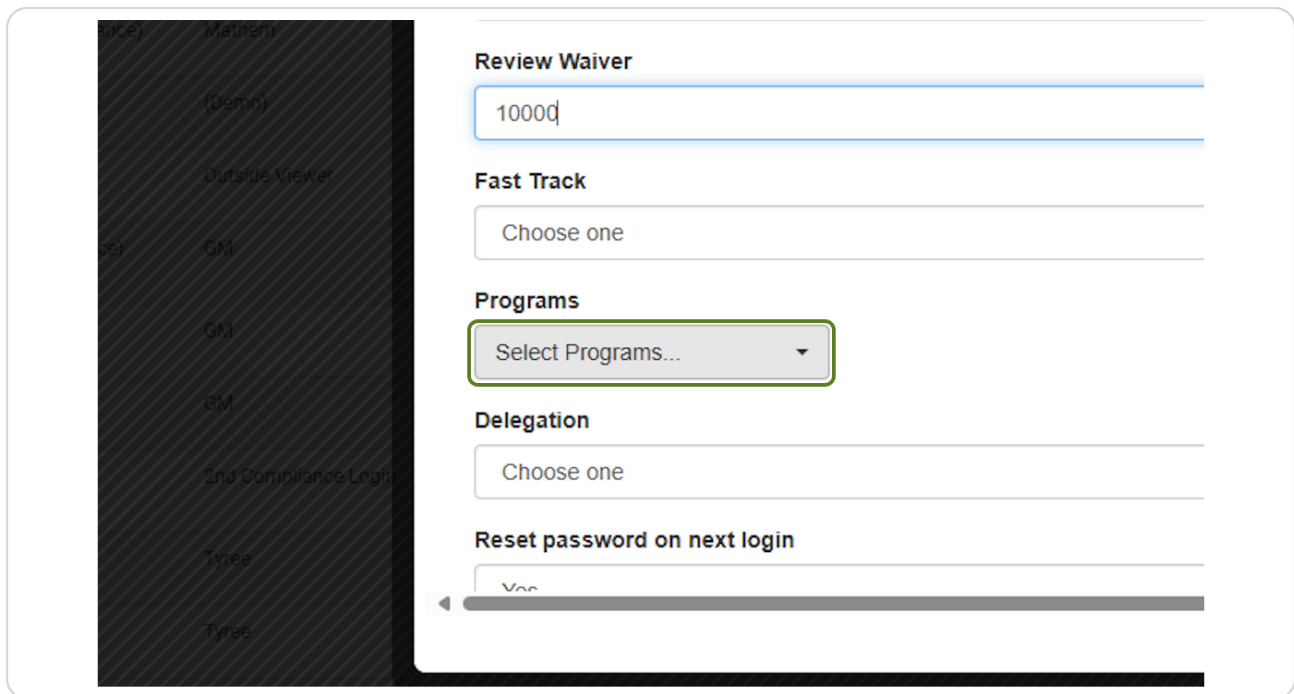
The form is displayed over a background of a user directory table. The table has columns for a user icon, name, and date. The visible rows in the background are:

Icon	Name	Date
✕	Aug 04 2023	
✕	Aug 04 2023	
✓	Sep 27 2022	
✓	Sep 28 2022	
✓	Apr 13 2024	
✓	Sep 20 2022	
✓	Feb 02 2024	
✓	Sep 20 2022	
✓	Feb 01 2023	
✕	Aug 04 2023	
✕	Aug 04 2023	
✓	Jan 22 2023	

STEP 15

Select the Program (most will have only one)

If your company has more than one Program, you'll select the Program(s) the new user will be supporting. Most companies will have only one Program.



The screenshot shows a user setup interface. On the left is a dark sidebar with a list of items: (nce), Mathem, (Demo), Outside Viewer, (e), GM, GM, GM, 2nd Compliance Logi, Tyree, and Tyree. The main content area on the right contains the following sections:

- Review Waiver**: A text input field containing the value "1000d".
- Fast Track**: A dropdown menu with the text "Choose one".
- Programs**: A dropdown menu with the text "Select Programs..." and a downward arrow. This section is highlighted with a green border.
- Delegation**: A dropdown menu with the text "Choose one".
- Reset password on next login**: A dropdown menu with the text "Yes".

STEP 16

Click on Reset password on next login

You can leave this as Yes. Your company is likely set up with SSO and this field does not affect the setup.

\$10,000.00

Fast Track

Choose one

Programs

SL

Delegation

Choose one

Reset password on next login

Yes

Activate user

Yes

Cancel Reset Create

Name	Email	Status
John Doe	john.doe@company.com	Active
Jane Smith	jane.smith@company.com	Active
Bob Johnson	bob.johnson@company.com	Active
Alice Brown	alice.brown@company.com	Active
Charlie Davis	charlie.davis@company.com	Active
Diana Prince	diana.prince@company.com	Active
Frank Miller	frank.miller@company.com	Active
Grace Wilson	grace.wilson@company.com	Active
Henry Taylor	henry.taylor@company.com	Active
Ivy Clark	ivy.clark@company.com	Active
Jack White	jack.white@company.com	Active
Karen Green	karen.green@company.com	Active
Leo Black	leo.black@company.com	Active
Mia Grey	mia.grey@company.com	Active
Noah Blue	noah.blue@company.com	Active
Olivia Red	olivia.red@company.com	Active
Peter Yellow	peter.yellow@company.com	Active
Quinn Purple	quinn.purple@company.com	Active
Rachel Silver	rachel.silver@company.com	Active
Sam Gold	sam.gold@company.com	Active
Tina Bronze	tina.bronze@company.com	Active
Uma Copper	uma.copper@company.com	Active
Victor Iron	victor.iron@company.com	Active
Wendy Steel	wendy.steel@company.com	Active
Xavier Aluminum	xavier.aluminum@company.com	Active
Yara Zinc	yara.zinc@company.com	Active
Zoe Nickel	zoe.nickel@company.com	Active

STEP 17

Click on Activate user

This will default to YES.

\$10,000.00

Fast Track

Choose one

Programs

SL

Delegation

Choose one

Reset password on next login

Yes

Activate user

Yes

Cancel Reset Create

Status	Name	Email	Date
X	Aug 04 2023		
X	Aug 04 2023		
✓	Sep 27 2023		
✓	Sep 29 2023		
✓	Jan 13 2024		
✓	Sep 30 2023		
✓	Feb 02 2024		
✓	Sep 30 2023		
✓	Feb 01 2023		
X	Aug 04 2023		
X	Aug 04 2023		
✓	Jan 13 2024		

STEP 18

Click on Create

The screenshot shows a 'Create' dialog box in the foreground. It contains two empty text input fields and a green 'Create' button with a checkmark icon. A close button (X) is in the bottom right corner. The background shows a dark sidebar with a list of dates and a status column.

 TA DA! You have created a new user in SpendLogic. Congratulations!

SpendLogic