

Add a MAX Administrator

When to use: When you need to add a new administrator to a sub-client in MAX

Navigate to the Client Administrators Screen for a MAX Sub-Client

- 1) In the **CLIENT** tab, click **“Manage Client”**
- 2) Click the name of the sub-client for which you wish to add a new administrator
- 3) Click **“Add/Edit”** in the **CLIENT ADMINISTRATORS** section of the **Client Snapshot** screen

Add a New Administrator

- 1) Click **“Add New Administrator”** in the **ADMINISTRATOR INFORMATION** section of the **Client Administrators** screen
- 2) Enter the administrator’s contact information in the **Add a New Client Administrator** screen. All fields marked with a red asterisk are required
- 3) Select **“Yes”** or **“No”** for each option below the contact-information fields
 - a. The **Active** option allows you to specify the administrator as active or inactive. Inactive administrators will not have access to MAX. Use this option only to temporarily suspend access for security purposes, not for removing administrators.
 - b. The **Setup Sub Admins** option specifies whether the new administrator can add additional administrators below the current sub-client level
 - c. The **Buy** option sets permission to buy pool quantities for the current sub-client
- 4) Click **“Save”** to add the new administrator

Review the New Administrator’s Information for Accuracy

- 1) Click the administrator’s name to navigate to the **Edit Client Administrators** screen
- 2) In the **ADMINISTRATOR INFORMATION** section of the **Edit Client Administrators** screen, review the personal information and permissions set for each of the four options listed above
- 3) Click **“Edit Individual”** to make any necessary changes