M2 & MIRRORTALK

Admin portal training guide: Adding and managing your team members

Add your team to M2. Don't worry—adding users is easier than you think, and you'll feel like a pro in just a few minutes.

What you'll learn

- How to add new users to your M2 organization
- How to assign the right roles to team members
- How to check that everyone was added correctly

Step-by-step: Add your team members

1. **Find user management**
   - From your Admin Dashboard, look for the User Management section.
   - You'll see a list of current users (probably just you right now!).
   - Go back to main dashboard
2. **Get ready to add users**
   - Click the Plus icon under the Members bar.
   - Click Download Template.
   - This gives you a simple form to fill out with your team's information.
3. **Fill out your team list**
   - Open the downloaded file on your computer.
   - Add each person's information:
Email: Their work email address
Name: First and last name
   - Save the file when you're done.
   - Download as CSV
4. **Upload your team**
   - Back in the Admin Portal, click Upload CSV File.
   - Select your completed file.
   - Click Upload.
   - Watch as your team members appear in the User Management section!

Quick check

1. **Do you see your team members listed?**
   - Each person should show up with their name, email, and role.
2. **Is the plan type correct?**
   - Free, Pro (MirrorTalk only), or M2 (can use M2 hardware).

Need more help?

- CSV file not working? Check that all email addresses are complete and spelled correctly.
- Can't find the Upload button? Look for a small icon that looks like a document with an arrow.