User Management

Overview

User management in Alchemer Voice lets an administrator add teammates to your account, assign each person one or more roles, and control what they can see and do. This article covers how to add users, what each role can do, and a few best practices for keeping your account organized and secure.

Add and manage users

Add people to your Alchemer Voice account one at a time from the Admin section.

Invite a new user

1. In the left navigation, select **Admin**, then the **Team** tab.
2. Select **Invite team member**.
3. Enter the person's name and email address.
4. Check the **User roles** you want to grant. Viewer is checked by default.
5. Select **Invite**.

The person receives an email with a link to join. People who have not accepted yet show **Invite not accepted** in the team list. If **Invite team member** is greyed out, your plan is not active. Contact Alchemer Support in that case.

To resend an invite, open the three-dot menu on the person's row and select **Resend invite**. This option only appears for people who have not accepted.

Edit a user

Select the person's name, or use the three-dot menu and choose **Edit user**. On their profile page you can:

- Change the name and profile photo. The email cannot be changed.
- Select **Reset password** to email the person a reset link.
- Set the **Job Domain** (for example sales, success, or support). Alchemer Voice uses it to group activity and insights by role, including in the Usage activity report.
- Change roles.
- Review the groups the person belongs to. Each name links to the group. To change membership, edit the group.

Remove a user

Select **Remove user** in the three-dot menu on the person's row, or **Remove from team** on their profile. The person can no longer log in to your workspace and is taken out of all groups. You cannot remove yourself.

User roles

Each user can be assigned one or more roles that determine what they can do in Alchemer Voice. Viewer is checked by default when you add someone; add Creator and/or Admin as needed, and combine roles for users who need more than one level of access. For the full permission list and custom roles, see Roles and permissions. To limit what people can see to their own team, see Groups.

- **Admin.** Can manage team members, set permissions, and connect integrations. Keep the number of admins limited, because this role is intended for superusers and broad access increases the chance of accidental changes. The Admin role does not include Viewer or Creator permissions, so admins are normally given those roles too.
- **Creator.** Can manage conversations, labels, topics, workflows, and insights.
- **Viewer.** Can read conversations, labels, topics, and insights. This is the default role assigned to every new user.

You cannot change your own roles. This prevents anyone from removing their own admin access by mistake. Another admin can change it for you.

Permissions at a glance

The table below summarizes what each role allows. Roles are not exclusive: a user can hold more than one at a time.

Role	Can do
Admin	Manage team members, set permissions, and connect integrations
Creator	Manage conversations, labels, topics, workflows, and insights
Viewer (default)	Read conversations, labels, topics, and insights

Best practices

- Assign the Creator and Admin roles only when a user actually needs that level of access. Too many admins increases the risk of accidental changes.
- Your Alchemer Voice plan includes a set number of Creator seats. To add more, contact your Alchemer account representative.
- Tag your Solutions Consultants specifically using Labels. These users provide valuable feedback for product and commercial analysis.
- Change a user's roles at any time by selecting **Edit user** for them in Admin > Team as responsibilities shift.

Tips

- Use clear display names so roles are easy to identify, especially for team-based reporting.
- Review your user list regularly and remove users who no longer need access.
- To see how your team uses Alchemer Voice over time, check the Usage activity report (Admin > Activity).

Permissions

Access to the Team tab is controlled by permissions. The **Manage team members** permission is needed to invite, edit, and remove people, and the built-in Admin role has it. Without it, the Team tab is not shown.

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