

People

Manage users, roles, and permissions so the right people have access to the right information.

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Create or edit a user

The **Create a User** and **Edit a User** features allow an admin to add or edit new users to the system and define their access and responsibilities.

How to create a user

1. Navigate to the **People** link in the header.
 2. Click the **Create a User** button.
 3. Fill in the required information.
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Required information

When creating a user, the following details are requested:

1. **First Name** – the user's given name.
 2. **Last Name** – the user's family name.
 3. **Email Address** – used for login and communication.
 4. **Security Role** – defines the user's level of access within the platform. See the [User permissions](#) section for details.
 5. **Groups** – assign the user to one or more groups.
 - Currently, there is only one group: **Body Corporate Committee**.
 - If this box is checked, the user will appear in the **Committee Members** list.
 6. **Units** – assign the user to **any number of units**:
 - The user may **not be linked** to any unit,
 - **Linked to a single unit**, or
 - **Linked to multiple units**.
 - The user can be assigned to existing units or an admin user can create a new one during the process.
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What happens next

- After the user is created, an **automatic email** is sent to them.
- This email allows the new user to **finalise their account creation**, set a password, and access the platform.

Key points

- Security roles control what the user **can see and do**.
- Groups help manage user's responsibilities.
- Linking users to units allows them to view **unit-specific contributions**.
- Admins can **edit or remove users** later if needed.

Manage committee members

Users who are added to the **Body Corporate Committee** group will automatically appear on the **Committee Members** page.

Commonview

People

All usersCommittee membersBody corporateExternal users

+ Create a user

Search...

Name ^	Role	Unit(s)	Email	Actions
Mark Woodland	admin	100, 101	mark.woodland@axistwelve.com	 
Nancy Parker	default	206	nancy@yahoo.com	 

This page provides a central list of all committee members, making it easy to view and manage their details.

Key points

- Only users assigned to the **Body Corporate Committee** group appear on this page.
- Adding or removing a user from the group **updates their committee membership automatically**.
- Adding a user to the group can be done from the [edit a user](#) side panel

Boby corporate

The **Body Corporate** page lists all users who are linked to at least one unit.

By definition, any **unit owner** is considered a member of the body corporate, so this page provides a complete overview of all owners within the building.

Key points

- Only users **assigned to one or more units** appear on this page.
- This page allows you to see a **full list of owners**, their contact details, and the units they are linked to.

External users

The **External Users** page lists all users who are **not linked to any unit**.

These users typically need access to the maintenance plan or other parts of the system **without being a member of the body corporate**.

How it works

- Admin users can **create external users** and assign them appropriate **security roles**, such as **read-only access**.
 - These users will not appear on the **Body Corporate** page, since they are not associated with any units.
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Examples of external users

External users might include:

- **Building surveyors** – need to see scheduled maintenance tasks and timing to perform inspections or works.
 - **Contractors or service providers** – need read-only access to plan works or review completed maintenance.
 - **Property managers or consultants** – monitor maintenance planning, budgeting, and reporting without being an owner.
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Key points

- External users are **not owners** and do not appear in the body corporate list.
- Their access is controlled via **security roles**, which define what they can view or edit.
- This allows organisations to provide **restricted, targeted access** to third parties while keeping the main body corporate data secure.

User permissions

The **Security Role** assigned to a user determines their **level of access** within the platform. There are **three levels of access**, each designed to meet the needs of different types of users.

1. Default

- **Access Level:** Read-only
 - **Pages Accessible:**
 - [Tasks & Costs](#)
 - **Cash & Contributions** ([Cashflow](#), [Contributions](#))
 - **Typical Users:** Standard body corporate members (unit owners)
 - **Purpose:** Allows owners to view their contributions and the maintenance plan without making changes.
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2. Admin

- **Access Level:** Full access
 - **Pages Accessible:** All pages, including:
 - Tasks & Costs
 - Cash & Contributions
 - Approvals
 - Building
 - Units
 - People
 - Documents
 - Settings
 - **Typical Users:** Building managers or committee members responsible for updating the plan and managing settings
 - **Purpose:** Allows users to **create, edit, and delete** data, as well as manage other users and system settings.
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3. Viewer

- **Access Level:** View-only
 - **Pages Accessible:** All pages
 - **Typical Users:** External consultants, surveyors, or service providers
 - **Purpose:** Allows users to **monitor and review** all information without the ability to make any changes.
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Key points

- Security roles ensure that users have **access appropriate to their responsibilities**.
- Roles can be assigned when creating a user or updated later via the [Edit User](#) side panel.
- Using these roles helps maintain **data integrity** while allowing transparency for all stakeholders.