User Management: Invite, Roles, Remove Users

Admin · https://coreel.ai/help/user-management-invite-roles-remove-users/

Use this guide to manage your team’s access in coReel.

Invite a User

1. Go to **Users** (/users).
2. Click **Add User**.
3. Enter required details.
4. Assign role (Manager or User).
5. Send invite.

What Happens Next

- User receives invite email
- They click link, set password, and log in
- They appear in users list once activated

Assign/Change Roles

- **Owner**: Full account control
- **Manager**: Team and selected settings management
- **User**: Standard usage permissions

Use least-privilege access: only grant Manager where needed.

Remove a User

1. Go to user management page (admin/users view if applicable).
2. Find the user.
3. Click **Delete** in Actions.
4. Confirm deletion.

Note

Deleting a user removes app access in coReel.

It does not delete their CRM contact record.

Common Access Issues

- “Can’t manage integrations”: likely role limitation
- “Can’t send”: may be role, tier, inactive account, or no active integration
- “Invite not received”: ask user to check spam/junk and retry invite if needed