PURCHASER GUIDE

CELO

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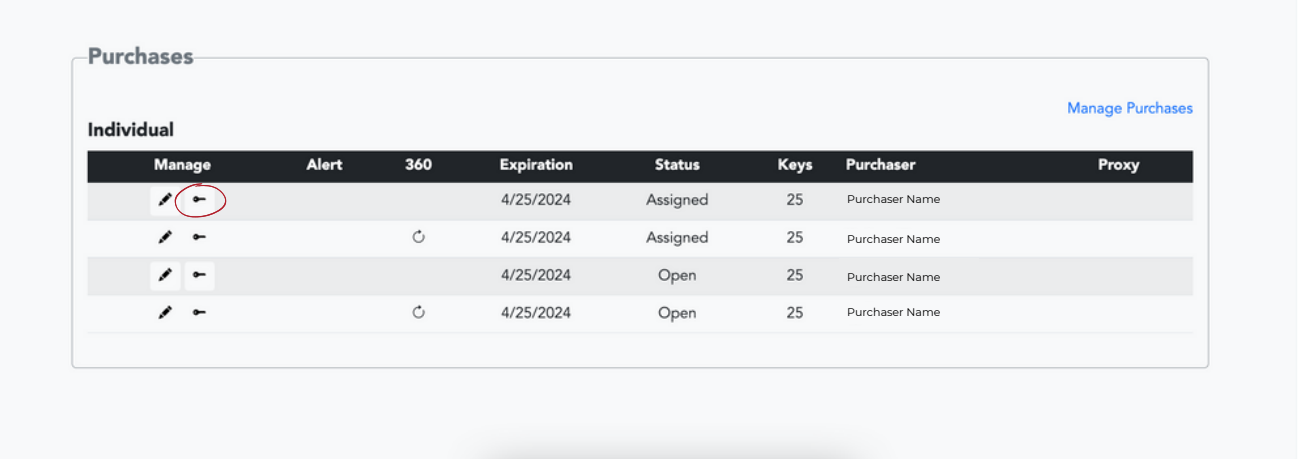
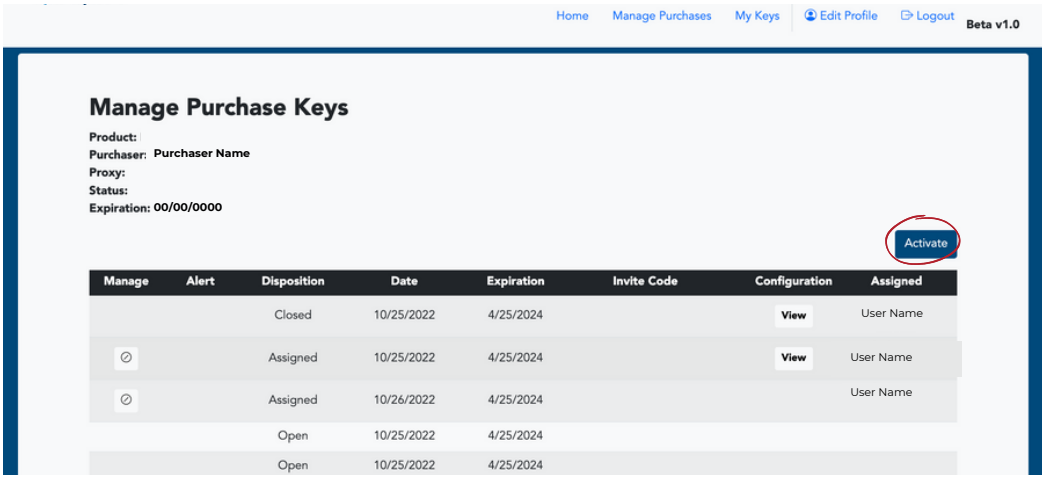
INVITE USERS

1



Click the key icon to invite your user(s).

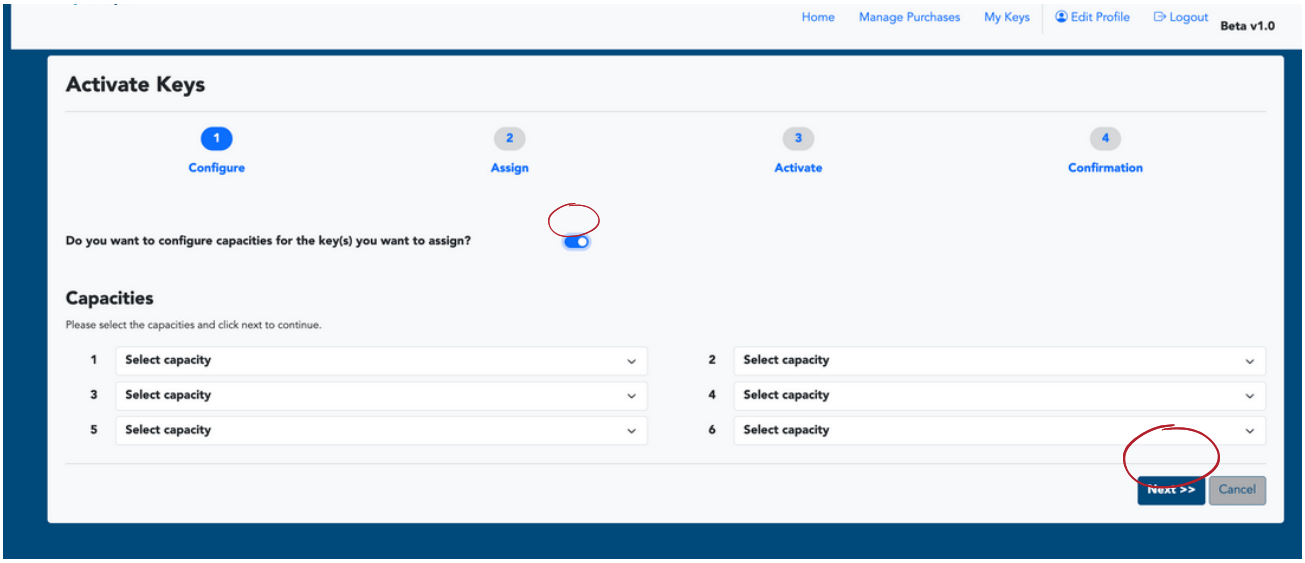
2



Click the "Activate" button.

INVITE USERS

3



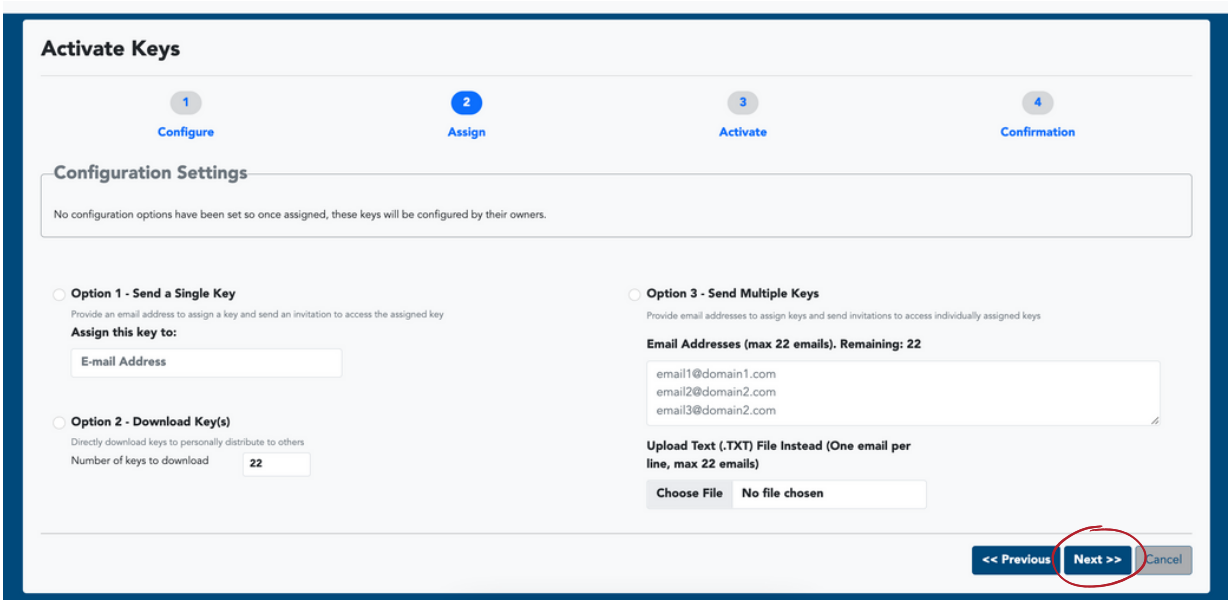
Option 1:
If you would like to pre-determine the capacities for your user(s), toggle the switch next to "Do you want to configure capacities for the key(s) you want to assign?"

Once you have selected your capacities, click the "Next" button.

Option 2:
If you would like your user(s) to select their own capacities upon receiving their key, simple click the "Next" button.

INVITE USERS

4



There are four options to invite your users:

- **Option 1:** Send a single key to one user.
- **Option 2:** Download keys / codes to send to user(s).
- **Option 3:** Send multiple keys at one time by inputting multiple user emails OR uploading a .TXT file with user emails.

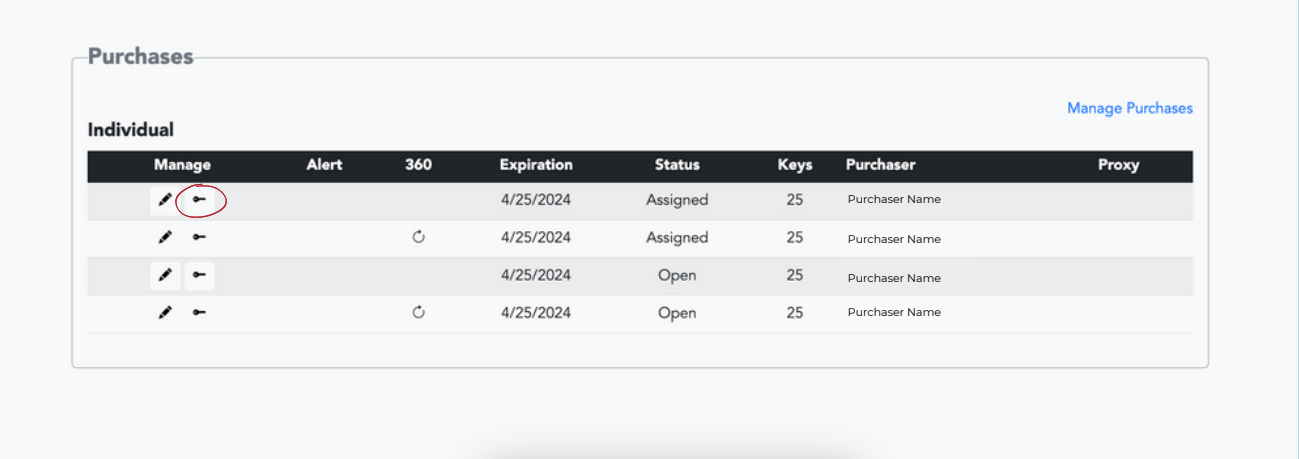
Click the "Next" button.

5 Review that your selections are reflected in the "Activate" step and "Confirmation" step, then click the "Done" button.

RECLAIM KEY(S)

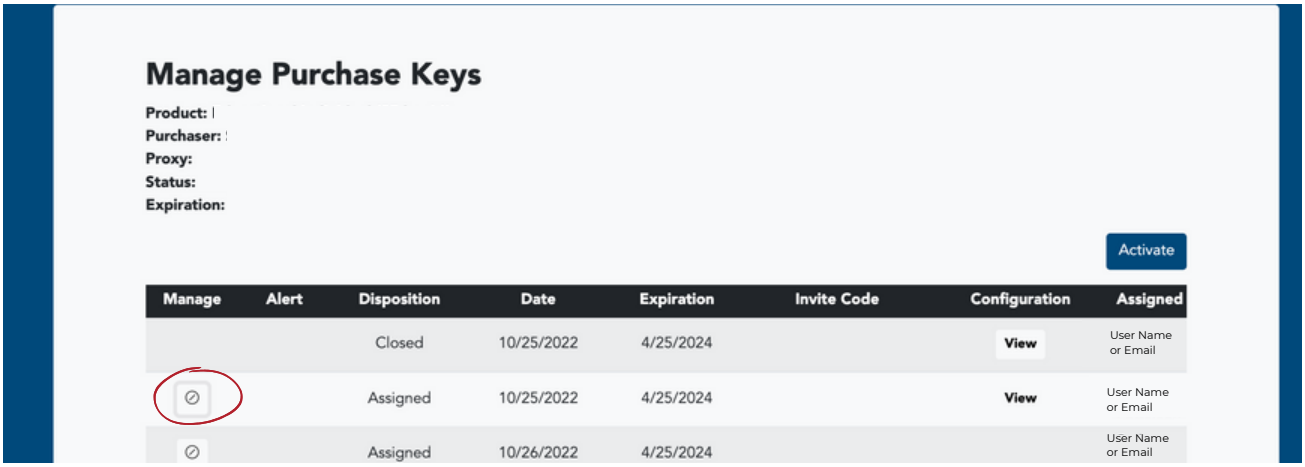
If, for some reason, you would like to reclaim a key (e.g., sent to the wrong email address, user has not opened invitation), please take the following steps to reclaim and reconfigure:

1



Click the key icon to invite your user(s).

2



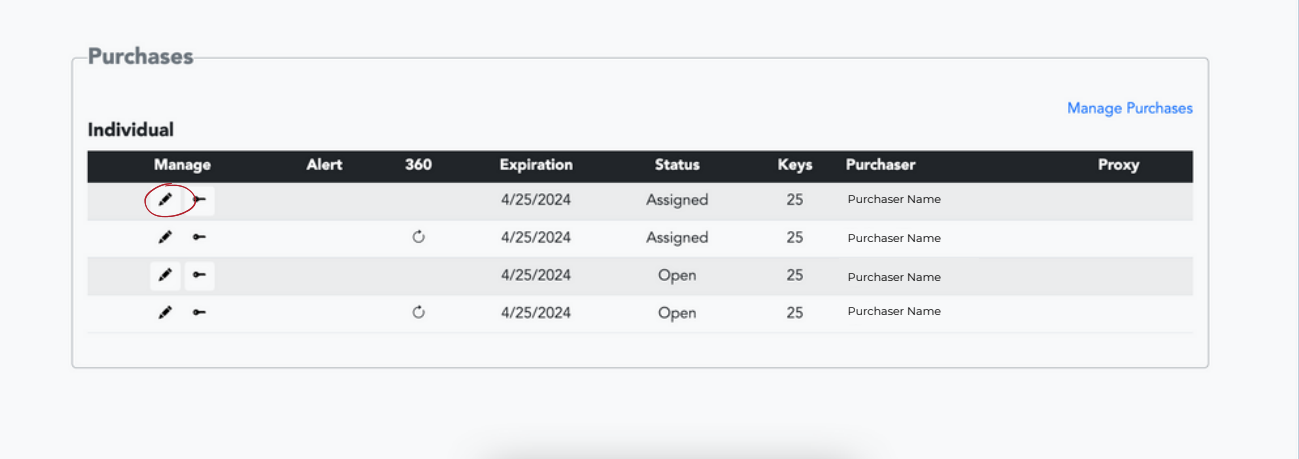
Click the circle icon to reclaim the key.

Click "Yes" when it asks you to confirm. The key will then be able to be reactivated.

OPTIONAL: ADD A PROXY ADMINISTRATOR

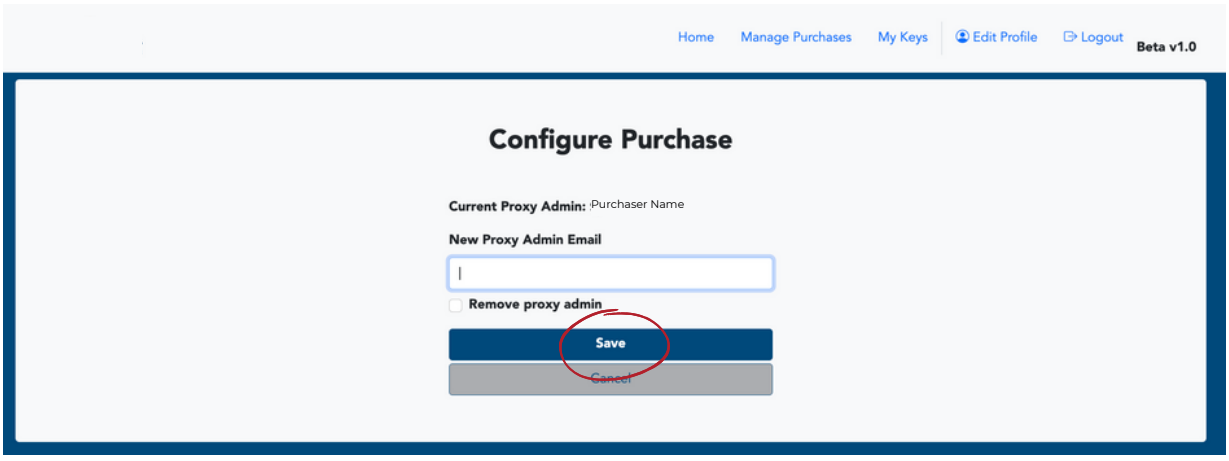
If you have an additional representative that you would like to add as a proxy (additional) administrator, take the following steps:

1



Click the pencil icon to invite your proxy administrator.

2

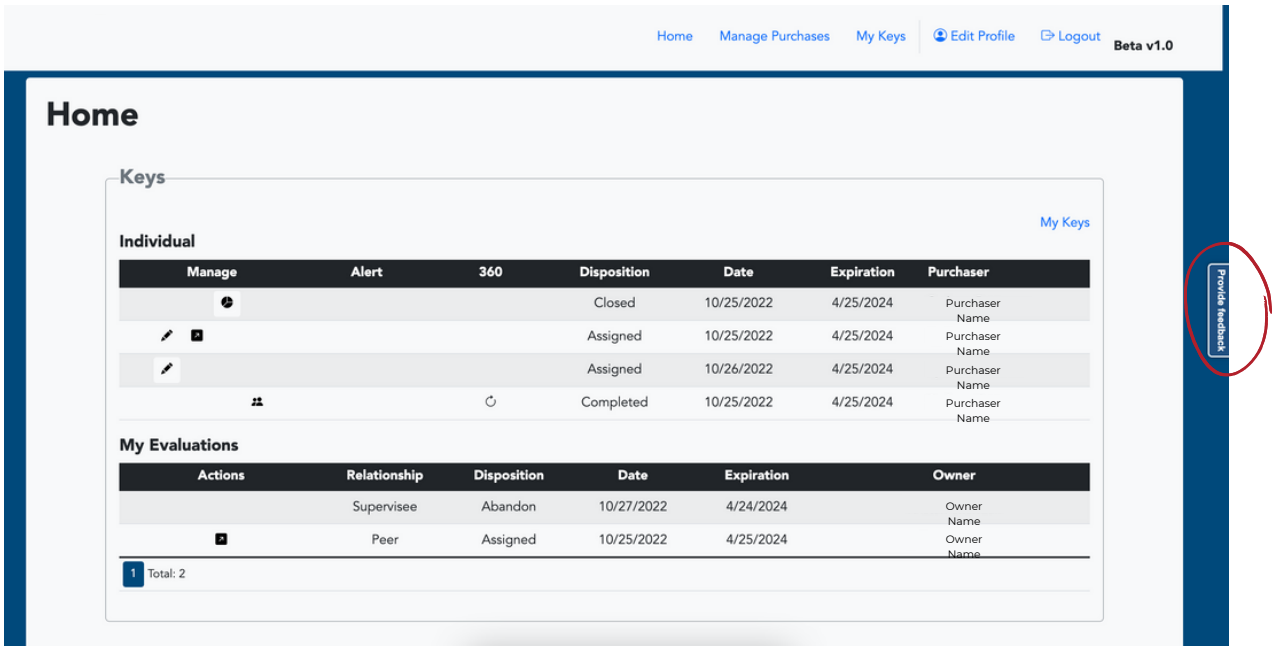


Add your proxy administrator's preferred contact email, and click the "Save" button.

The added administrator should receive an email invitation. Once they click the link in the invitation, they will be able to support in administrating keys using the Index Manager system.

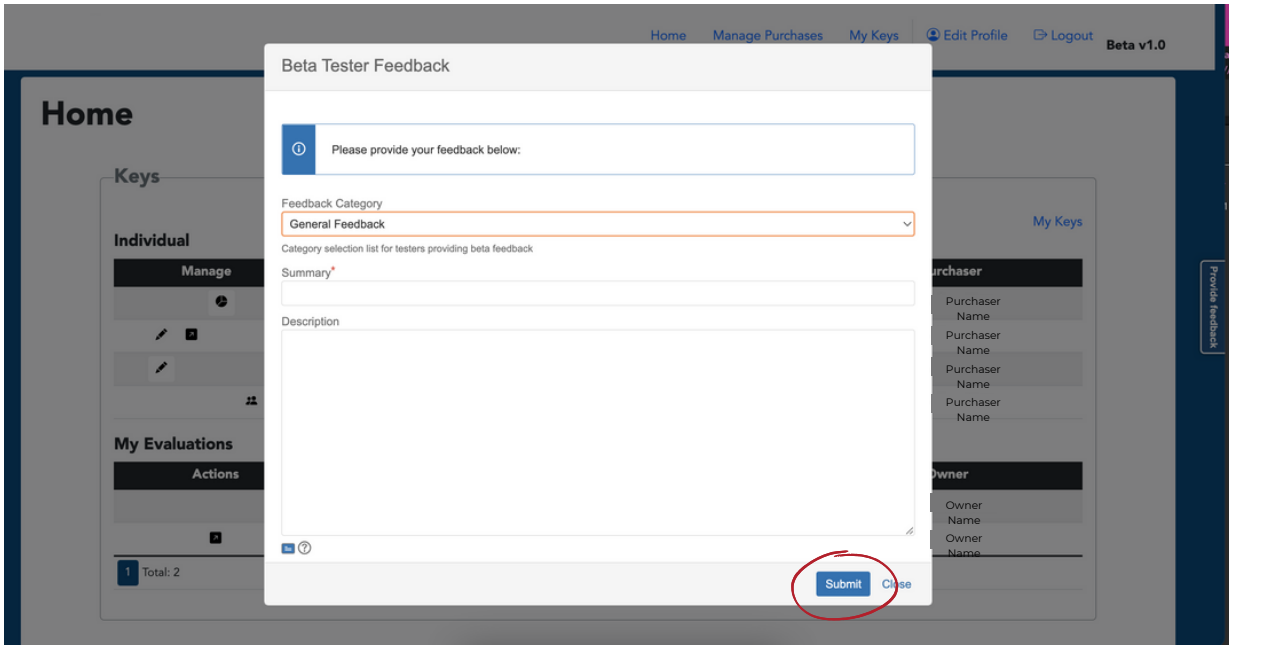
OPTIONAL:
PROVIDE SYSTEM FEEDBACK

1



To provide feedback on the Index, click on the right side tab "Provide Feedback."

2



Select the category for your feedback, provide a short summary, include a description of your feedback, and click "Submit."

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