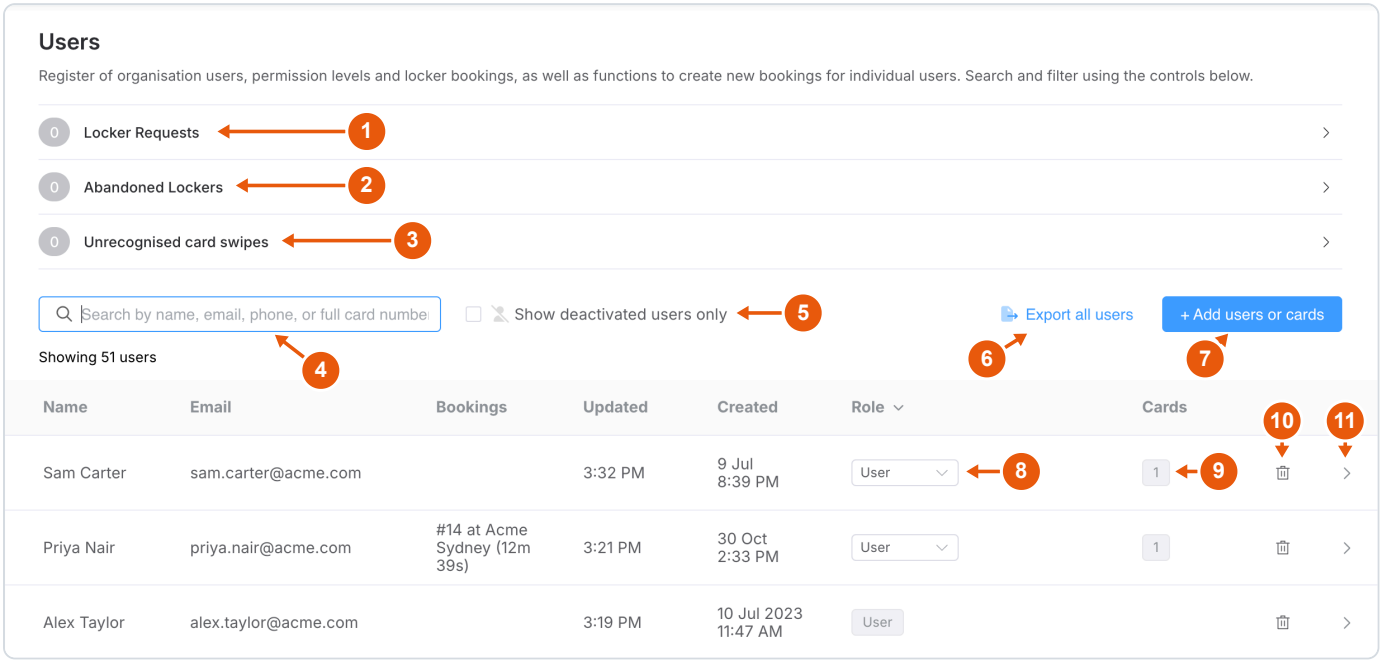
Users: Quick Guide

Yellowbox Partner Dashboard, sidebar > **Users**. Everyone in your organisation who can use your lockers: find a person, see and change their bookings and cards, and add new people.

The users page

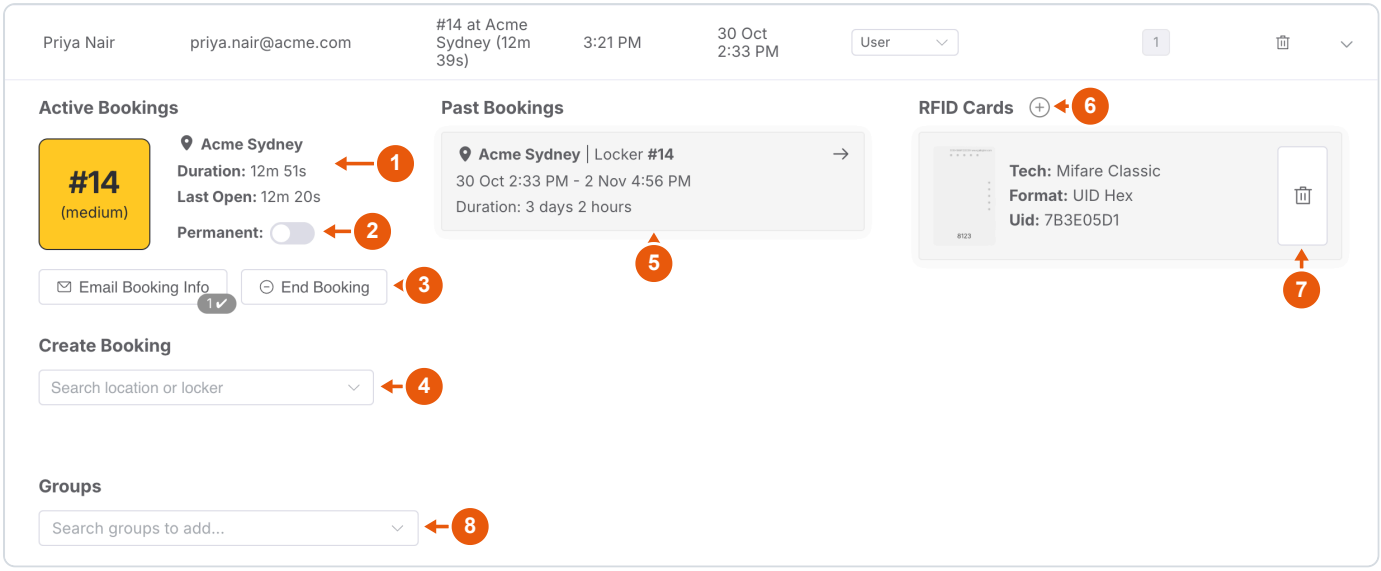


1. **Locker Requests**: people asking for a locker. Pick a free locker for them with **Choose locker**, or **Reject**. For a request to share a team locker, use **Grant Access**. The number shows how many are waiting.
2. **Abandoned Lockers**: lockers still booked by people who have been removed or deactivated. Free them with **End Booking**, also turn the locker off with **End & Disable**, or give it to someone else with **Reassign**. A switch selects them all at once.
3. **Unrecognised card swipes**: cards tapped on a reader that do not belong to anyone yet. Use **Link to user** to give the card to a person, or **Delete** to clear it. A switch shows only taps from the last 30 minutes, handy when the person is standing at the locker.
4. **Search** by name, email, phone, or full card number.
5. **Show deactivated users only**: list people whose account has been turned off.
6. **Export all users** downloads the full list (only shown if your role can export data).
7. **+ Add users or cards**: add one person, import many from a spreadsheet, or link cards in bulk (page 3).
8. **Role**: organisation admins can switch a person between *User* and *Manager* here. Click the **Role** heading to show only managers or only users.
9. **Cards**: how many access cards the person has.
10. The bin deletes the person (see Tips).
11. The arrow (or anywhere on the row) opens the person's details (next page).

The list shows the 100 most recently active people. Use **Search** to find anyone else. A plain grey label instead of a drop-down means you cannot change that role: it is your own account, the person is an organisation admin, or you are not an organisation admin.

A person's details

Click a row to open everything about that person.



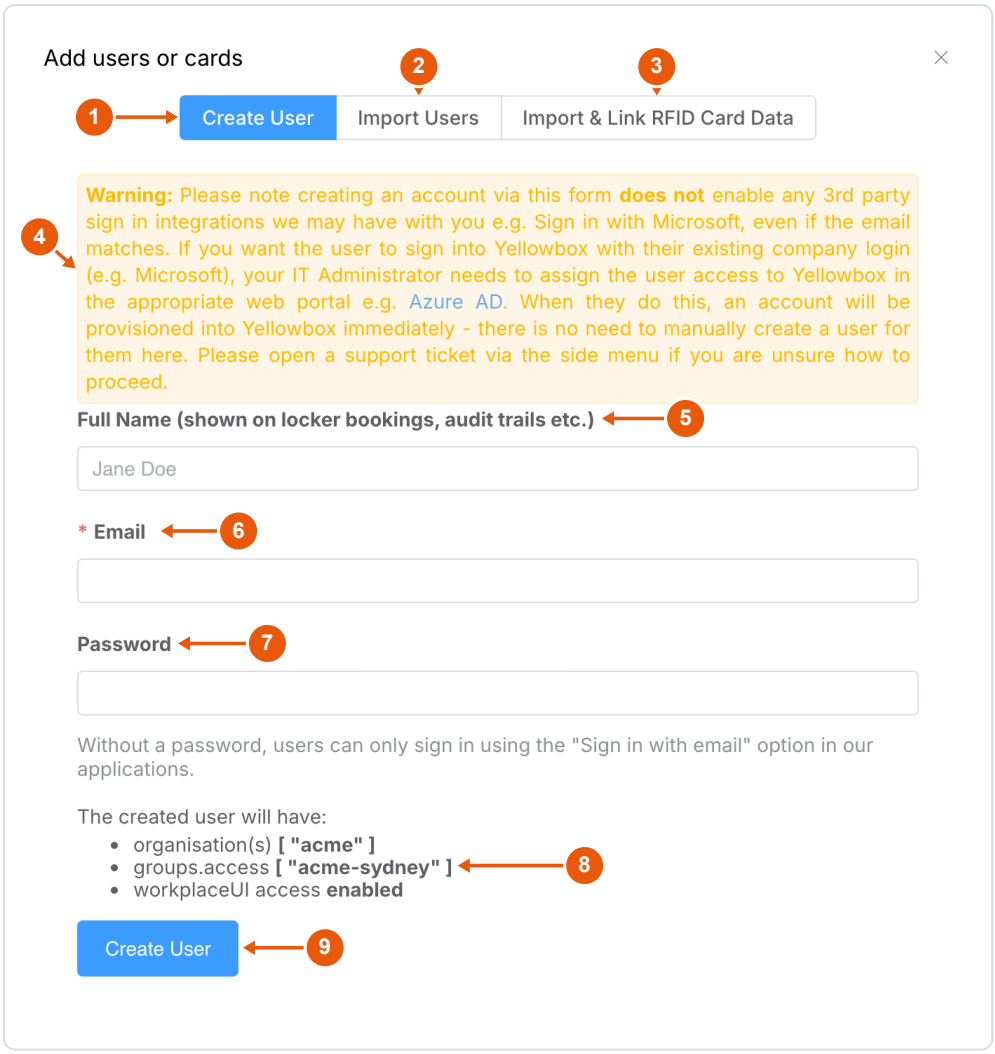
1. **Active Bookings**: each locker the person has now, with its location, how long they have had it and when it was last opened.
2. **Permanent**: turn on so the booking does not end automatically.
3. **Email Booking Info** resends the booking details to the person. **End Booking** frees the locker.
4. **Create Booking**: search for a location or locker to give this person a locker.
5. **Past Bookings**: their last three bookings. The arrow opens that locker.
6. **RFID Cards**: the person's access cards. **(+)** adds a card.
7. The bin removes a card from the person.
8. **Groups**: add the person to a group, or remove them. See the Groups guide.

If the person shares a locker or belongs to a group with a team booking, those show here too, under **Shared Bookings** and **User Group Bookings**.

Tips

- **Deleting a person** cannot be undone. Their past bookings stay in the records but can no longer be traced back to them. People who sign in with Microsoft cannot be deleted here: ask your IT team to remove their access.
- **A crossed-out person icon** next to a name means the account is deactivated, either by a manager or by your organisation's sign-in system. Hover it to see which.
- **An orange shield** next to the role marks an organisation admin. Yellowbox sets this. What each manager can do is set on the **Manager Access** page.
- **Someone tapped a new card and it did nothing?** Open **Unrecognised card swipes**, turn on *Show only from past 30 mins*, and link the card to them.

Add users or cards



1. **Create User**: add one person.
2. **Import Users**: add many people at once. Download the template spreadsheet, fill in email and display name (optionally a locker for each), upload it, check the review and import. You can choose whether to send welcome emails.
3. **Import & Link RFID Card Data**: link access cards to existing people in bulk. Download the template (it has an email column and one column for each card type your readers use), fill it in, upload it, check the review and **Confirm Import**.
4. Read the warning: an account made here **cannot** use Sign in with Microsoft. If your organisation signs in with Microsoft, ask your IT team to give the person access in Microsoft instead; their account then appears here on its own.
5. **Full Name**: shown on bookings and in the history.
6. **Email** (required).
7. **Password** (optional, at least 6 characters). Without one, the person signs in with *Sign in with email*.
8. The organisation and access the new person will get.
9. **Create User** adds the person.

Screenshots use sample data.