

Set Up a Test for Account Template Changes

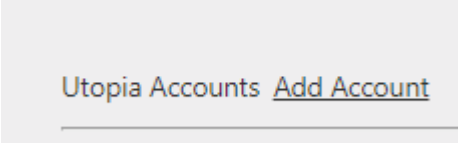
Create a New Account via a script

- Use the LastPass entry "The Hub DB Access" for information to get set up locally with the Hub database. (May need to request access)
- Use the script in LastPass under "Copy Hub Utopia Account SQL Script" to generate a new account with the associated features.
 - **Be sure to update** the **UtopiaAccountId** to one that matches what you're wanting to duplicate and the **UserId** to be your user ID, or the user ID you want associated with the account.
- Log into the Hub to verify the account is properly set up and associated with the correct user.

Create a New Account in the Hub Manually

****Note:** requires manually adding the features. Strongly recommend using the script instead.

- Log into the Hub
- Go to the user and click Add Account



Utopia Accounts [Add Account](#)

- Create the new test account

- Follow the configuration in this image (can set up for prod, but usually will use stage)

Create

Account Type	Revver ▼
Account Status	Enabled ▼
Storage Type	AWS_S3 ▼
Utopia Instance	(Dev Use Only) AWS Staging Utopia Instance ▼
Partner	Caselle ▼
Account Template	Caselle ▼
Send Initial User Email	<input checked="" type="checkbox"/>

[Back to User](#)

- Click create
- Then go back and edit the account to add an expiration date.
- Add Features to the account

Create a New User in the Hub

It's easier to set up the new account under your user so you can add Caselle as a user, but if you don't need access and just want to set it up with their user here's the step for a new user.

- Create the new user
 - add the test email in the Login input field

EFC User Create

Login

test@caselle.com

Password

Full Name

Phone Number

Company

Address

City

State

Postal Code

Country

Industry

Create

| [Cancel](#)

Revision #3

Created 30 September 2024 20:18:53 by Rachel Hicken

Updated 30 September 2024 23:34:45 by Rachel Hicken