

# MindView Accounts Portal - User Management

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MindView Accounts Portal: <https://accounts.matchware.com/>

## Overview

This article explains how to create, manage, and control user access in the MindView Accounts Portal. It is intended for administrators responsible for managing users and licenses within their organisation.

## Adding Users

How do I invite users via a link?

You can quickly create users using the Invite Users feature.

Steps:

1. Log in to your MindView Account as an administrator
2. Go to Admin → Users
3. Click Invite Users
4. Copy the link and distribute it to users

Result:

Users will be created and associated with your account

Users will automatically be assigned a product license (if available)

Note:

Clicking Create New Link will invalidate the previous link

This is useful if you want to remove old invitations or prevent misuse

## How do I add users manually?

Steps:

1. Log in as an administrator

2. Go to Admin → Users
3. Click Add User
4. Enter the user's name and email
5. Select a role (User or Admin)
6. By default, a license will be assigned (if available)
7. To prevent license assignment, select Do Not Assign License
  
8. Click Create

Result:

The user will receive a welcome email

The user will only have access to products if a license is assigned

## How do I import users in bulk?

You can import multiple users using a CSV or Excel template.

Steps:

1. Log in as an administrator
2. Go to Admin → User Management
3. Click Import Users
4. Download the template
5. Populate the file with user details
6. Click Choose File, select the file, and click Import

Result:

All users will be created

Users will receive a welcome email

## Advanced User Management

How do I manage users through Azure Active Directory (AD)?

If your organisation uses Microsoft accounts, you can link your tenant to your MindView account.

Steps:

1. Log in using your Microsoft account (Microsoft Login icon)
2. Enter your credentials (or complete SSO login)
3. Go to Admin → User Management → Manage users through Active Directory
4. Confirm the Tenant ID (auto-filled if logged in)
5. Click Use

Result:

All users within the tenant can log in using Microsoft

New users will automatically be added to the account

Users will be assigned a license (if available)

## **Can I restrict access using a Security Group?**

Yes, access can be limited using an Azure Security Group.

Steps:

1. Create a Security Group in the Microsoft Azure Portal
2. Add the Security Group ID in the Active Directory setup page

Result:

Only users within the Security Group can log in

## **How do I manage users via an email domain?**

Users can automatically join your organisation if they sign up with a specific email domain.

Steps:

1. Contact MatchWare to request domain setup
2. Once configured, users signing up with that domain will:

- o Be associated with your account
- o Be assigned a license (if available)

## How do I enable third-party login (SSO)?

Supported login providers:

Google

Microsoft

Facebook

Users can select an external login provider when signing up or logging in.

To connect a provider to an existing account:

1. Log in as an administrator
2. Go to Profile → Connected Accounts
3. Click Connect next to the provider

## Organisation Settings

How do I set the data storage location?

By default, users can choose their own storage location. Administrators can enforce a single location.

Steps:

1. Log in as an administrator
2. Go to Admin → Settings → Storage Location
3. Click Change
4. Select a storage location

Result:

If set to User selected, users can choose their own location

If enforced, all users will use the selected location

Available Storage Locations:

East US (Virginia)

France Central (Paris)

Germany West Central (Frankfurt)

UK South (London)

West Europe (Netherlands)

## How do I merge accounts?

If users have separate accounts (e.g. trial accounts), you can merge them.

Steps:

1. Log in as an administrator
2. Go to Admin → Settings → Merge Accounts
3. Enter the administrator email of the account to merge
4. Click Verify
5. (Optional) Add a message
6. Click Invite

Result:

A merge invitation is sent to the specified email

The recipient must confirm the merge using their password

All users and licenses will be moved to your account

## How do I limit login methods?

Administrators can control which login methods are allowed.

Steps:

1. Log in as an administrator
2. Go to Admin → Settings → Allowed Login Types
3. Deselect any login methods you want to disable

Result:

Only selected login methods will be available to users

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