MANAGING STRUCTURES

> You are the manager of your company in Chorus Pro. Your profile allows you to update your companies information on Chorus Pro.

1. Check your role

There are 3 user types on Chorus Pro :

- **Primary manager** > by default, the one who created the company
- **Secondary manager** > appointed by the primary manager
- **Simple user** > attached to the entity for which invoices have to be issued

> In Chorus Pro, only users with a manager role have access to structure and users administration datas, described in this fact sheet.

In the field **My account**, in the **My structures connections** block, you will find a list of all the structures to which you are attached as well as the corresponding assigned role

Structure identifier ↕	Corporate name ↕	Role ↕	Connection status	Actions	☐
39012665400024 ✎	78 RUE D'AUTEUIL	Primary manager	Validated	👁 ⇄	☐

2. Manager's main activities

Management of your structure and its users is possible from the **Manager Activities** area

A. Accessing the « Manager activities » ara

LOGGED-IN HOMEPAGE	**MANAGER ACTIVITIES**	ISSUED INVOICES	SENT REQUESTS	MY ACCOUNT

> *The « Manager activities » area doesn't appear in your menu ? It is likely that you have neither a primary nor a secondary manager role in Chorus Pro.*

B. Set up your structure

You can modify or update some information about your company.

In **My structures** block, click on the pencil button (icon giving you access to the modification screen) :

Structure identifier ↕	Corporate name ↕	Creation date ↕	Services	Status ↕	Actions	☐
39012665400024	78 RUE D'AUTEUIL	22/05/2019		ACTIF	✎ 🔄	☐

C. Les informations utiles

- **General information :** The gray « *payment request* » block appears automatically in the « *Used applications* » block. Do not delete this field, otherwise you won't be able to issue invoices

- **Bank account details :** Allows joining your bank account details (including those of a facturing institution) on your invoices. Watch out : these will be the bank details communicated in order for your company to be paid.

- **Services :** Thanks to the function **Add services**, you can create « services », subsets within your legal entity identifier (SIRET) to limit the rights of users to a restricted perimeter. Users can be enabled by service.

- **Areas :** The access to areas depends on the user status. Click on **Add areas**, select **All services** in order to manage areas at a structure level or select the corresponding service to do so on a service level. Then click on **Show** or **Modify** depending on the rights you want to assign to your users. Caution : To be able to issue or submit invoices, it is necessary to be enabled in *Modify.*

- **Invoicing mandate :** The subscription to an invoicing mandate is mandatory to allow your users to use the « Input invoice » mode.

D. Transferring the primary manager's role

If you are the primary manager, you can transfer your role to another user.
In the **My account** area, in the **My structures connections** block, click on the ⇄ symbol in order to transfer the primary manager's role.

A confirmation window pops up:

Select the relevant structure by checking the related box, then click on **Validate**.

You must then designate the **new primary manager** by filling in the user's login ID.

E. Modifying your legal entity identifier (SIRET)

In the event of a change of the legal entity identifier (SIRET), go to the **General Information** block , then click on the **Change identifier** button. Your old structure will be disabled but invoices issued or received invoices before deactivation can be viewed and processed.

You can find more information in the managing structures and users guide.
https://communaute.chorus-pro.gouv.fr/documentation/administrer-les-structures-et-les-utilisateurs/?lang=en#1531383306914-38b00733-4d7d