



Set Up Your Organization

Review your organization's name before inviting colleagues. The organization is provisioned in advance; this procedure does not create a new organization or account.

Before You Begin

Sign in as an active **Owner**. Your initial Owner account already has a password and multi-factor authentication (MFA) configured. Administrators and Members cannot change organization settings.

Review the Organization Details

1. Open **Settings > Organization**.
2. Check **Organization ID** to confirm the organization you are administering. The ID is read-only.
3. If needed, update **Organization name**. Enter 2–80 characters; surrounding spaces are ignored.
4. Select **Save changes**.

A screenshot of the Northstar Cloud user interface showing the 'Organization' settings page. The page has a light blue header with the 'Northstar Cloud' logo on the left and the user's name 'Alder Field Services | Morgan Ellis' on the right. Below the header, the breadcrumb 'Settings / Organization' is shown. The main title 'Organization' is in a large, bold font. There are two input fields: 'Organization name' with the value 'Alder Field Services' and 'Organization ID (read-only)' with the value 'org_alder_001'. A note below the fields states: 'The organization ID does not change when you rename the organization.' A 'Save changes' button is located at the bottom right of the form area.

Northstar Cloud Alder Field Services | Morgan Ellis

Settings / Organization

Organization

Organization name Organization ID (read-only)

Alder Field Services org_alder_001

The organization ID does not change when you rename the organization.

Save changes

Organization settings with an editable name and read-only ID. Northstar Cloud 1.0 — fictional product mockup.

The updated name appears throughout Northstar. Changing the name does not change the organization ID.

Save changes is unavailable until you change a value.

Prepare for Onboarding

Choose how colleagues will sign in before sending invitations. Password sign-in is available by default. If you plan to require single sign-on (SSO), configure and test the connection first.

1. Review **Roles and Permissions** and decide which colleagues need administrative access.
2. If you use an identity provider, follow **Configure SSO** to test and enable the connection.
3. Review **Configure MFA** to decide whether to require MFA for Members who sign in with a password.
4. Follow **Invite Your First Users**. Use the same email address that your identity provider supplies if the person will use SSO.
5. After users accept their invitations, follow **Create and Manage Teams** to organize them.

Retain Owner Access

An organization must retain at least one active Owner. Invitations cannot assign the Owner role. After a colleague activates their account, an existing Owner can assign that role through user details.

Owners retain password sign-in with mandatory local MFA even when SSO is required. Keep your recovery codes available so you can use this recovery route if the identity provider is unavailable.

Dates and Times

Activity timestamps and report date ranges use UTC. There is no organization timezone setting.

Related guides: Invite Your First Users; Roles and Permissions; Configure SSO; Configure MFA.