


Update Users

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Summary

Use this screen to manage Users

Key to icons

 = edit or type unknown

 = delete or type unknown

Summary

This screen shows basic information about your system users.

Column	Purpose
User	Login name
Email	User email address
Last Logged	The date the user last logged into the system
Last IP Address	The last IP address from which the user logged in
Logins (month)	Number of logins within the last month
Logins (year)	Number of logins in the last year
Two factor authentication	Has the user got 2FA setup?

User Management

Use this screen to setup or edit new users.

Setup

User Details

Field	Purpose
Username	<i>Enter the user's username - this will be user when logging in, and in in the CMS</i> <i>Must be unique</i>
Full Name	<i>Enter the user's full name</i>
Email	<i>Enter user's email address</i>
Job Title	<i>Enter the user's job title</i>
Location	<i>Choose the user's default Store (used for default Sales Store when placing POS and Telephone Orders)</i>
Commission Percentage (%)	<i>Enter a commission percentage for the User</i> <i>Used to calculate commission in the Sales by User report</i>
Weekly Sales Target (£)	<i>Set a weekly sales target for this user</i> <i>This will be used to measure performance within the POS</i>

Permissions

User Type

Toggle permissions for the user.

Field	Purpose
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User Type	<p>Choose from:</p> <ul style="list-style-type: none"> • <i>superuser (ability to control other users, full access to CMS)</i> • <i>administrator (limited access to CMS)</i> • <i>store staff (access to POS only)</i>
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Access Privileges

Toggle the tick boxes to determine which sections of the CMS this user has access to.

☒ orders

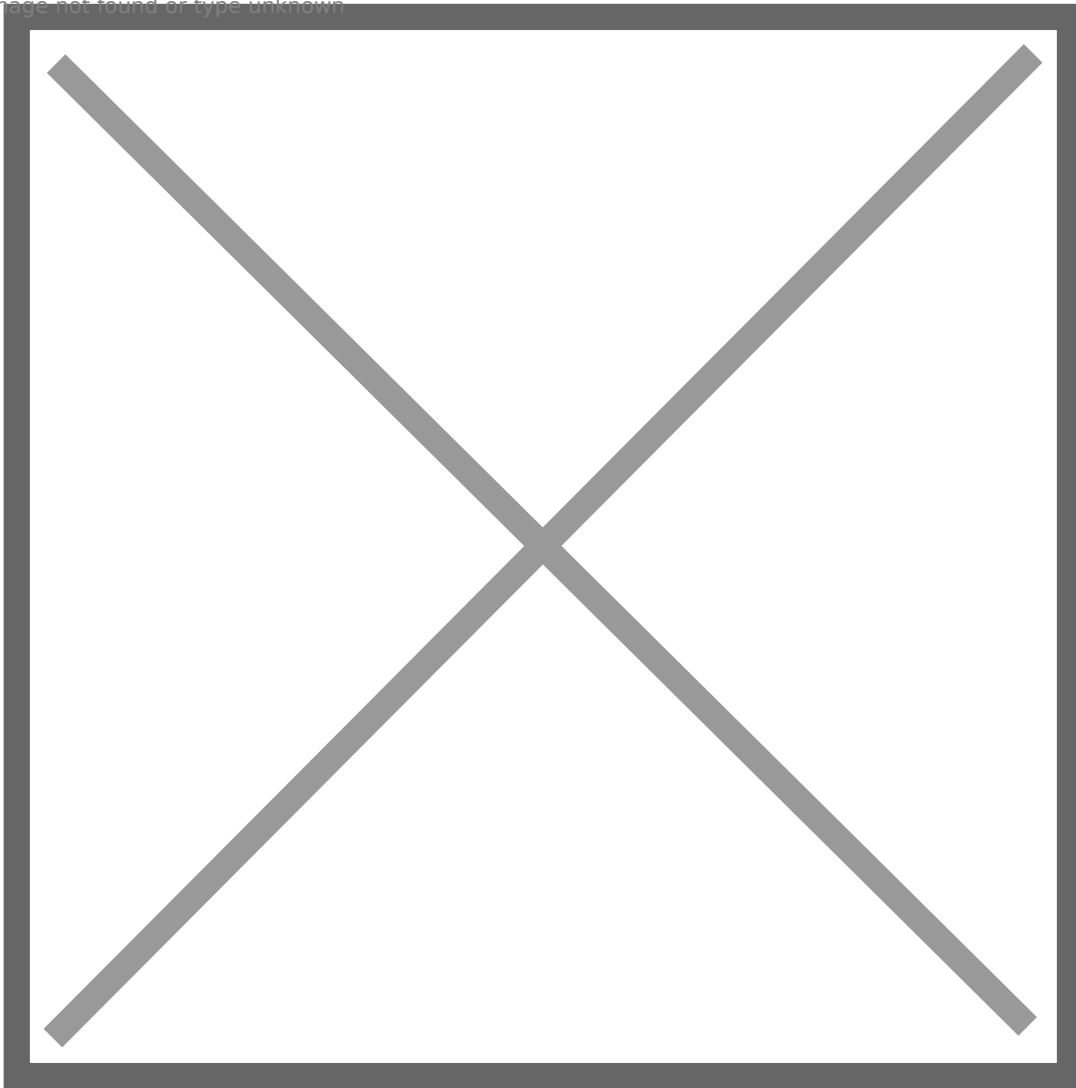
- ☒ Sales Orders
- ☒ Create New Order
- ☐ Live Baskets
- ☒ Packing
- ☐ Scheduling
- ☐ Postage
- ☐ Promotions
- ☐ Countries
- ☐ Currencies

How to Set Up a New User

A new user can be set up easily by a 'superuser' from within the CMS.

1. Navigate to your CMS.
2. Click "Update Users" under the Dashboard icon.

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3. You will see a list of all current users - Click "add a user".

Only a 'superuser' can add and change users.

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4. Enter the desired Username and Full Name, along with the appropriate email address.

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5. Select the appropriate User Type.

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6. Select the appropriate permissions.

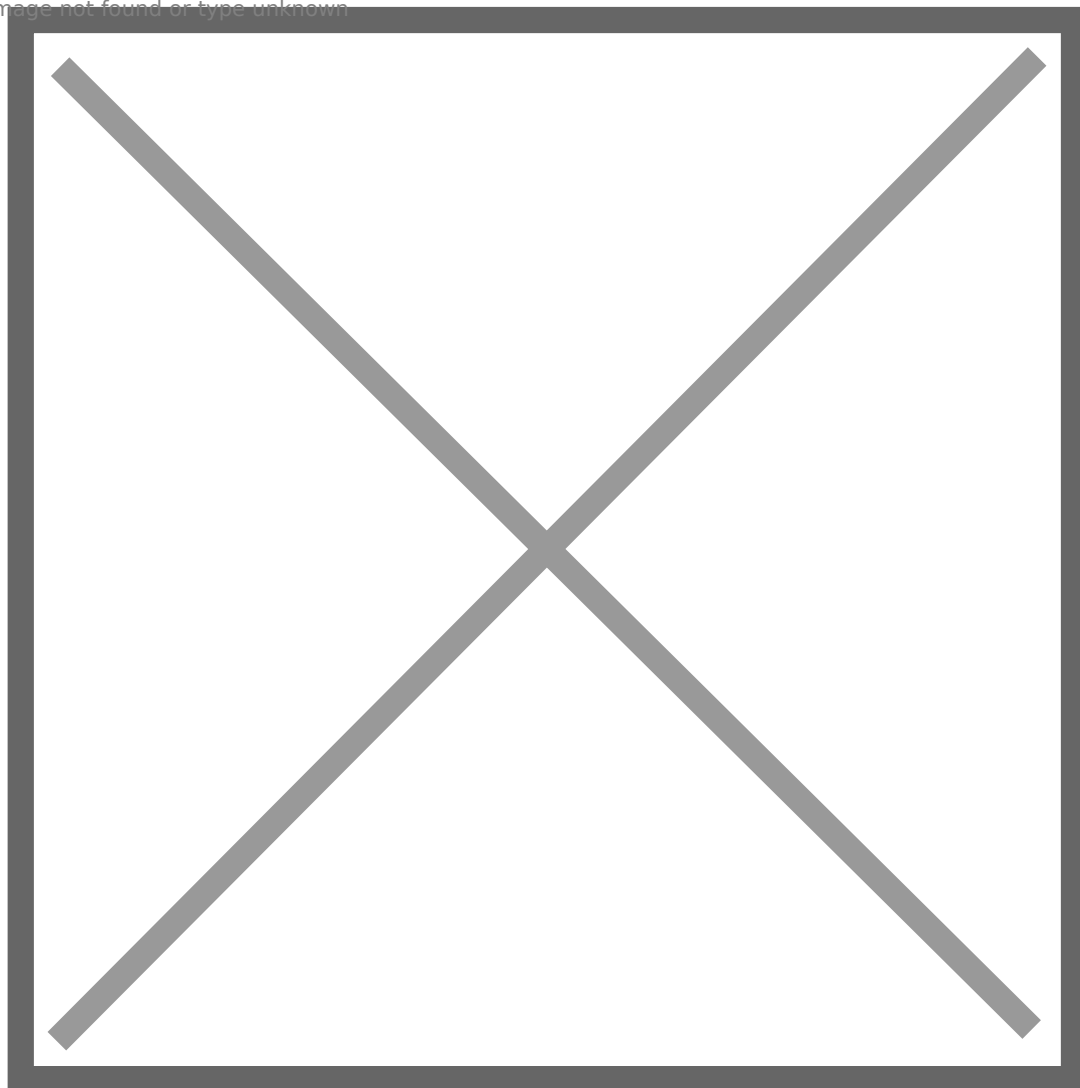
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7. Click the "Enabled?" toggle.

The "Enabled?" toggle is also useful if you wish to disable users

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8. Create a new password.

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9. Click "Add" to create the new user.

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