

Update Users

- [Summary](#)
- [User Management](#)
- [How to Set Up a New User](#)

Summary

Use this screen to manage Users

Key to icons

 = edit or type unknown

 = delete unknown

Summary

This screen shows basic information about your system users.

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

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	Choose from: <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

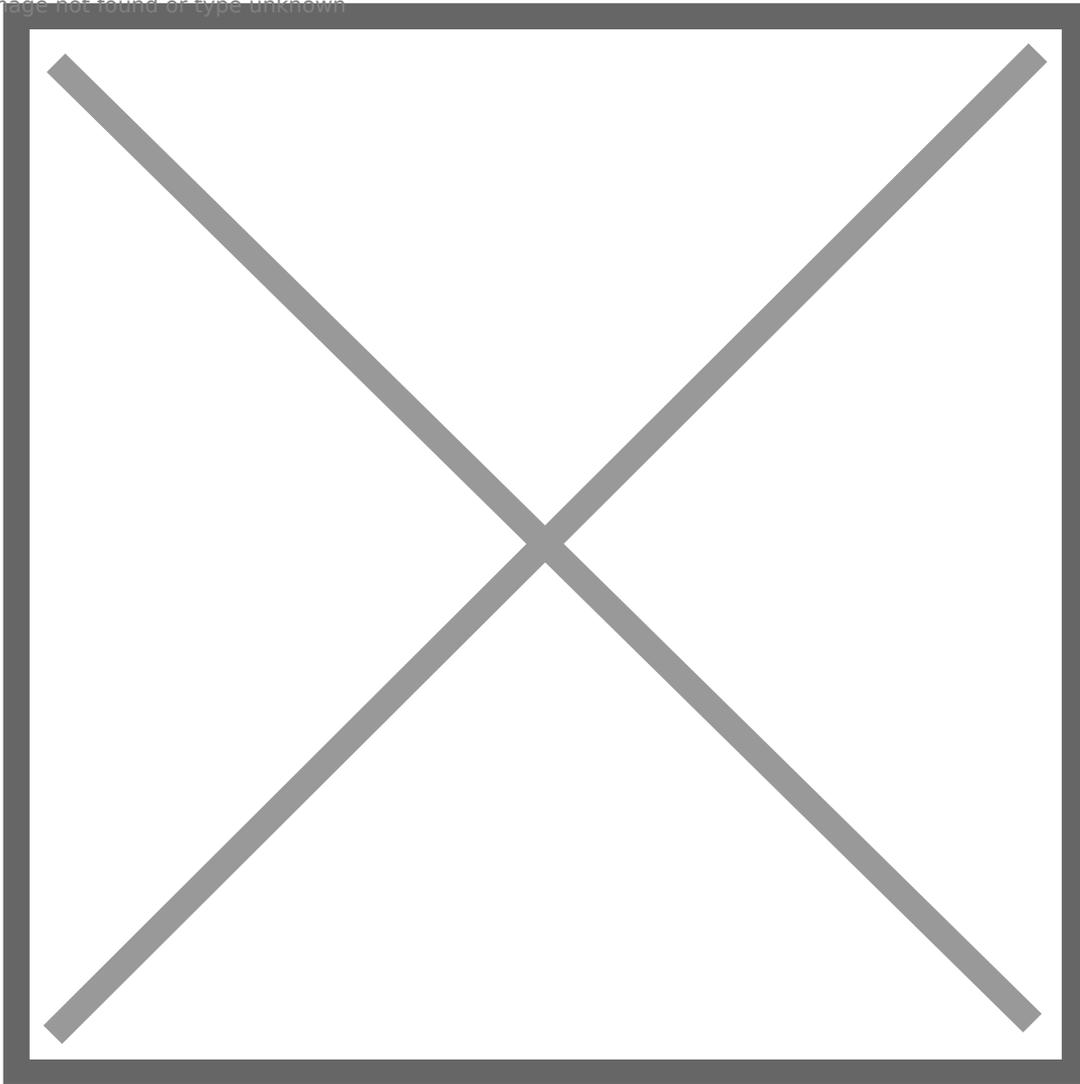
- Sales Orders
- Create New Order
- Live Baskets
- Packing
- Scheduling
- Postage
- Promotions
- Countries
- Currencies

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.

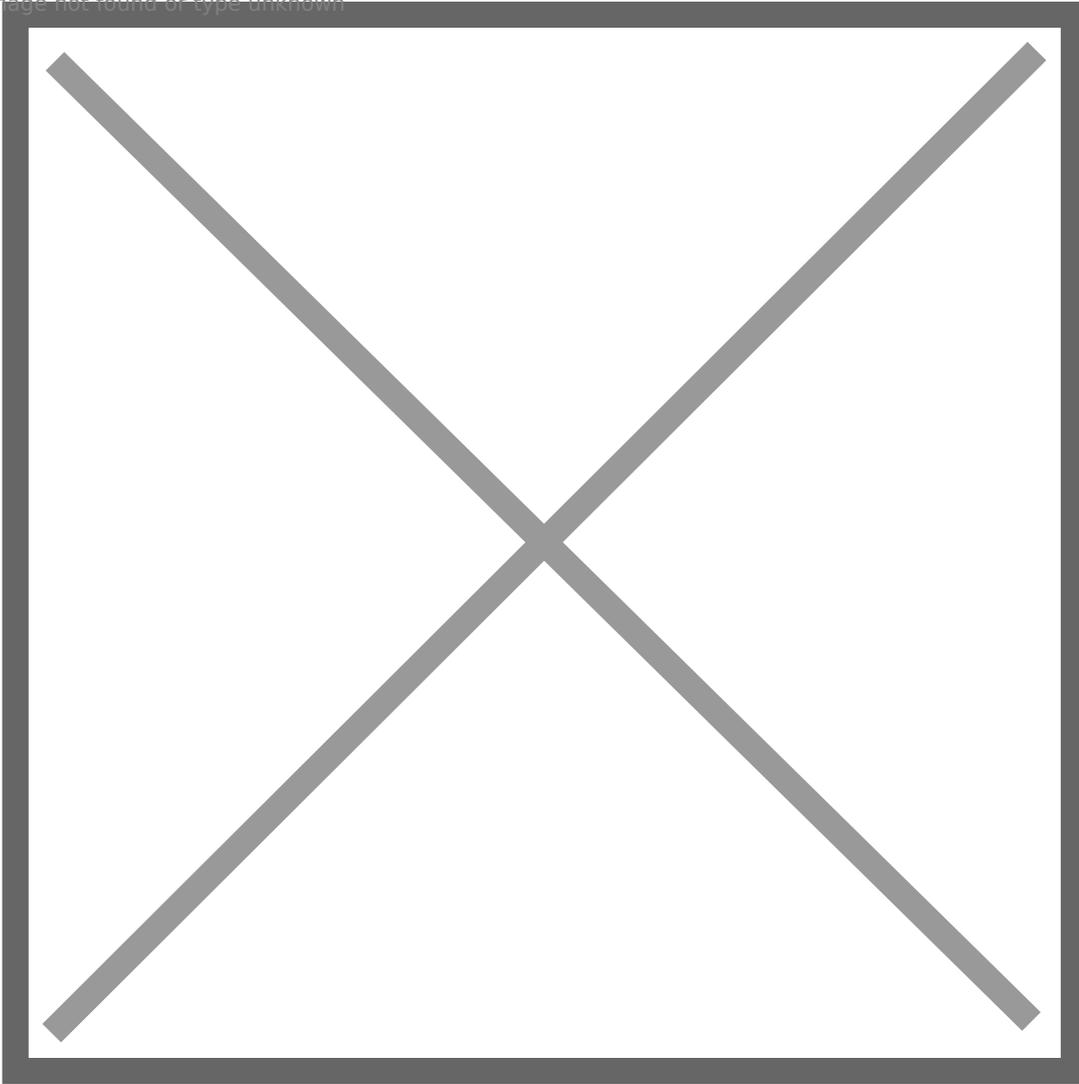
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3. You will see a list of all current users - Click "add a user".

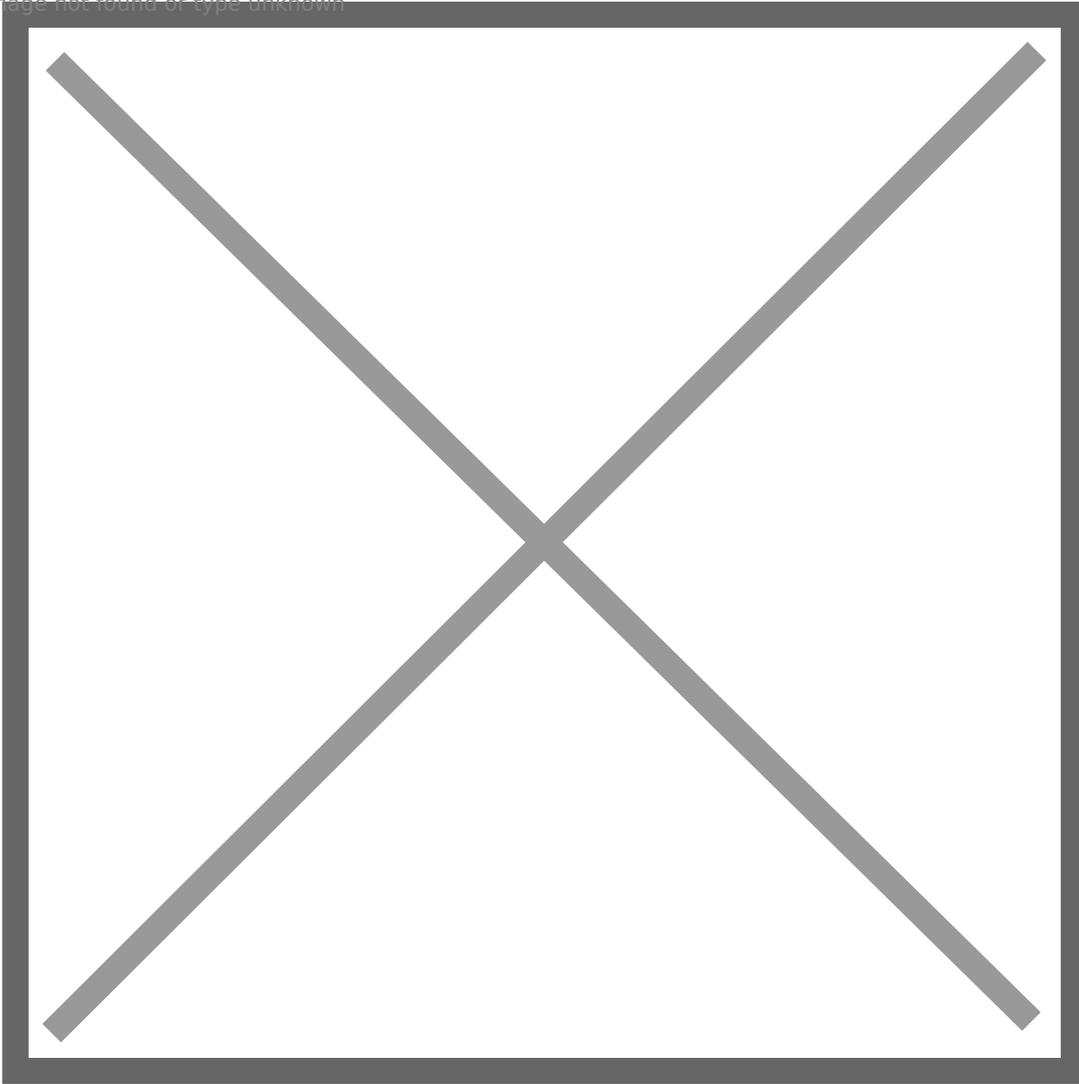
Only a 'superuser' can add and change users.

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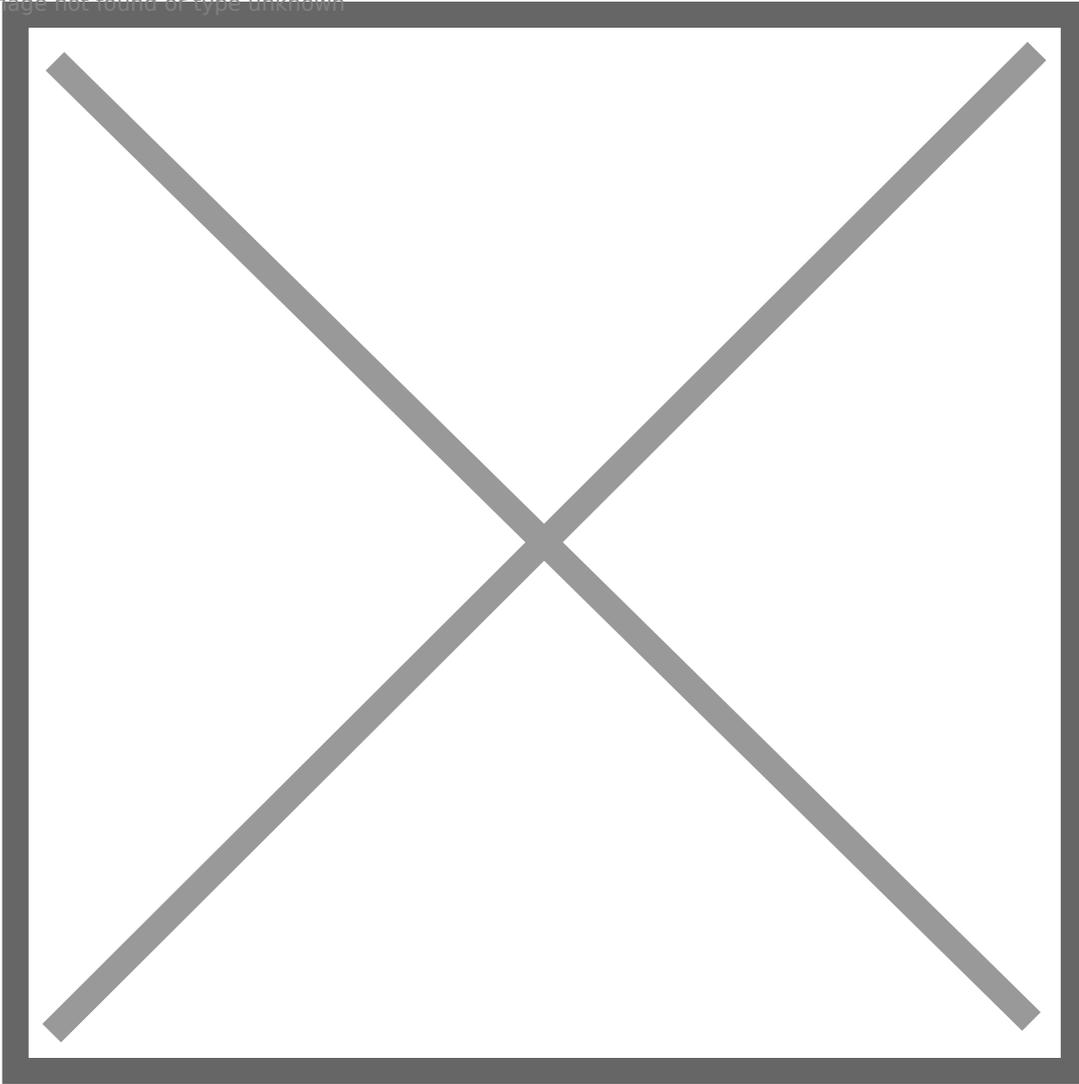
4. Enter the desired Username and Full Name, along with the appropriate email address.

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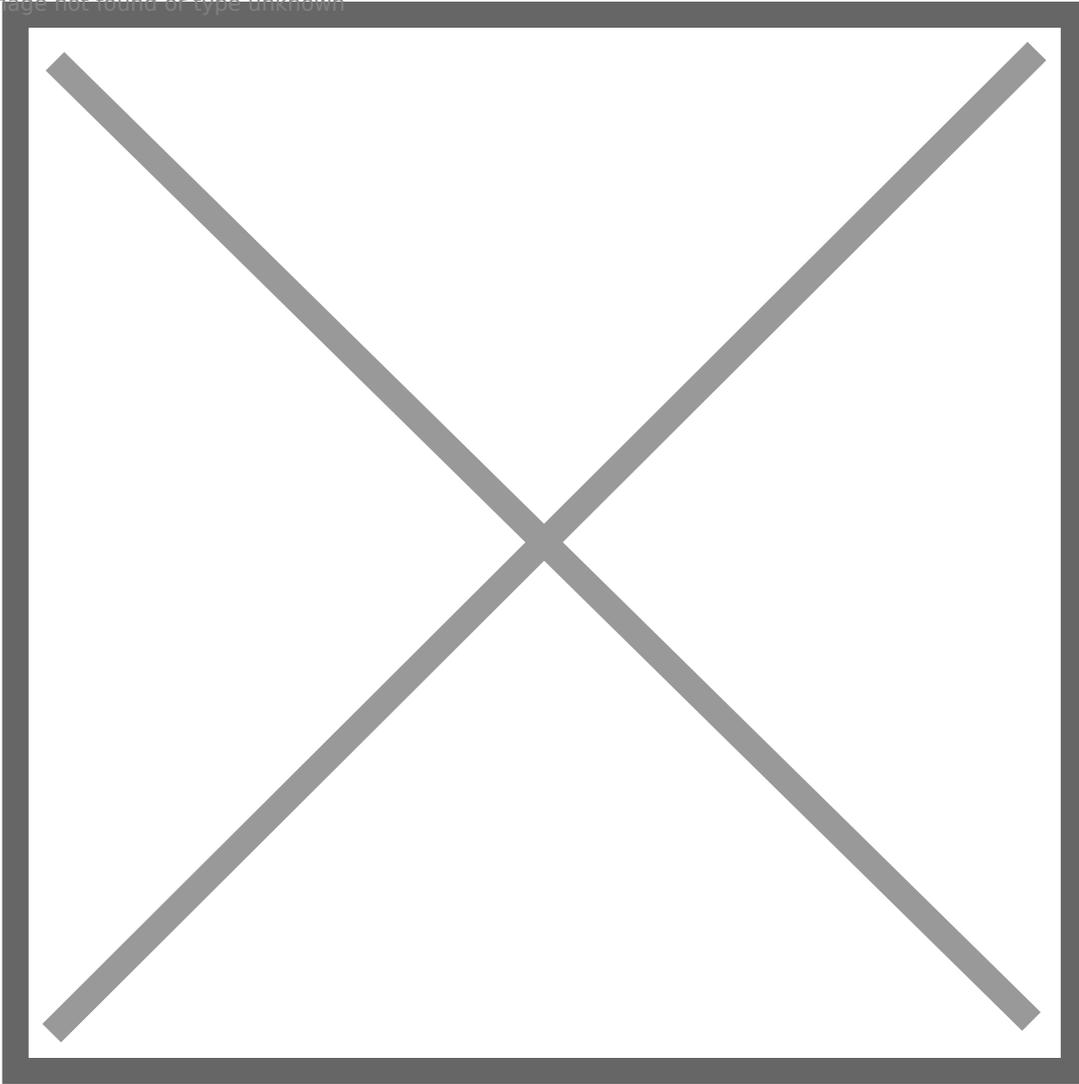
5. Select the appropriate User Type.

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6. Select the appropriate permissions.

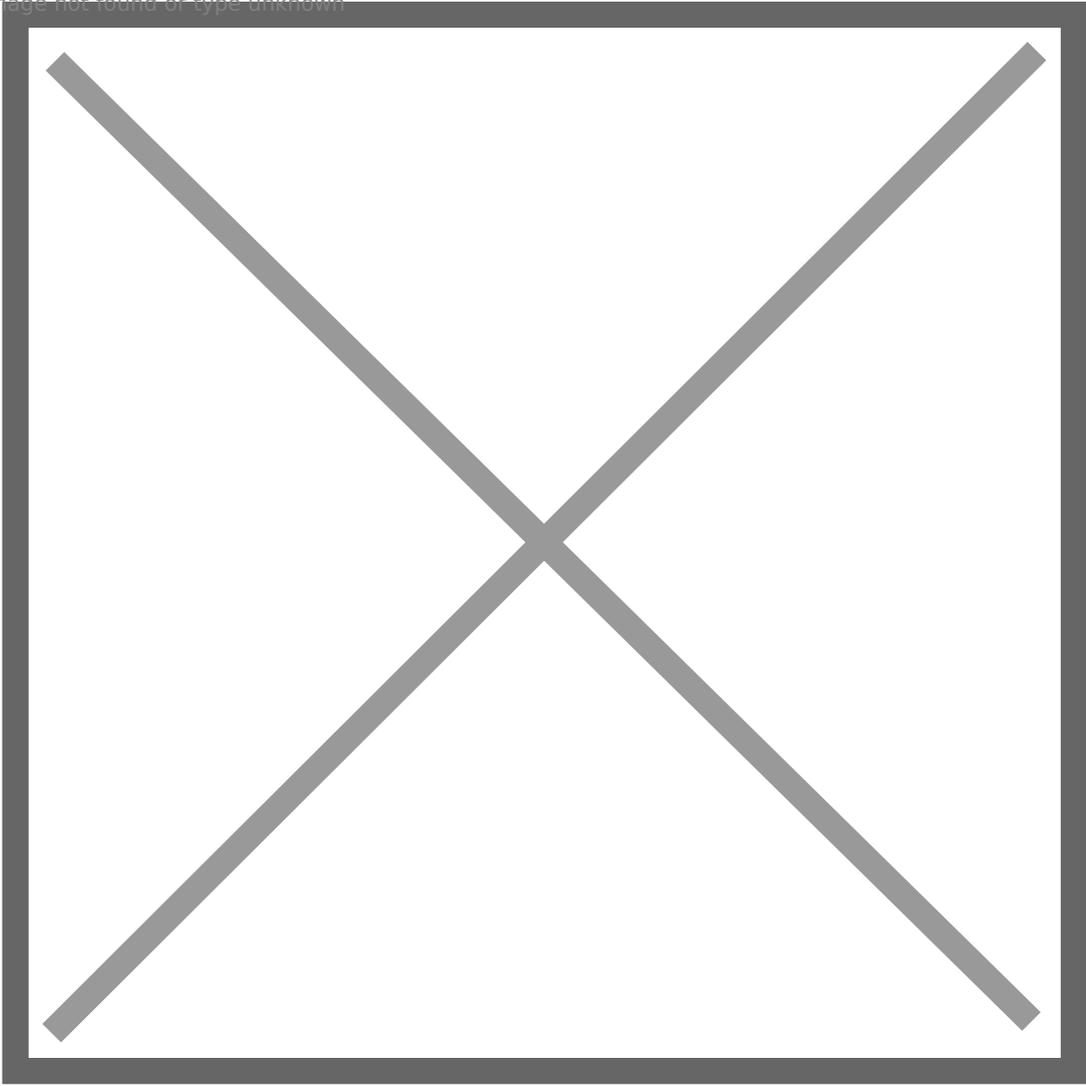
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7. Click the "Enabled?" toggle.

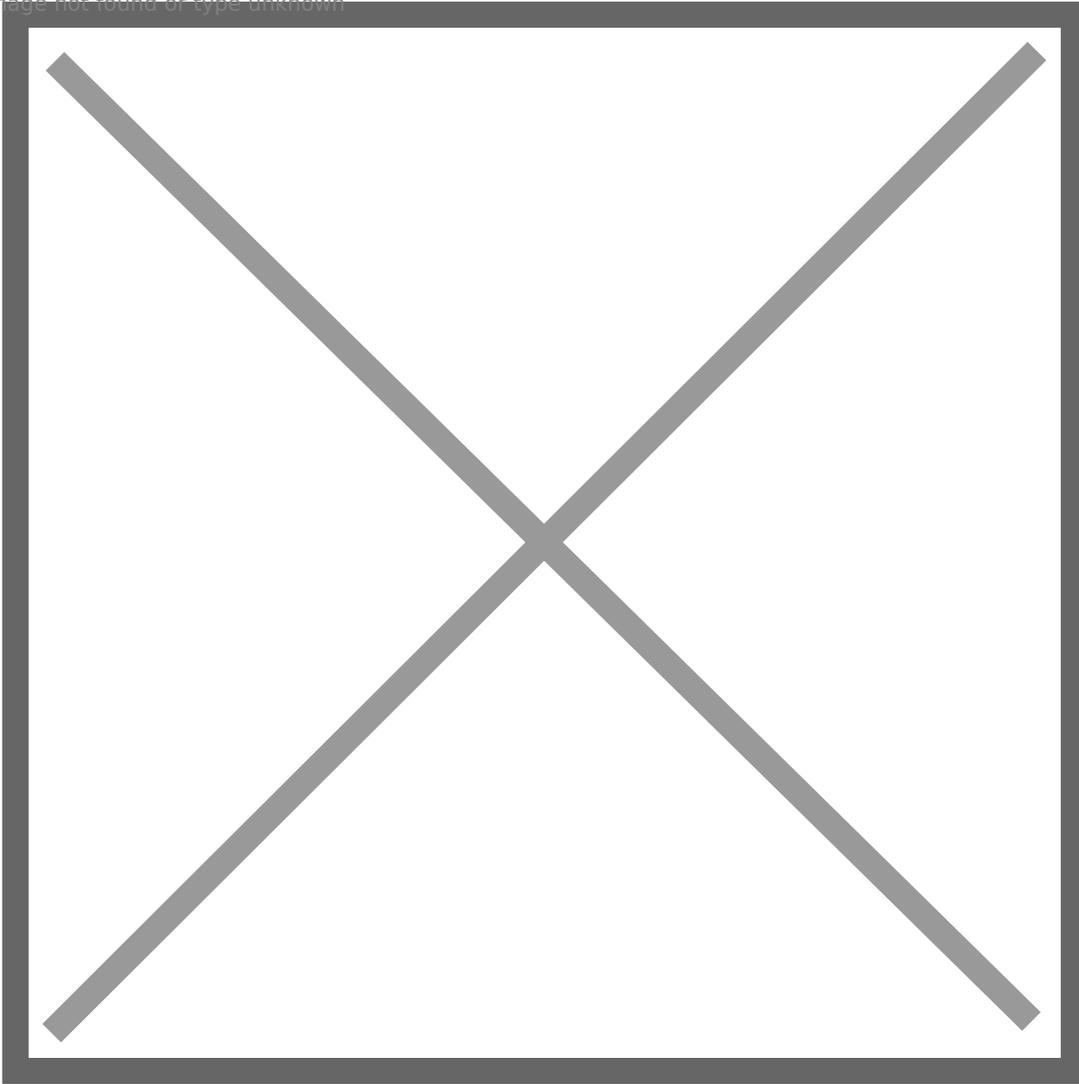
The "Enabled?" toggle is also useful if you wish to disable users

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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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