Update Users

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- How to Set Up a New User
- How to access the CMS

Summary

Use this screen to manage Users

Key to icons

Edit = edit

Delete = delete

> Deleting Users may have serious irreversible impact on your reporting, stock and allocation.

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

Permissions

User Type

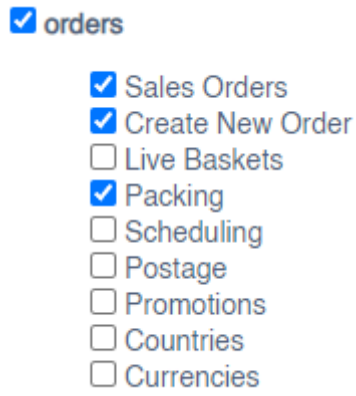
Toggle permissions for the user.

Field	Purpose

User Type	*Choose from:* • *superuser (ability to control other users, full access to CMS)* • *administrator (limited access to CMS)* • *store staff (access to POS only)*

Access Privileges

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



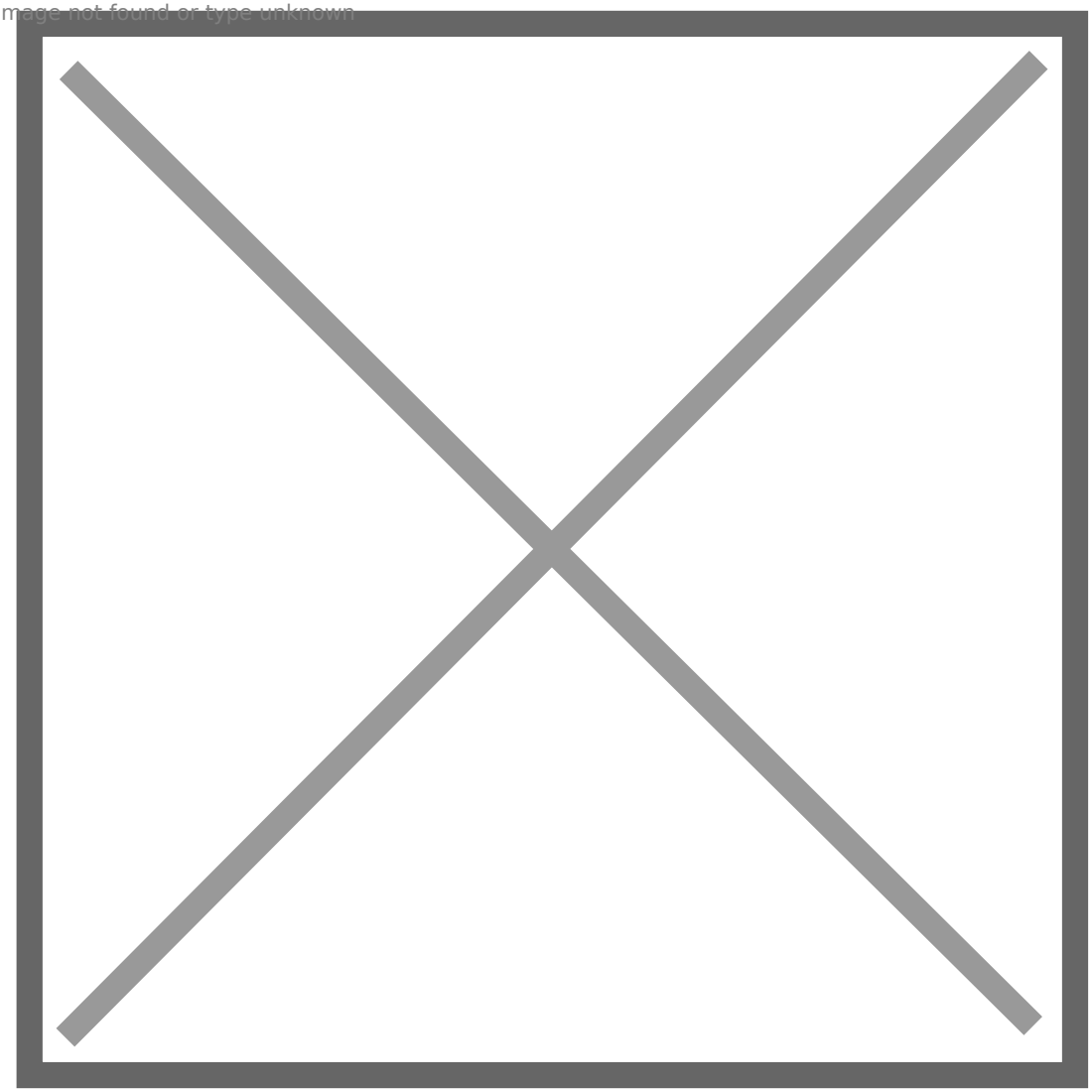
How to Set Up a New User

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.

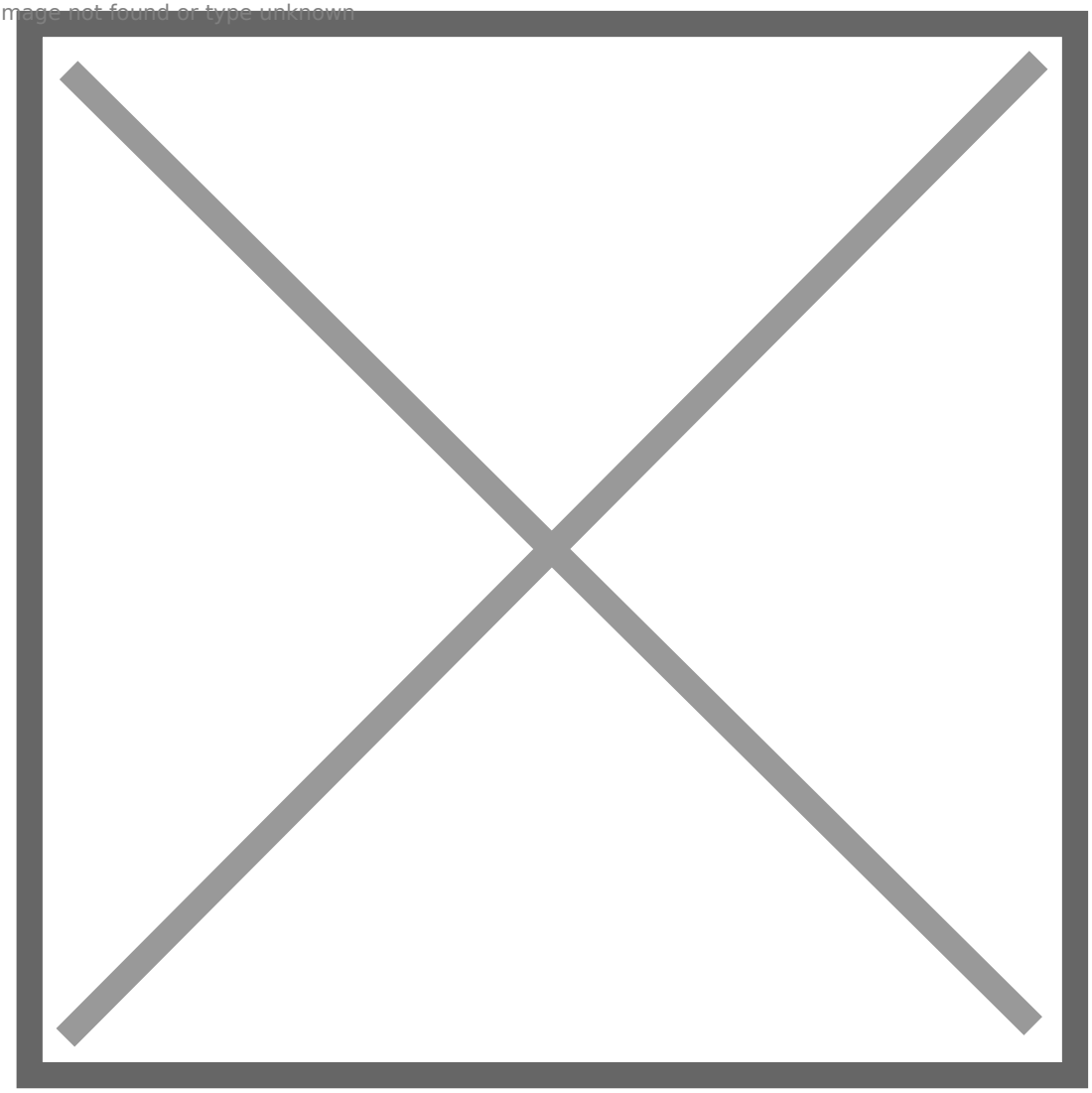
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3. You will see a list of all current users - Click "add a user".

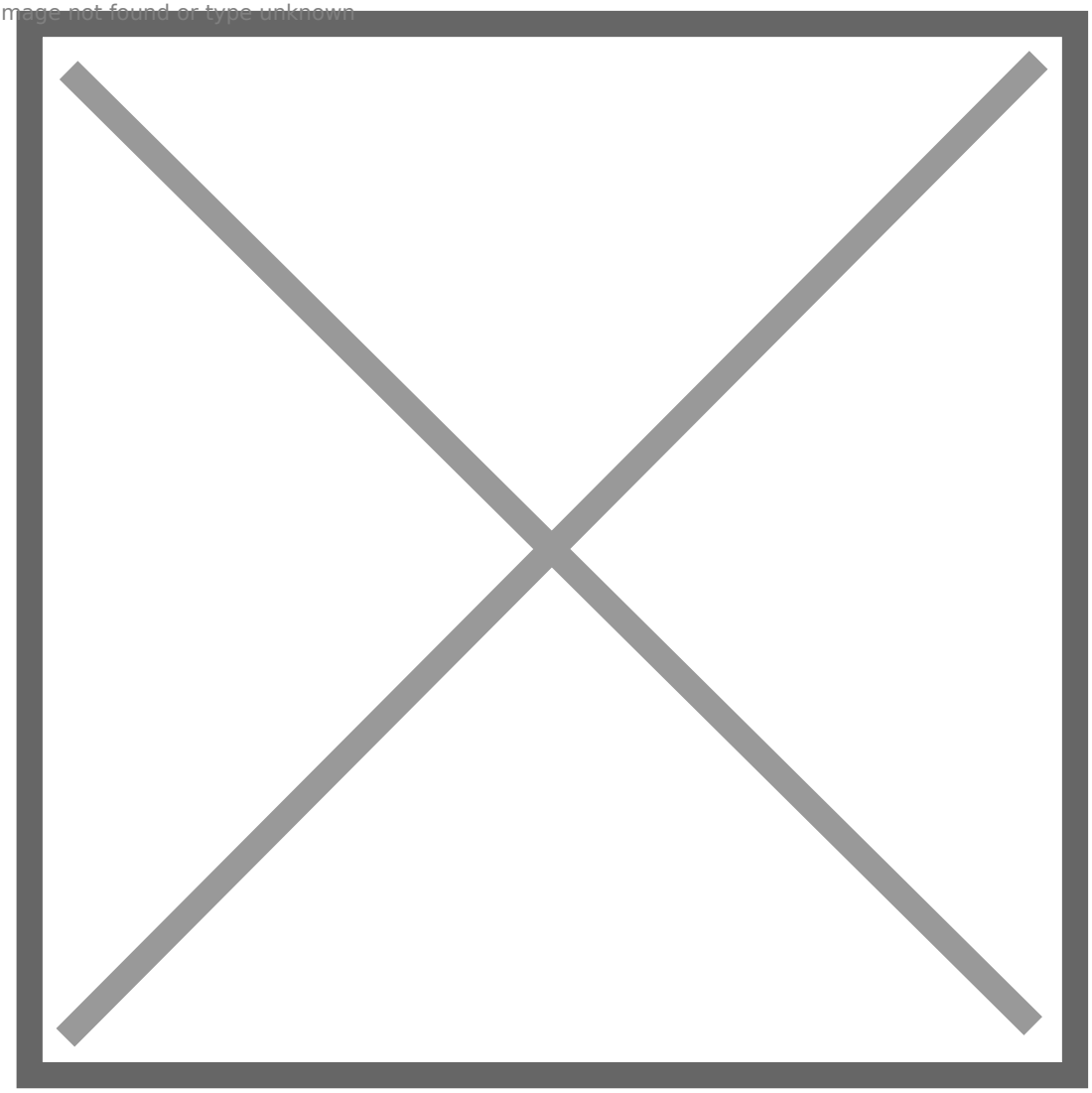
> Only a 'superuser' can add and change users.

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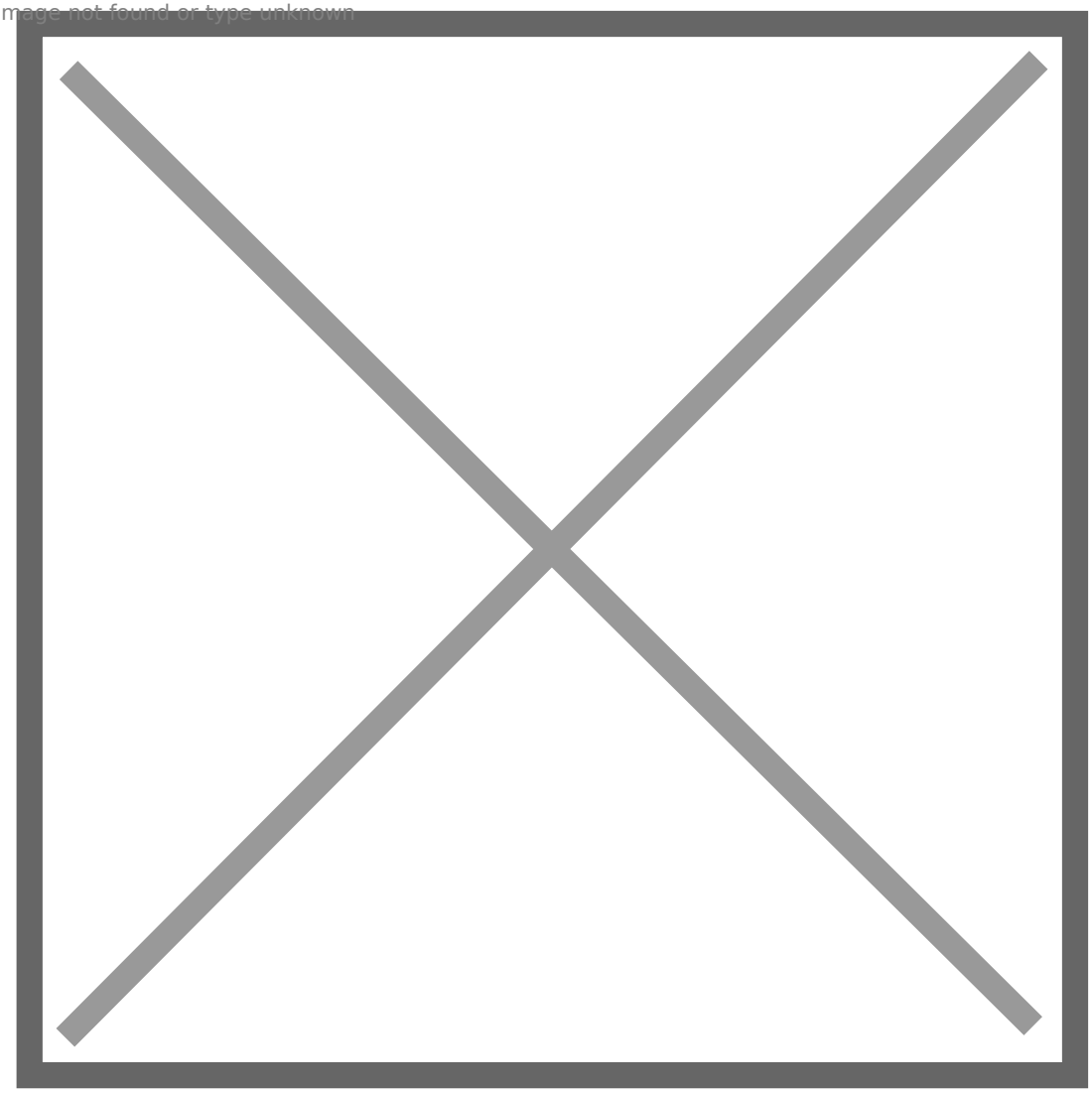
4. Enter the desired Username and Full Name, along with the appropriate email address.

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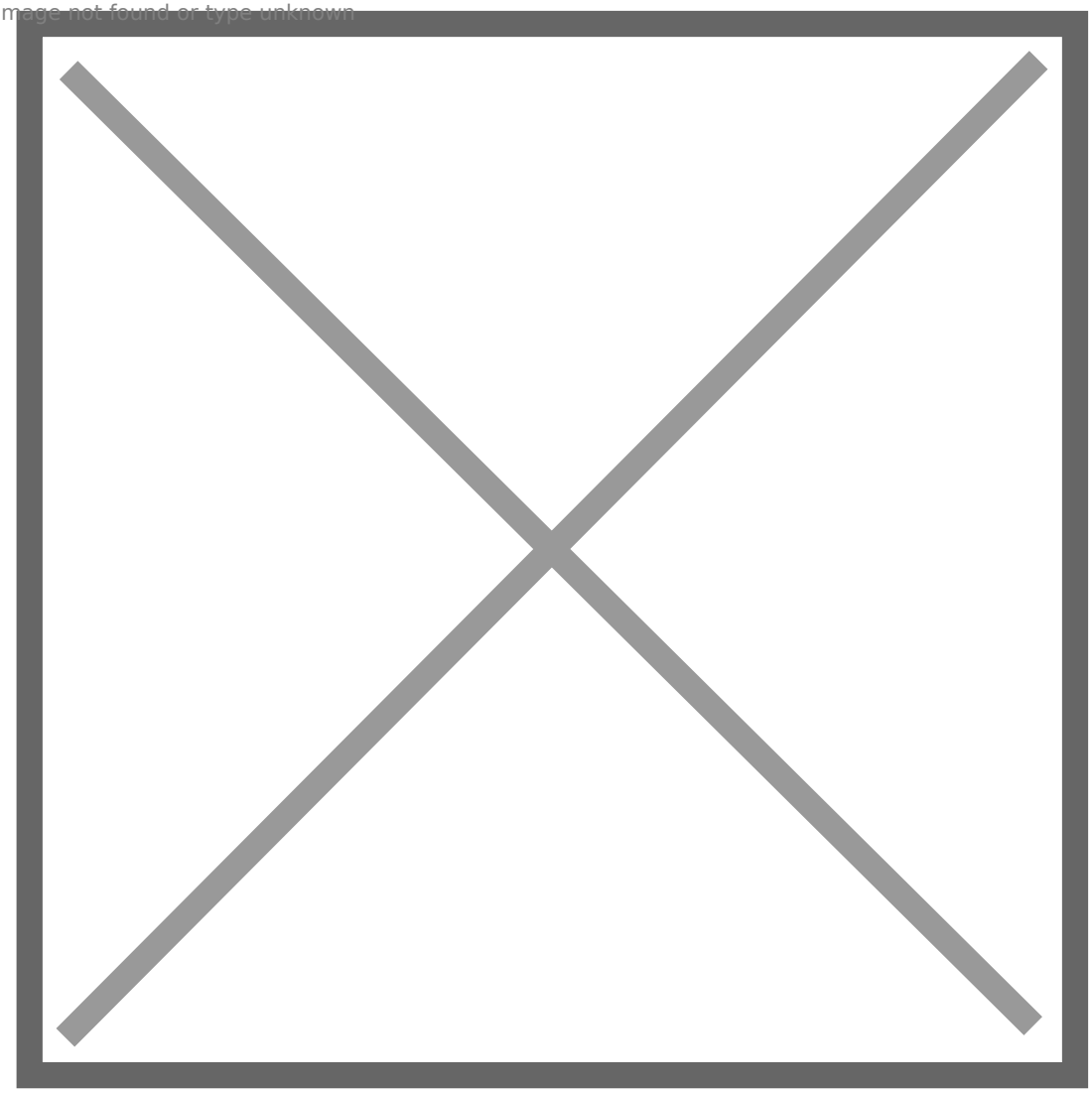
5. Select the appropriate User Type.

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6. Select the appropriate permissions.

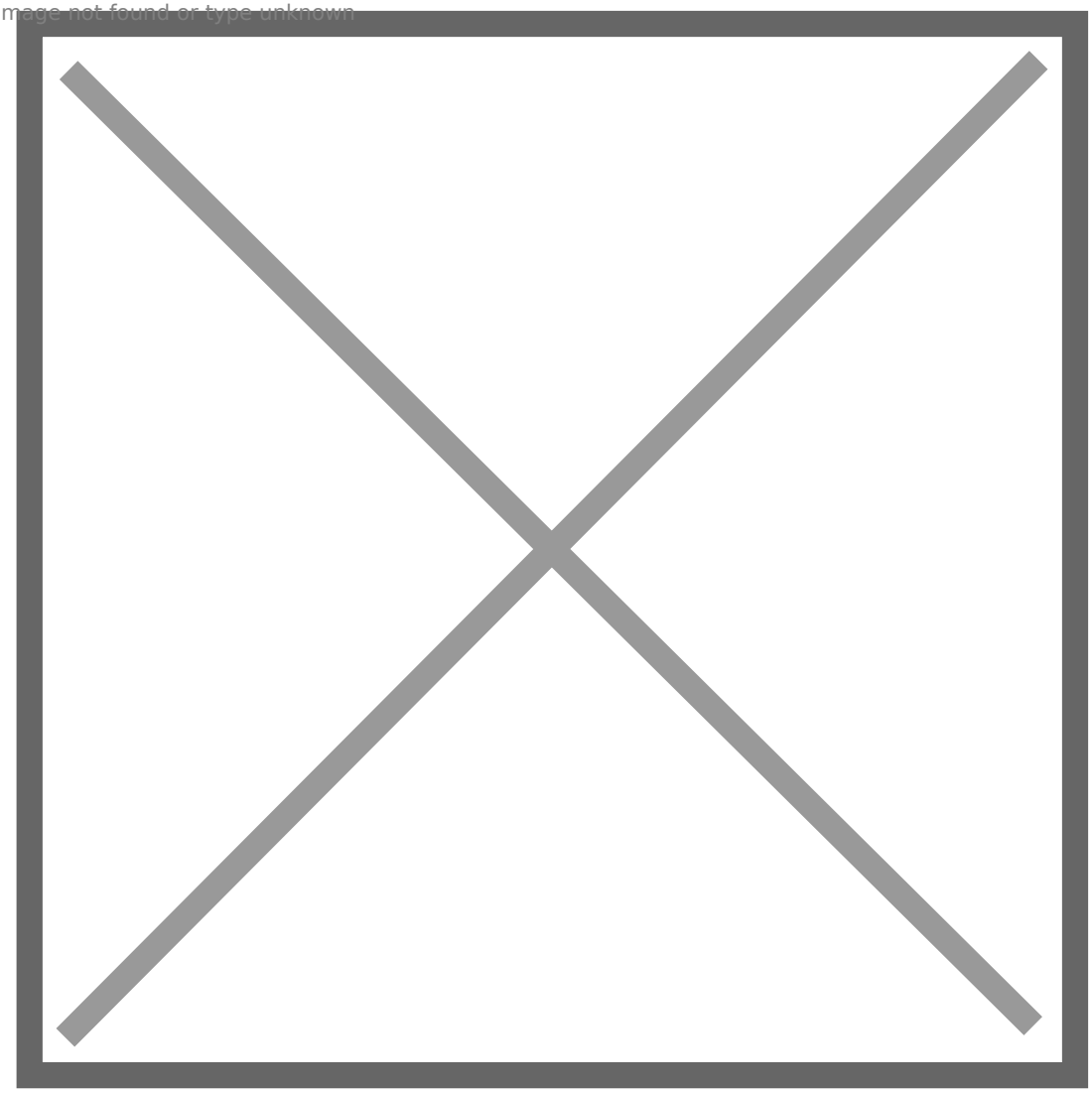
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7. Click the "Enabled?" toggle.

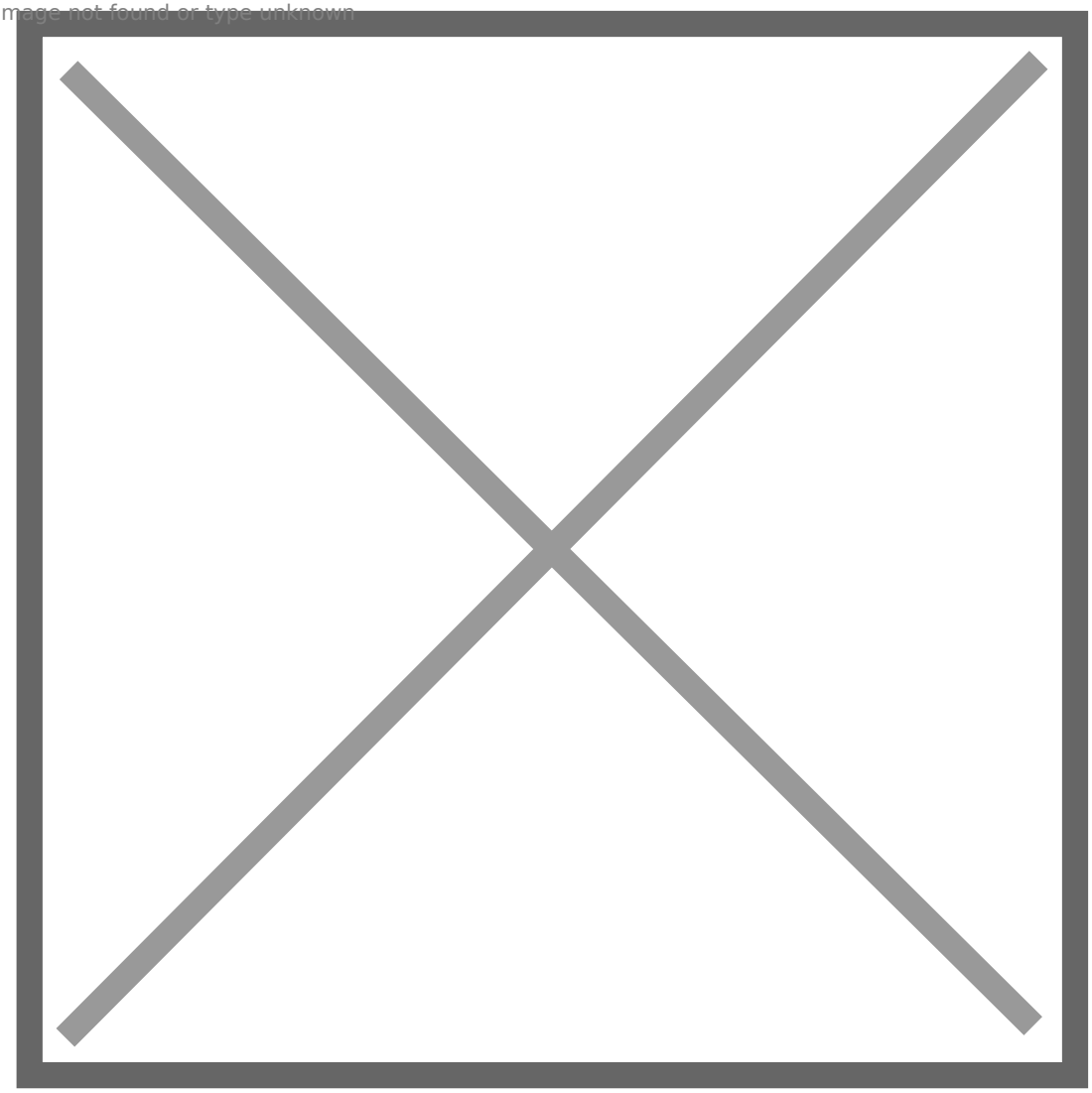
> The "Enabled?" toggle is also useful if you wish to disable users

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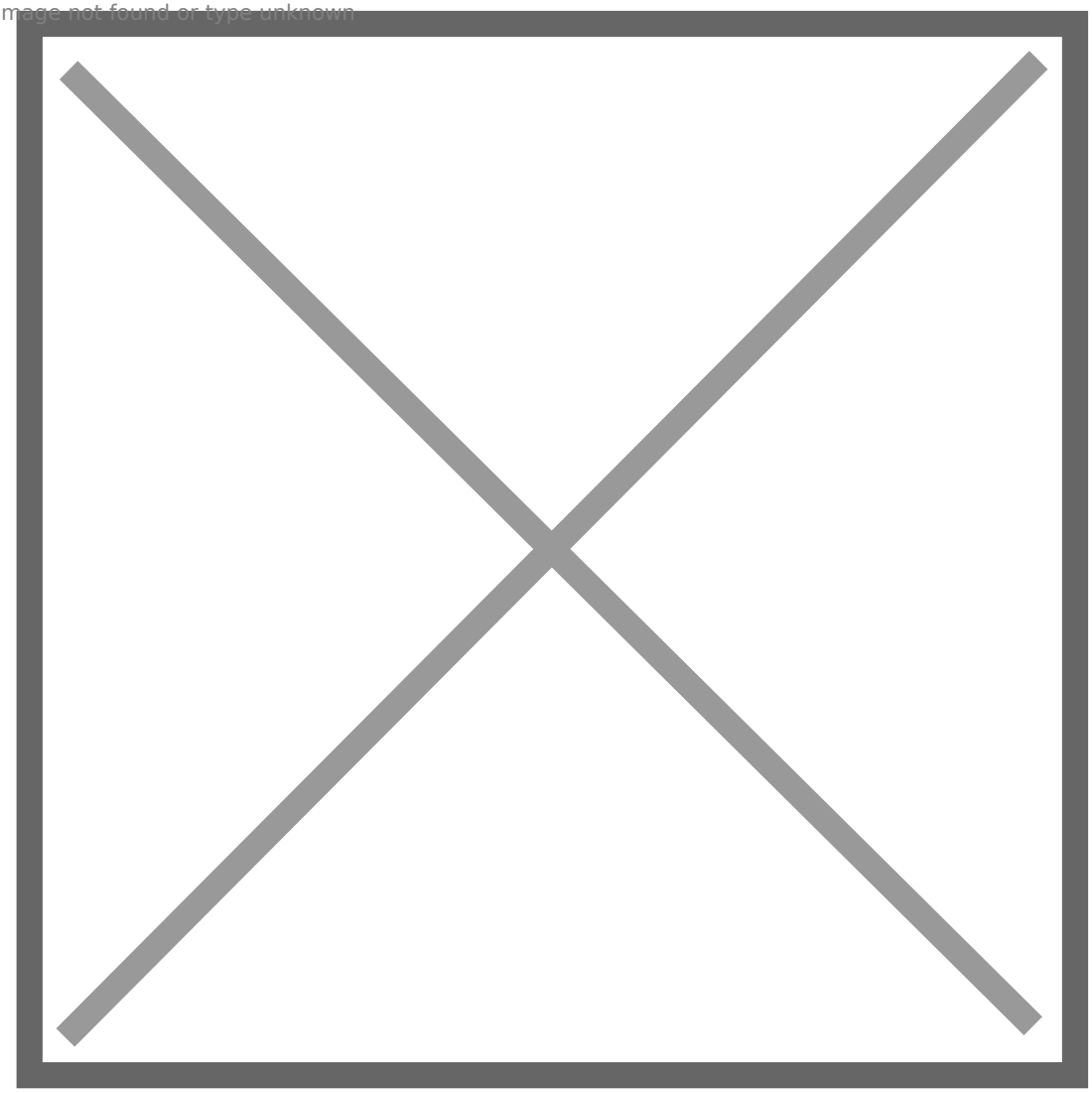
8. Create a new password.

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

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How to access the CMS

To access the CMS, you will need a User to be created. This is done via the Update Users screen by a Super User.

> The user must be 'enabled' for them to log in

Login via a Password

Your user will navigate to WWW.YOURDOMAIN.CO.UK/cms and enter their username and password.

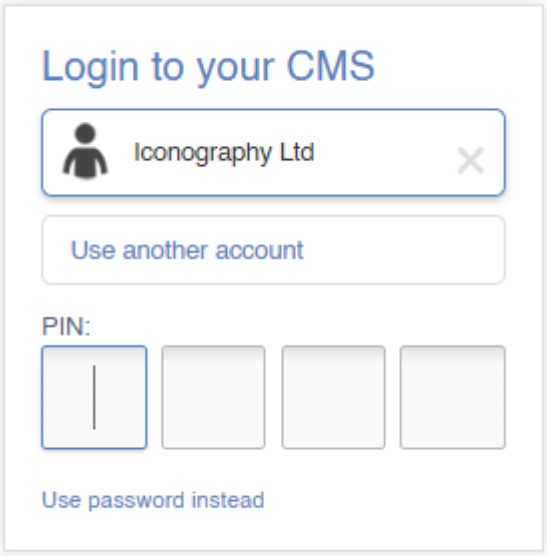
On first login, it is best practice for that use to immediately change their password and/or set up their pin.

This is done via the My Details screen.

Login via a Pin

From the My Details screen, it is also possible to set up a Pin (if the User has been granted permission to do so).

When logging into a Trusted Device, if a pin has been set, the user will be prompted to enter their pin, rather than their password.



Trusted Devices

A device will automatically be marked as trusted once a user has logged in via their CMS username/password for the first time.

This will expire every 30 days, and a user will have to log in properly again. Please not that on shared computers, it will not prompt the user to add a saved password.

> Trusted Devices do not override IP restrictions.