

Creating a client user account

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Creating a client user account is the same as creating an internal user except the company name selected will be theirs.

! Only internal users can create company records and require the Super User task Client Company Maintenance

1. Open the **Super User** menu
2. Click the **Create User** option to open the **New User** screen
3. Enter the **user name** they will be logging in with
4. Enter their **full name**
5. Enter their **password**, which must be 6 characters or more
6. Confirm their **password**
7. Optionally enter their **position** at their company
8. Optionally enter their **email address**
9. Select the company they belong to from the **Company Name** drop down list
10. Optionally supply their **phone** and **mobile** number
11. Click **Save** to continue to the **User Details** screen where you can assign roles and tasks

iCOSLIVE **New User**

User Name: **3**

Full Name: **4**

Password: **5** Medium

Confirm Password: **6** Medium

Position: **7**

E-mail: **8**

Company Name: **9**

Phone and Mobile: **10**

11 Save

Assigning client user roles and tasks

Assigning client user roles and tasks is the same as assigning them to an internal user, except their roles and tasks are different and depots do not need to be assigned.

1. Select the roles you wish to assign
2. click the role's **update** button to save your role changes
3. Select a role from the **role drop down** in the tasks panel
4. Check / Uncheck the **tasks** you wish to assign/ deassign
5. Click the Task's **update** button to save your task changes
6. Repeat steps 3 to 5 until you are done

icosLIVE **User Details** ✕

User Name: Full Name: e-mail: Position:

Company: Phone: Mobile: Depots:

Roles 1

- ☐ Financials
- ☐ Reporting
- ☒ Customer

Update 2

Tasks 3

Customer

- ☐ Bookings - Freight
- ☐ Bookings - Bulk
- ☐ Bookings - Container
- ☐ Bookings - Allow edit 4
- ☐ Bookings - Allow cancellation
- ☐ Bookings - HIAB
- ☐ Booking Entry - Show Rate Hints
- ☐ Booking Entry - Freight - Show Export

Update 5

- ☐ --- ALL ---
- ☐ STORAGE - HAMILTON
- ☐ STORAGE - WELLINGTON

Update

New User

Modify User

i Information on each client role and task can be found in the following articles

Preview