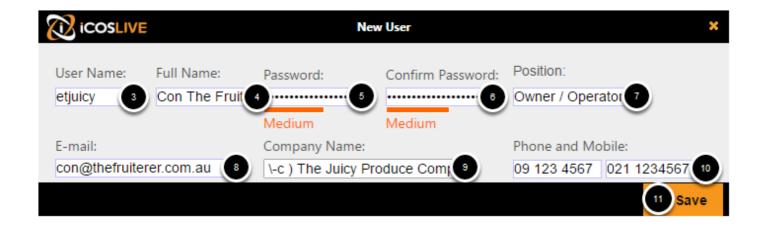
Creating a client user account

Modified on: Wed, 28 Nov, 2018 at 3:07 PM

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

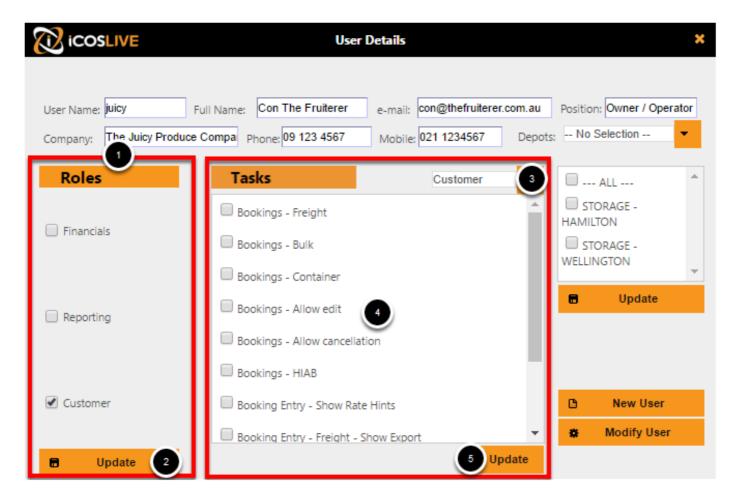
- 1. Open the Super User menu
- 2. Click the Create User option to open the New User screen
- 3. Enter the **user name** they will be logging in with
- 4. Enter their full name
- 5. Enter their password, which must be 6 characters or more
- 6. Confirm their password
- 7. Optionally enter their **position** 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



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



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

Preview