Adding Users and Assigning Roles

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Overview

Users are assigned a Role that defines their access level to your account. The number of *Active* users you can add is defined by your subscription.

Users

This feature allows administrators to add and remove users from their account, in real time.

To add a new user, click on the Gear icon on the top right side of the screen. Under the User & Roles category select Users.

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# Home	🛷 Sales	📺 Purchasing	Q ⁰ ₀ Production	🗑 Warehouse	🚓 Reports			
Create New	÷	Admin						Ian Benoliel Wednesday, August 9, 2017 Logo
Open Full List	~	General				Settings	Users & Roles	
Recent Record	ds	Import Profile Lists				Company Info Company Preferences	Relac Users	
 		Doc Status Alerts				Custom Fields Page Layouts	 Billing and Subscription 	
₩ 9055 # FLOWER123		ECommerce Integ Shipping Integrat Accounting Integr	ion			Email Templates Form Templates		

The User List shows you all users in the system and allows you to search for a specific user, using a number of different search terms by selecting the Search Field from the drop-down located at the top of your screen and then typing in the specific term in the search bar to the right.

- If you want to filter the content, change what columns are shown (the way data is organized on screen) or edit how many records are shown on the page/default search; click on the Gear icon located on the right side of the screen.
- If you want to Print your User list, click on the Printer icon
- To Export your User list to Excel via CSV file, click on the Export icon

To create a new User, click on the **+ Create User** icon, located on the right side of the screen.

Home 🧳 Sales	🐂 Purchasing	Q [©] Production	Warehouse	🔅 Reports		
eate New 👻	Admin > Users					
en Full List 🗸	Users					\$ 🕀
ent Records	Name	Ŧ	Search User	Q		New Us
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1001B:UOM TEST11	Ashely				0	8
11214A	Dania		Admin	dtriff@total-it.net	0	ß
18	DS				0	8
0	fab		GM	faberg@bellsouth.net	0	ß
7 29	Ian Benoliel		Admin	ianb@numbercruncher.com	0	8
8	James Dadoon		Admin	lanb@reorderpoint.com	0	8
aby Gourmet 44	Josh		Admin	joshb@numbercruncher.com	0	ß
	Keri		Admin	keri@numbercruncher.com	0	12
	Kim		Admin	kimk@numbercruncher.com	0	6
	Rafael Lagos		Admin	rafael@numbercruncher.com	0	8

Creating a User

The New User Screen is divided into 3 categories: General, Address and Other.

- The General area of creating a new user allows you to enter the user's Name, Email, and the User's Role.
 - Name: Name is required and it must be unique
 - Email: This is a required field.
 - To Edit a Role, click on Manage Roles
- The Address area allows you to enter the location of the new user.
 - Select the Country.
 - Select Time Zone.
 - If the user's location is the same as the company, do not use the Time Zone setting.
 - Special attention must be given to this setting, if your user does not work at the same location and time as your company, you must set the user's location and time parameters. Setting modifies, per user, the company's established time zone to the user's time zone.
- Inside the Other area of the New User setting, Admins can:
 - Select if the User is Active
 - Select if the User is Locked
 - What Location the new User works at
 - If the user will be using several locations, use the control key (Ctrl) to select other locations
 - The user will have visibility to the selected locations only
 - What Sales Rep is associated with the New User.
 - If the User is a Sales Rep you can assign them to the customer from the Sales Reps listing.
 - You can select multiple customer/vendors, use the control key (Ctrl) to select more than one.
 - The Sales Rep will have visibility to all sales order transactions (i.e. Sales Orders, ShipDocs etc)
 - The Sales Rep will be able to view the Sales Order transactions to those customers selected from the listing.

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Create New	Ŧ	Admin → Users → Us	er								Save Cancel
Open Full List	Ŧ	General				Address		o	ther		
Recent Records		Name				Name/Company	All Orders Demo		Active	z	
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# 01001B:UOM TE	EST11	First Name				Floor/Suite			Locations	HQ	
# 01214A		MJ				Care of				CHINA	
718		Last Name				City				TEXAS	
		Email				State/Prov./Reg.				Drop Ship	*
0 129		Role			*	Zip/Postal code			Sales Reps	Moe House Distributors	<u>^</u>
Ø 48			Manage Roles			Country		•		Cardio Access Inc X	
🋔 Baby Gourmet 4	44	Position	-							Cid and Son Garden Nursery	
						Time Zone	*			York International Corporation	*

To replace a user, first make the replaced user inactive then add the new user. To make the user inactive, see that section of the article below.

Passwords

After a new user gets created, click the Reset Password button to send the user an email with a reset password link. Clicking the link will prompt the user to create their own secure password, for future access.

If the user forgets their password, the following options are available to reset a password:

- Users can request to reset their password from the main login screen, by clicking on*forgot password*, which will send the user a system generated email with a password reset link.
- Contact the company's system administrator. The administrator will have access to the user's roles and password administration.
 - To Change Password or Reset Password, click on the Gear icon on the top right corner of the screen.
 - Under User & Roles, click on **Users**. Type the user's name in the **Search User** box. Press enter.
 - Under **Actions**, click on the edit notepad icon. The user's information screen will be displayed.
 - Click on Change Password. Type a password, and confirm the password in the Confirm password.
 - Click Save when done.

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# Home 🏘 Sales	🐂 Purchasing	Q [®] Production	😧 Warehouse	🚓 Reports							
Create New 🚽	Admin > Users > Us	er									
Open Full List 🚽	< Josh							Change Password	Reset Password	Save Ca	ncel
Recent Records	General				Address		Other			·	
	Name	Josh			Name/Company		Active	2			
3954	Mr./Ms./				Street		Locked				
▲ 3015 ₩ 9055	First Name	Josh			Floor/Suite		Locations	HQ			
FLOWER123	MJ				Care of			CHINA			
♥ 712	Last Name	Parman			City			TEXAS			
# FLOWER123-A	Email				State/Prov./Reg.			Drop Ship		-	
🛔 All American Business Ent		joshb@numbercruncher.	com				Sales Reps	Moe House Distributors			
90097907		Admin		*	Zip/Postal code			Cardio Access Inc X			
B30P		Manage Roles			Country	٣		Cid and Son Garden Nurser	у		
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Changing a User's Email Address

The first step in changing a user's email is to head towards the admin page by clicking your company name at the top right of the window, then entering the user menu.

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🖷 Home 🛷 Sales	🐂 Purchasing 🔅 Production 🛷 Repairs 📦 Wareho	use 🔮 Reports	
Create New 🐰	Admin		lorne Benoliel Monday, October 30, 2023
Open Full List 🚽	General	Settings	Users & Roles
Recent Records ● 15 ● 15 ■ 51 Standard Armor set ● 25 ▲ Bob Barker ■ ASB3-800 △ Customer Addresses ○ Pivot Report	Import Profile Lists Loc.Status Alerts Ecommerce Integration Shipping Integration Shipping Integration Label Pristing EOI Integration KEST Ag ESE Sustomer Portats BES Vacioner Portats Merce Ageport Logen Express 113/0223 4400 PM	Company Inferences Company Inferences Custom Fields Page Layouts Email Templates Form Templates Label Templates Domain Verification	Roles Users Billing and Subscription

Once on the user menu page click the edit icon next to the user you would like to change.

OrderTime	Search		Q				Compu-center Logout
# Home 🏼 🋷 Sales	🐂 Purchasing	O [®] Production	🛷 Repairs	🗑 Warehouse	🖨 Reports		
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15	NAME -		ROLE	EMAI	L	ACTIVE	ACTIONS
₽ 17	lan		Admin	lan@	ordertime.com	0	ß
Standard Armor set	Jason		Admin	jason	@numbercruncher.com	0	ß
₽ 25	Iorne Benoliel		Admin	lorne	@ordertime.com	0	ß
Bob Barker	The sherpa		Admin	micha	ael@ordertime.com	0	8
ASB33-BSM ASB33-BO					Total Records: 4		
Customer Addresses							
Pivot Report							

In the user editing page you are free to change the email. Once done remember to hit**save** in the top right.

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ecent Records	General			Address		Other	
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Standard Armor set		jason		Floor/Suite		Locations filter	HQ
25	M.I			Care of			Warehouse
Bob Barker ASB33-BSM	Last Name	swan		City			Retail store #100
ASB33-BO	Email	jason@numbercruncher.c	om	State/Prov./Reg.			
Customer Addresses	Phone			Zip/Postal code		Sales Reps filter	
Pivot Report	Role	Admin	~	Country	~		
		Aanage Roles		Time Zone	~	Sales Rep for	~
		romote to Master Admin				Alerts	÷
		trainer					
	Cell Phone						
	Cell Phone Carrier	None	~				
					ser's Edit Page unless tl different user first and		

email of that user. Or you can create a new user with the email you want to use for the Master Admin and then switch the Master Admin Role to that new user. We don't allow the direct modification of the Master Admin email address for security purposes, and to protect your account from being compromised.

If your email address is associated with multiple Order Time accounts you will not be able to change your email address in the Users section. This is to protect every single one of your accounts from being compromised in the case of a phishing attack. If you need to change your email address and it is locked to multiple company files, **please contact support** and we will assist you.

Making a user inactive

Making a user inactive is very similar to the previous section on changing a user's email address, with the only real difference being that you uncheck the box called **active** instead of changing an email address. You still have to click **save** once you uncheck the box.

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Create New 👻	Admin > Users > Us Click to ma	er Inage users.					Cha	nge Password Reset Password Save	Cano
	General				Address		Other		
cent Records	Name	lason			Name/Company	compu-center	Active	1	
15	Mr./Ms./				Street		Locked		
7 itandard Armor set	First Name	jason			Floor/Suite		Disable 2FA		
5	MJ	100000			Care of		Locations niter	HQ Warehouse	
ob Barker	Last Name	swan			City			Warehouse Retail store #100	
SB33-BSM	Email	jason@numbercruncher.co		_	State/Prov./Reg.			Retail Store # 100	
SB33-BO	Phone	jason@numbercruncher.co	m		Zip/Postal code		Sales Reps filter		
ustomer Addresses ivot Report	Role	Admin			Country		sales keps litter		
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