Website User Maintenance for Account Admins

Only website users that are enabled as an Account Administrator can create new users for that Customer account.

Overview

This provides a guide to creating new website users while logged into the website as Website Administrator or the User Maintenance page accessed through the dashboard for non-website administrator roles. **NOTE -** A user still has to be enabled as an Account Administator to create new users on that account, whether staff or customers. New website users can also be created in the CMS by staff who are CMS administrators.

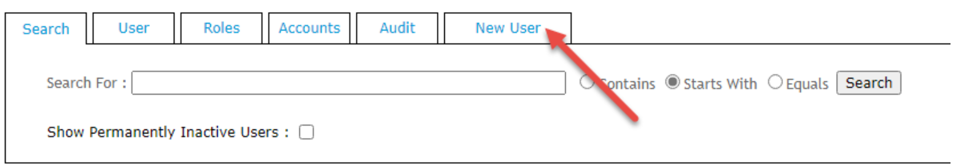
When creating a user, ensure the user has the following:

- a unique login (normally in the form of an email address).
- association with an ERP Debtor Code.
- access to many Debtor Codes or be associated with just one.
  - e.g., a branch manager will access one code, a national manager will access all codes, etc (can be configured as wildcards).
- assignment of a Role (or even multiple Roles).
- various settings applied (Order dollar limits, who approves orders, etc).

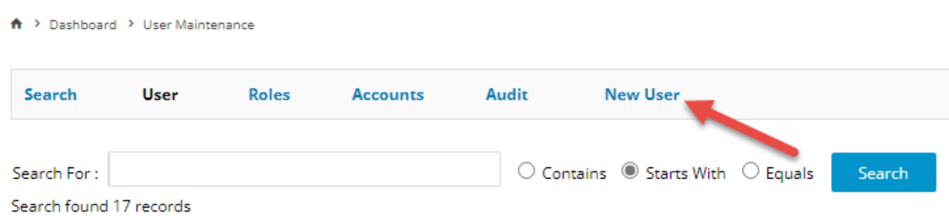
Step-by-step guide

To create a new website user:

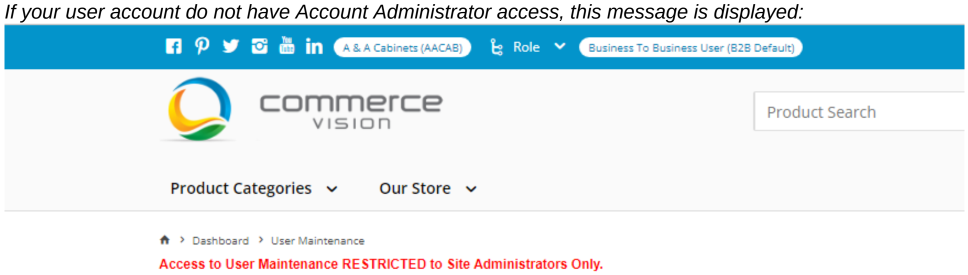
1. *If you're Website Administrator, navigate to **Advanced User**, then click **New User**.*



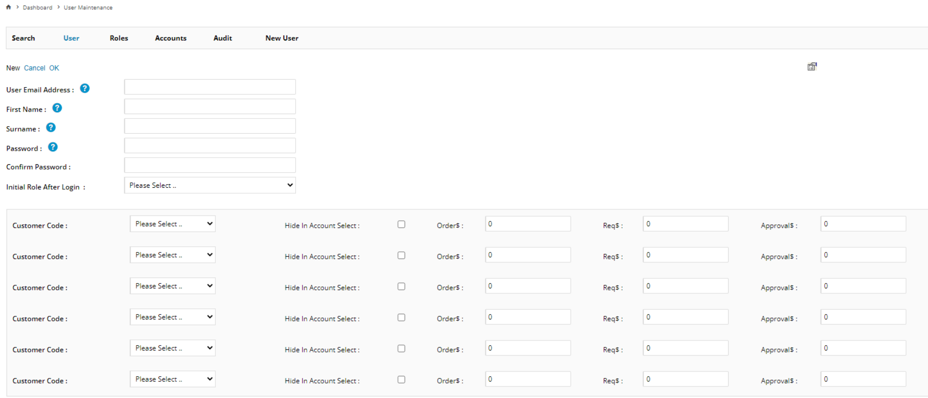
*If you are a non-Website Administrator role with Account Administrator acccess, navigate to **Dashboard User Maintenance**, then click **New User**. (**NOTE -** this page is available only if it has been added to Dashboard. See: Add a New Menu Item.)*



If your user account do not have Account Administrator access, this message is displayed:



2. Enter the new user's details.



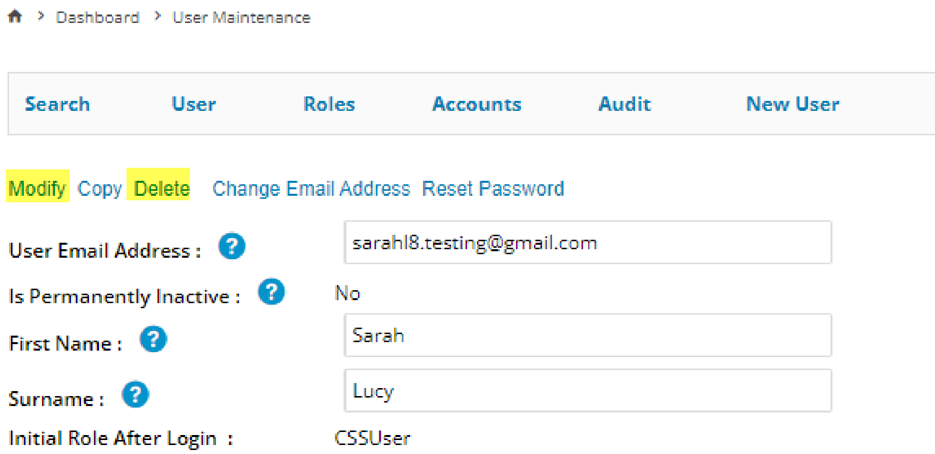
Field Name	**Description**
User Email Address	The user's email address. This will also be the user's login/ID.
First Name	The user's first name.
Surname	The user's surname.
Password	The user's initial password.
Confirm Password	The user's initial password (repeated).
Initial Role After Login	The role the user will operate on once they have successfully logged in.
Customer Code	The account the user is associated with. There can be more than one customer account.
Deactivate User Account	(Not displayed with Dashboard access.) When ticked, the user's account is disabled. Disabled users cannot log in.
Hide in Account Select	When ticked, if the user is associated with more than one account, they cannot switch to this customer account when the user is logged in.
Order Limit	The upper limit dollar amount the user is permitted per order.
Requisition Limit	The upper limit dollar amount the user can request for approval on this account.
Approval Limit	(Applies only if the Customer uses order approvals.) The upper limit dollar amount the user can approve on this account.
Orders Approved By	(Not displayed with Dashboard access.) When the user places orders exceeding their Order Limit, this is the user who should approve those orders.
Account Administrator	(Not typically displayed with Dashboard access.) When ticked, grants access to 'Advanced/Extra User Maintenance' on the Administrator's role. Account Administrators are able to set up and maintain other users.

3. To save the user, click **OK**.

To edit or delete a user:

1. Navigate to **User Maintenance** (/zUsers.aspx).
2. Find the user with the Search tool, then click on the radio button next to their login ID.

3. *Depending on what you want to do, click **Modify** or **Delete**.*



> There is a system setting to toggle whether a confirmation is requested when deleting a user. This setting is called '**Show Confirm On Grid Delete/Remove**' and is found under the '**General'** Tab in '**Settings'** (/zSettings.aspx).

Related help

- MS Active Directory Setup Guide
- Microsoft Azure AD SSO
- Users & Roles
- CMS Users
- Website Users