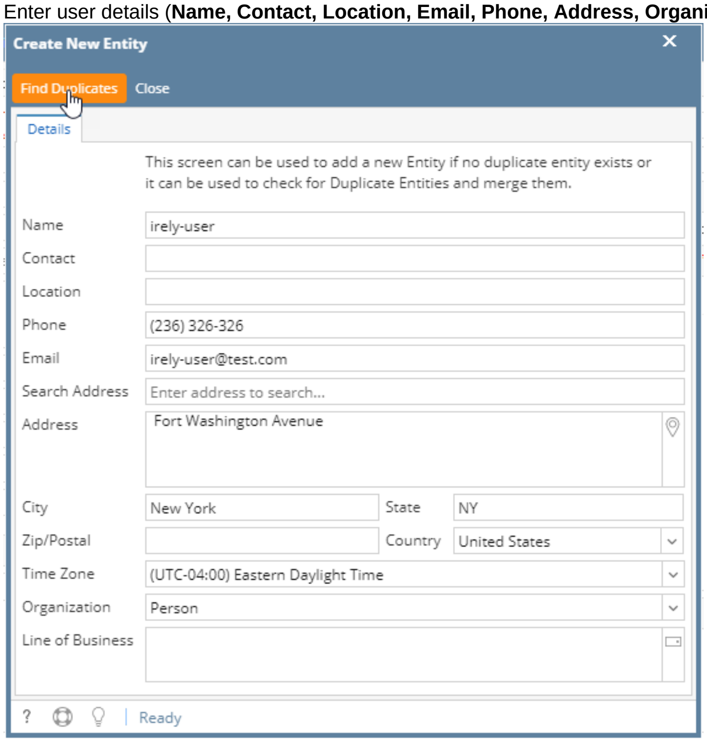
How to Add New User through Users screen

Administrator users can create a non-origin user if Origin Integration is disabled on Company Configuration screen.

NOTE: Make sure origin integration is disabled on **Company Configuration**, otherwise, creation of new users will not be allowed.

Here are the steps on how to create a new user:

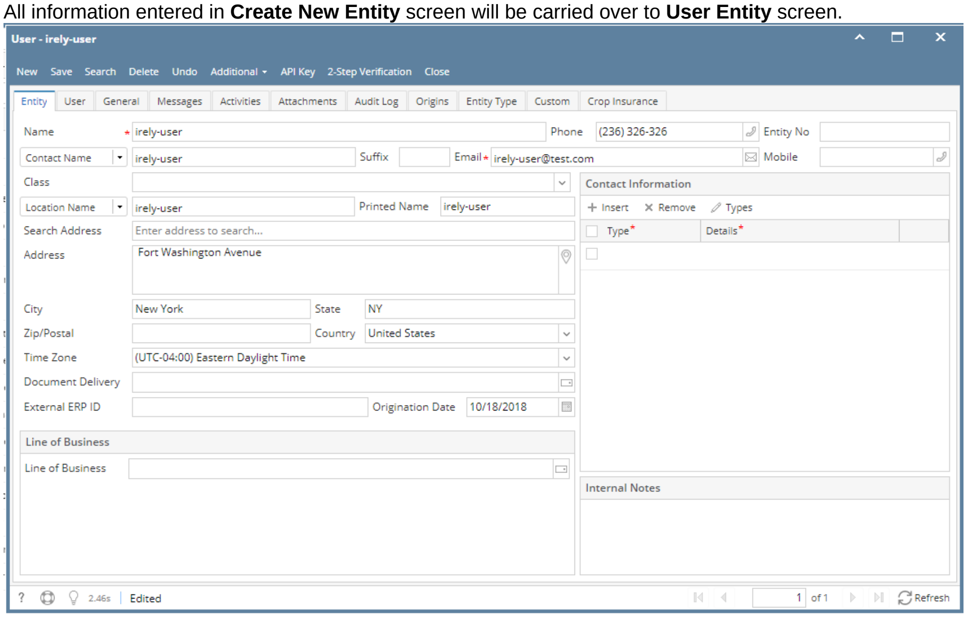
1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Users**
3. On Search **User Entity** screen, click **New** button. **Create New Entity** screen will appear
4. Enter user details (**Name, Contact, Location, Email, Phone, Address, Organization and Line of Business).**



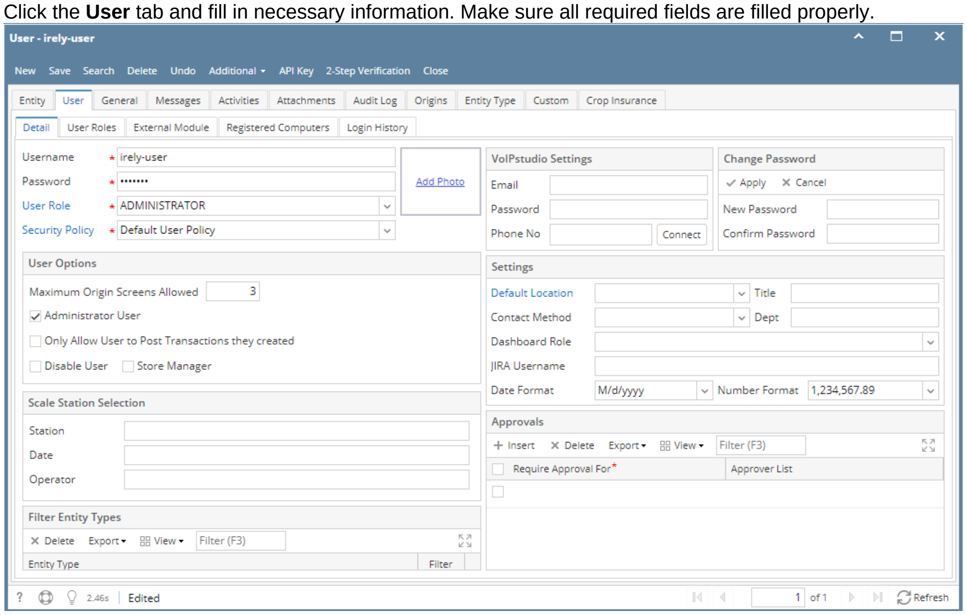
Field	Description
Name	Name of user entity
Contact	Default contact name
Location	Default location name
Phone	Phone number of default contact
Search Address	Enter partial or full address then select from the result, the following fields will automatically be filled: **City, State, Zip/Postal, Country, Time Zone**
Organization	**Person** - Name will be automatically copied to Contact and Location **Company** - Contact and Location will be different from the name

5. Click **Find Duplicates** button to open the **Duplicate Entities** screen. Duplicate Entities screen displays the list of entities that might be a duplicate of the current entity you are creating
    a. If there is no duplicate or you still want to create the entity, click the **Add** button
    b. Otherwise, you can merge existing entities. See How to Merge Duplicate Entities for the instructions

6. All information entered in **Create New Entity** screen will be carried over to **User Entity** screen.



7. Click the **User** tab and fill in necessary information. Make sure all required fields are filled properly.



Required fields on Entity tab:

- Name
- Contact Name
- Location Name
- Email

Required fields on User tab:

- Username
- Password
- User Role
- Security Policy

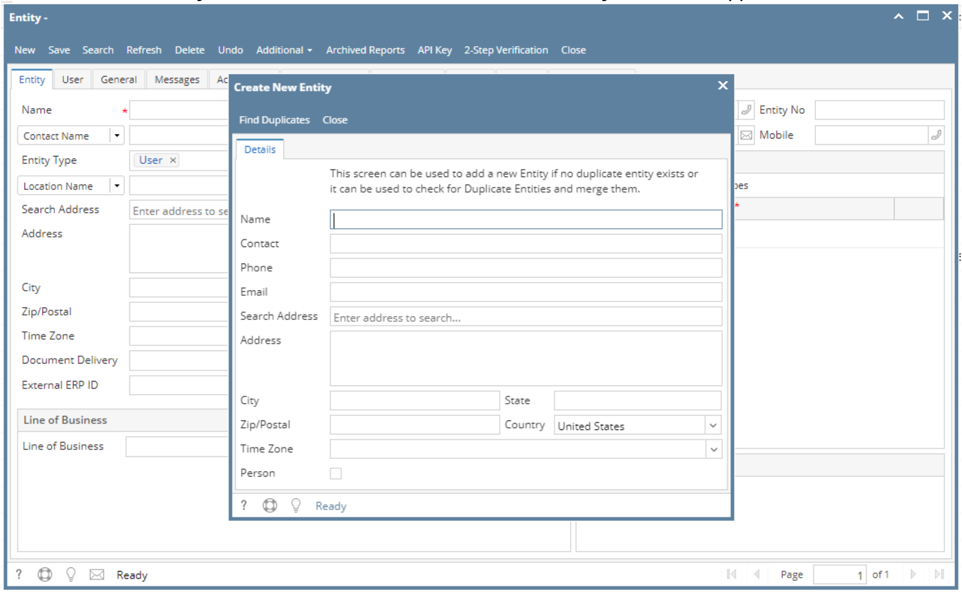
8. Click the **Save** button. New user will be created.

Notes:

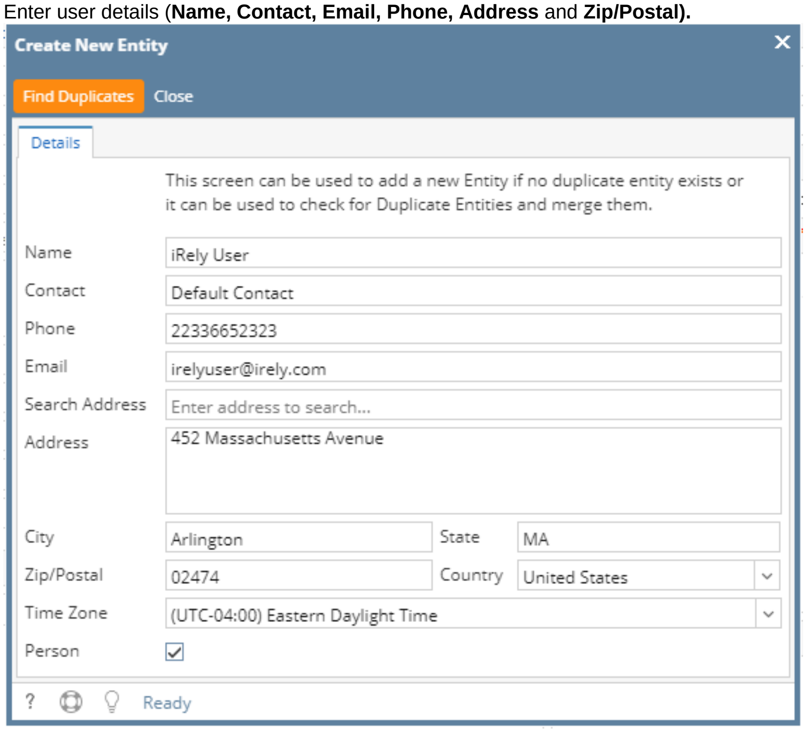
1. If the maximum number of users stated in the license has already been reached, this message will appear when trying to save "You have reached the maximum number of allowed users". It will not be allowed to save.
2. If the maximum number of administrator stated in the license has already been reached, this message will appear when trying to save "Cannot save. Maximum number of allowed Administrators reached.". It will not be allowed to save.

Here are the steps on how to create a new user:

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Users**
3. On Search **User Entity** screen, click **New** button. **Create New Entity** screen will appear



4. Enter user details (**Name, Contact, Email, Phone, Address** and **Zip/Postal).**

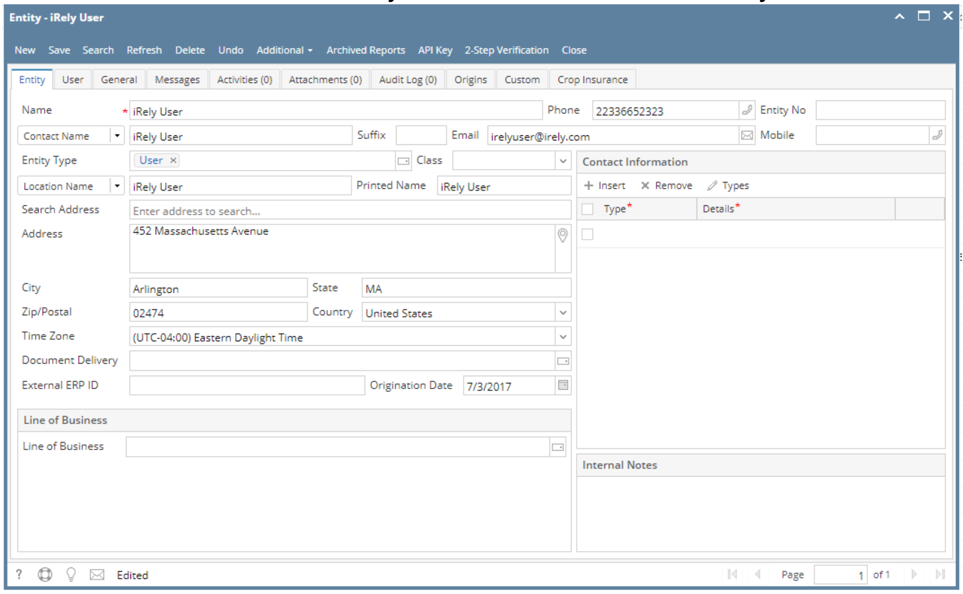


Field	Description
Name	Name of user entity
Contact	Default contact name
Phone	Phone number of default contact
Search Address	Enter partial or full address then select from the result, the following fields will automatically be filled: **City, State, Zip/Postal, Country, Time Zone**
Person	If checked, the entity is a person If unchecked, the entity is a company

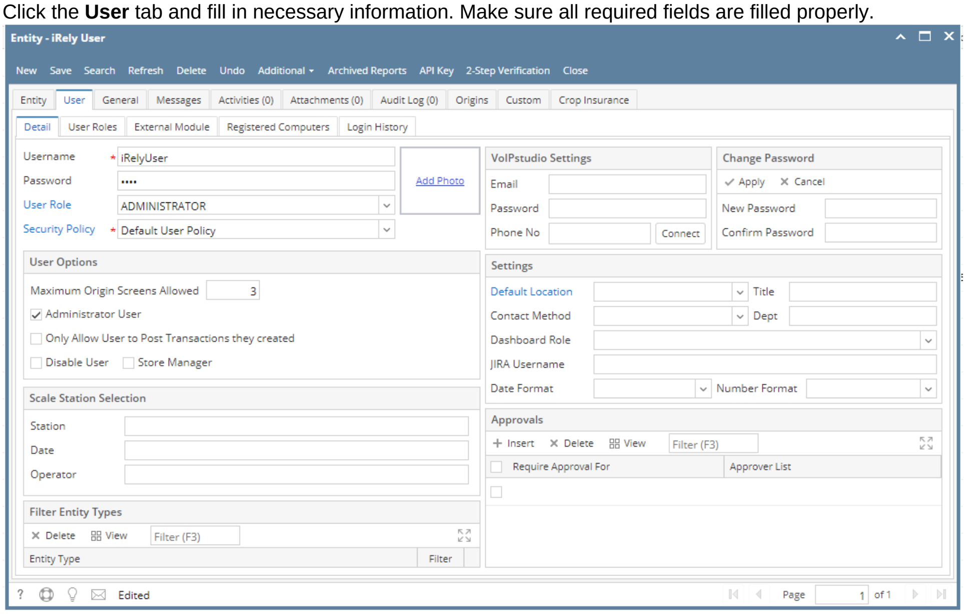
5. Click **Find Duplicates** button to open the **Duplicate Entities** screen. Duplicate Entities screen displays the list of entities that might be a duplicate of the current entity you are creating
    a. If there is no duplicate or you still want to create the entity, click the **Add** button

b. Otherwise, you can merge existing entities. See How to Merge Duplicate Entities for the instructions

6. All information entered in **Create New Entity** screen will be carried over to **User Entity** screen.



7. Click the **User** tab and fill in necessary information. Make sure all required fields are filled properly.



Entity tab:

1. Name

2. Contact Name

3. Location Name

4. Email

User tab:

5. Username

6. Password

7. User Role

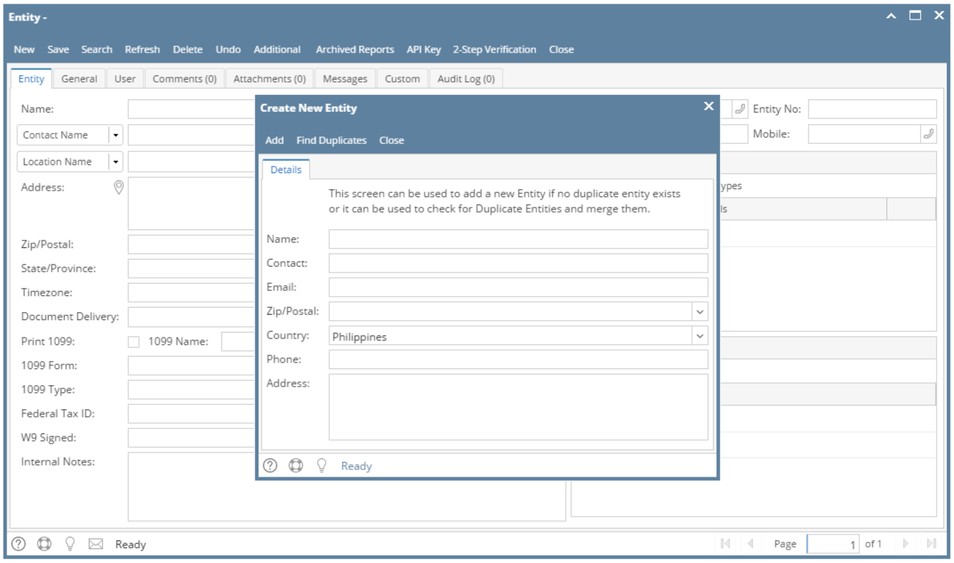
8. Security Policy

8. Click the **Save** button. New user will be created.

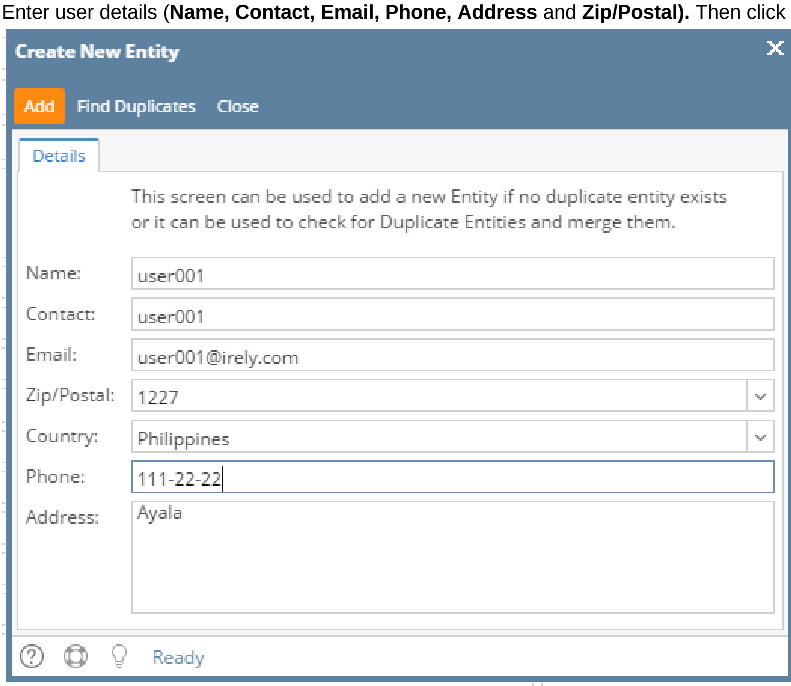
Here are the steps on how to create a new user:

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Users**

3. On Search **User Entity** screen, click **New** button. **Create New Entity** screen will appear

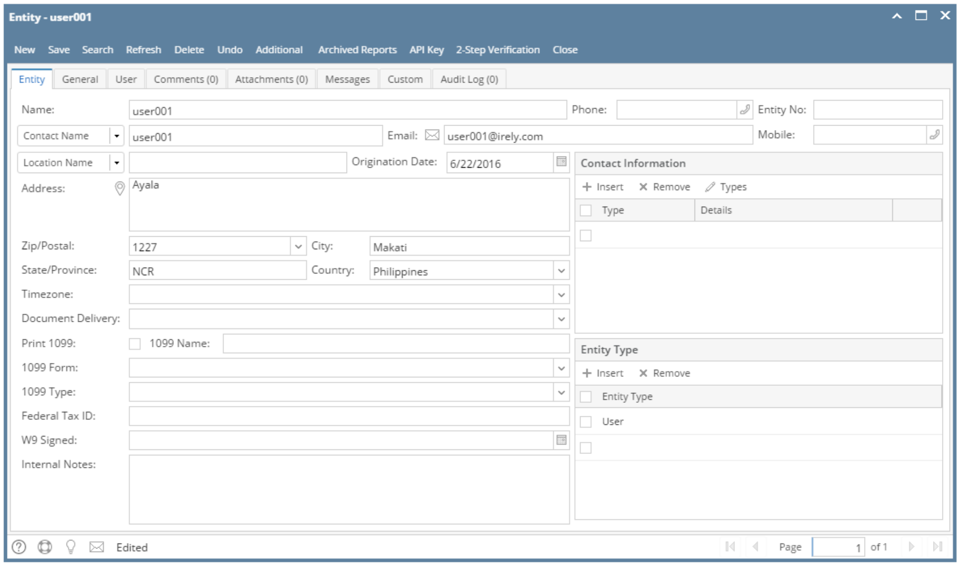


4. Enter user details (**Name, Contact, Email, Phone, Address** and **Zip/Postal).** Then click **Add** button.

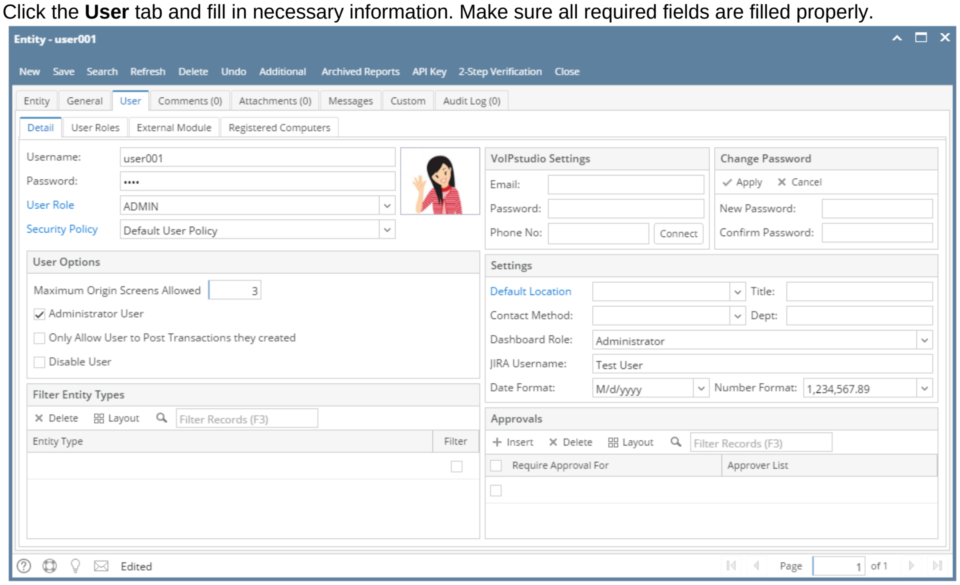


*Optionally, user may skip this part and click **Close** button to move to User Entity screen.*

5. All information entered in **Create New Entity** screen will be carried over to **User Entity** screen.



6. Click the **User** tab and fill in necessary information. Make sure all required fields are filled properly.



Entity tab:

1. Name

2. Contact Name

3. Location Name

4. Timezone

User tab:

5. Username

6. Password

7. User Role

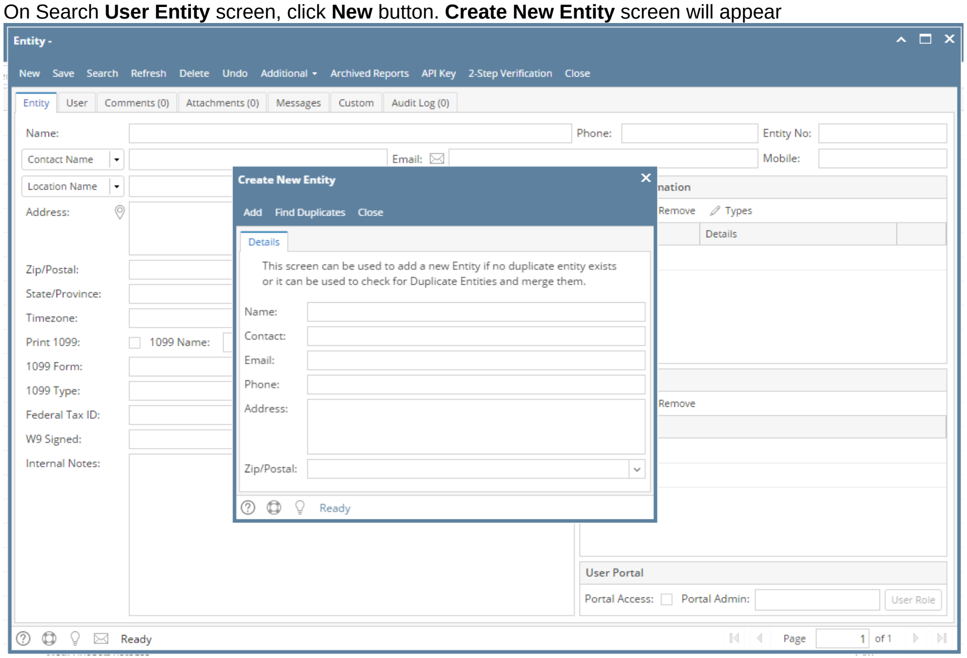
8. Security Policy

7. Click the **Save** button. New user will be created.

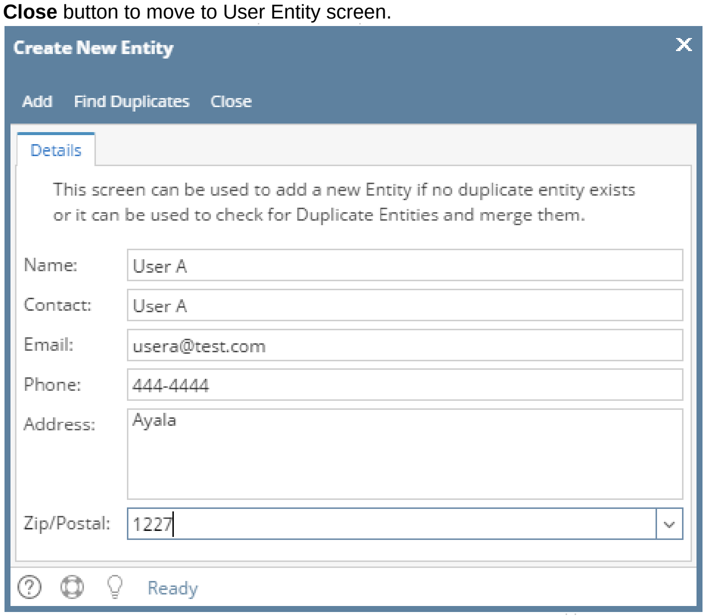
Here are the steps on how to create a new user:

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Users**

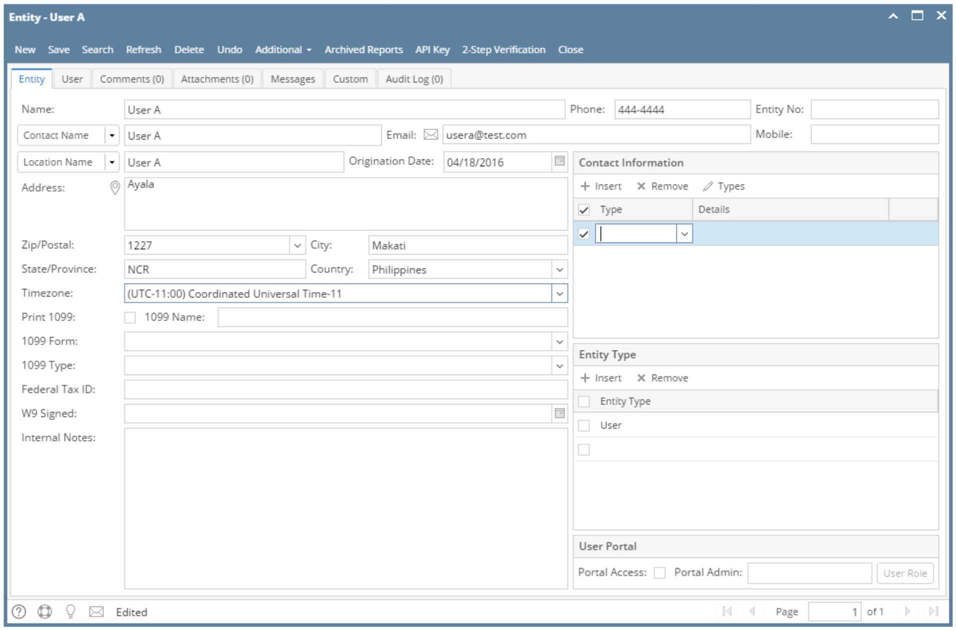
3. On Search **User Entity** screen, click **New** button. **Create New Entity** screen will appear



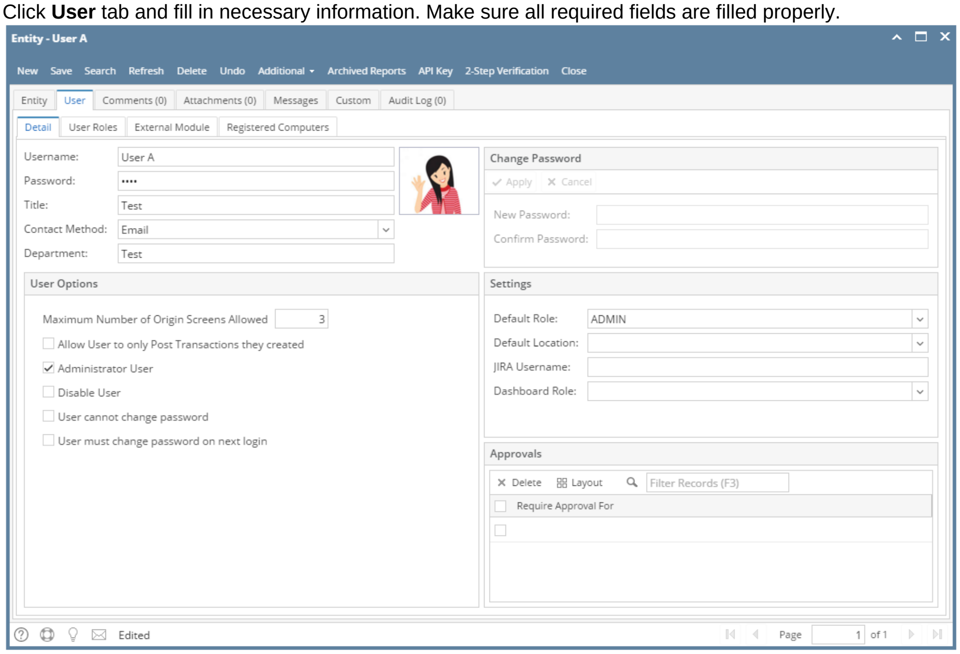
4. Enter user details (**Name, Contact, Email, Phone, Address** and **Zip/Postal).** Then click **Add** button. Optionally, user may skip this part and click **Close** button to move to User Entity screen.



5. All information entered in **Create New Entity** screen will be carried over to **User Entity** screen then fill all other information.



6. Click **User** tab and fill in necessary information. Make sure all required fields are filled properly.



Entity tab:

1. Name

2. Contact Name

3. Location Name

4. Timezone

User tab:

5. Username

6. Password

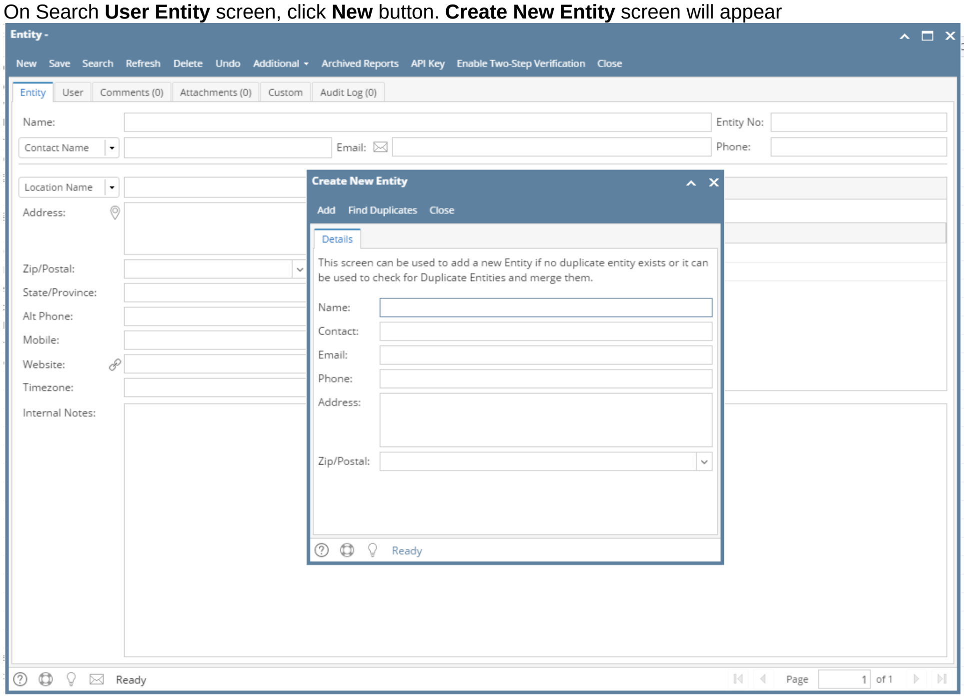
7. Default Role

7. Click **Save** button. New user will be created:

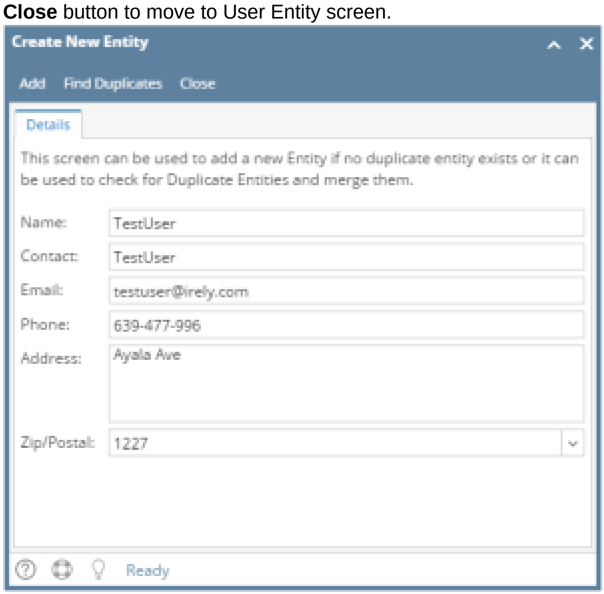
Here are the steps on how to create a new user:

1. Log in as **Admin user**

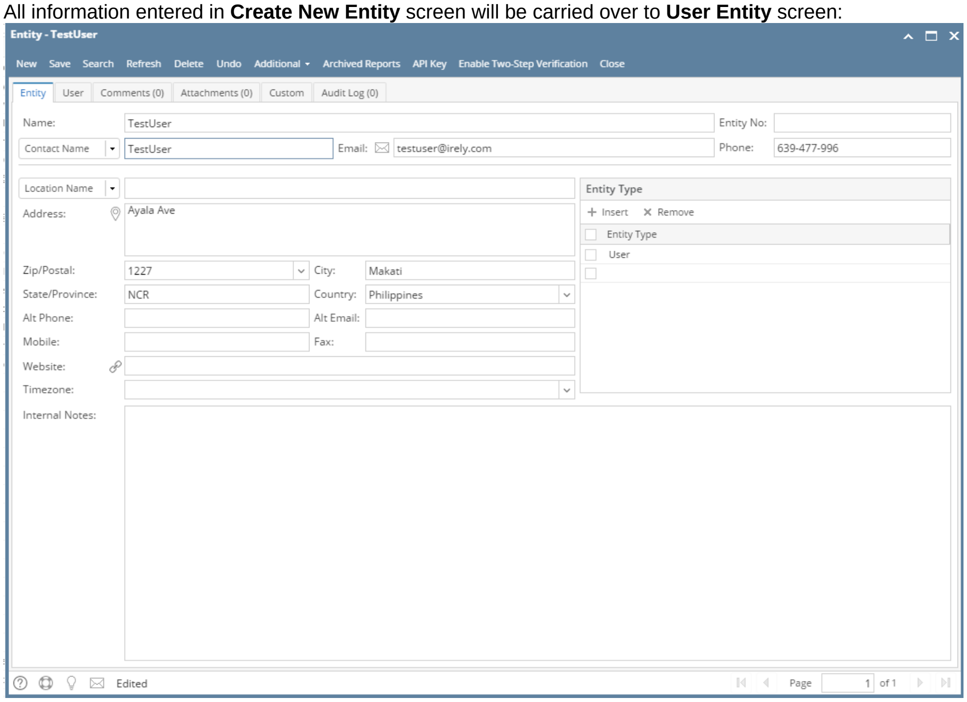
2. On user's menu panel, go to **System Manager** folder then click **Users**
3. On Search **User Entity** screen, click **New** button. **Create New Entity** screen will appear



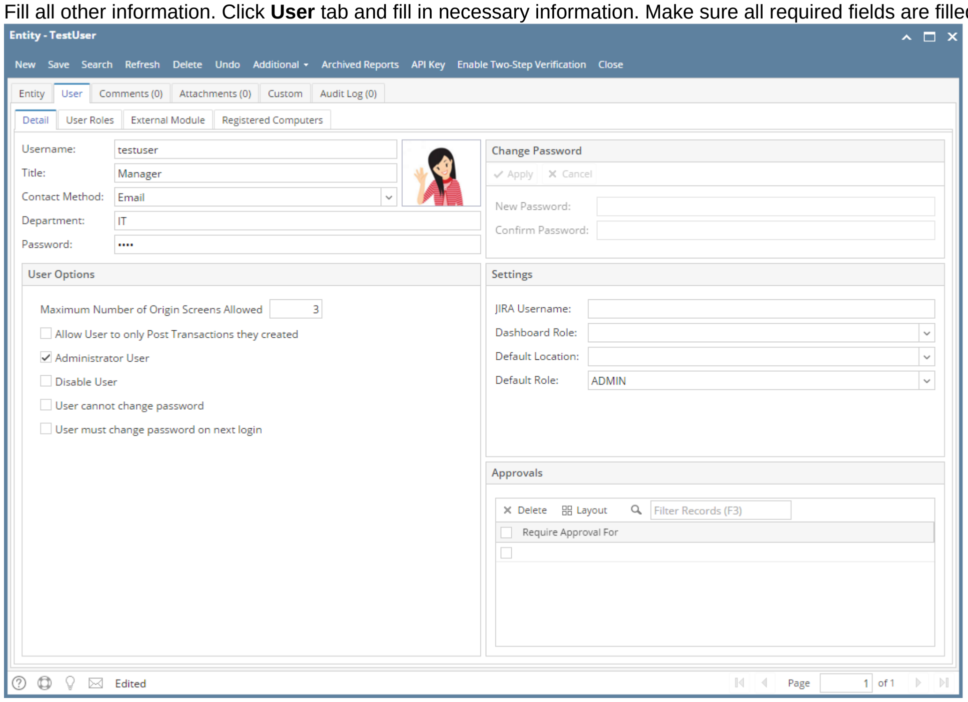
4. Enter user details (**Name, Contact, Email, Phone, Address** and **Zip/Postal).** Then click **Add** button. Optionally, user may skip this part and click **Close** button to move to User Entity screen.



5. All information entered in **Create New Entity** screen will be carried over to **User Entity** screen:



6. Fill all other information. Click **User** tab and fill in necessary information. Make sure all required fields are filled properly.

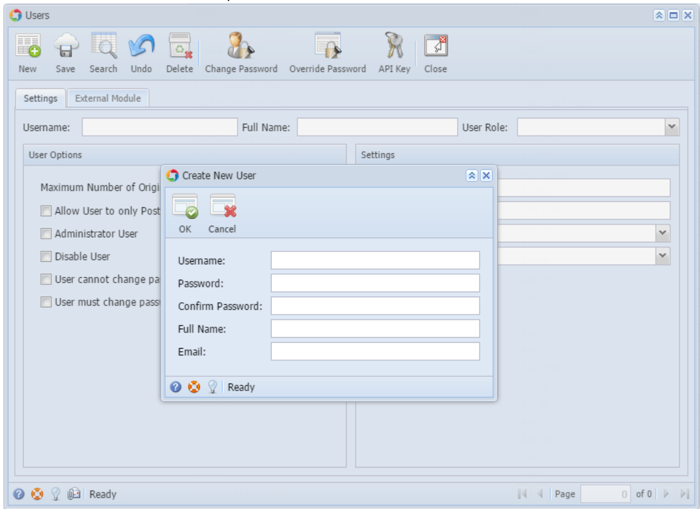


Here are the steps on how to create a new user:

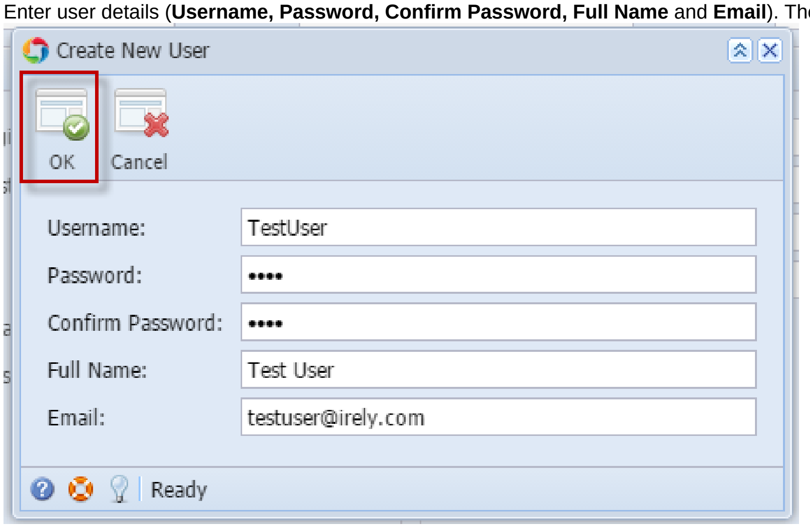
> ⚠ Make sure origin integration is disabled on **Company Preferences**, otherwise, **New** toolbar button will not appear

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Users**

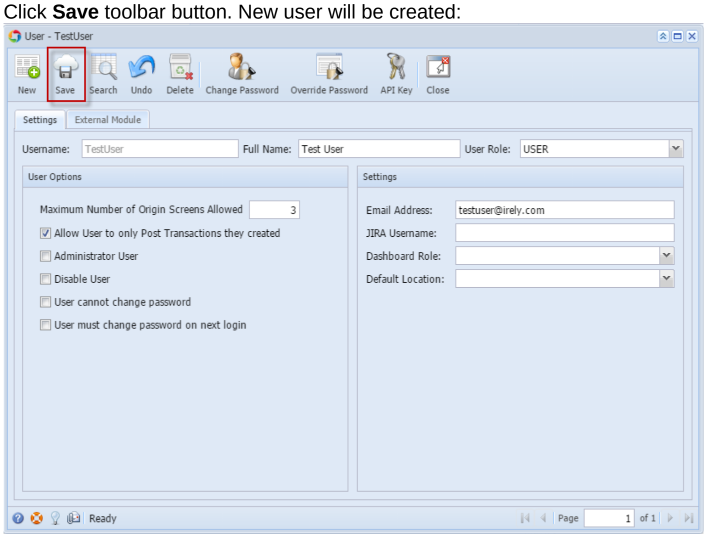
3. On Search **Users** screen, click **New** toolbar button. **Create New User** screen will appear



4. Enter user details (**Username, Password, Confirm Password, Full Name** and **Email**). Then click **OK** toolbar button.



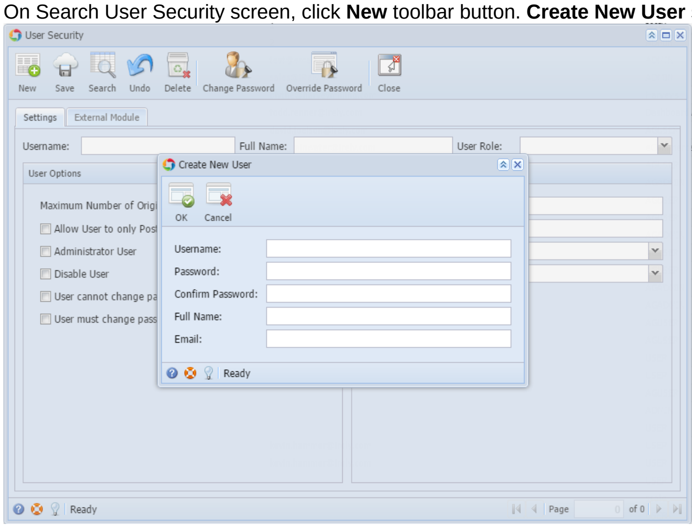
5. Click **Save** toolbar button. New user will be created:



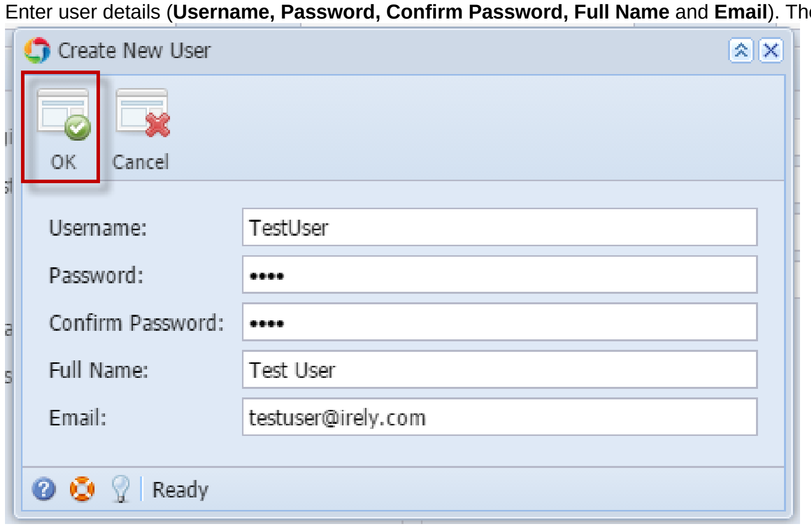
Here are the steps on how to create a new user:

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **User Security**

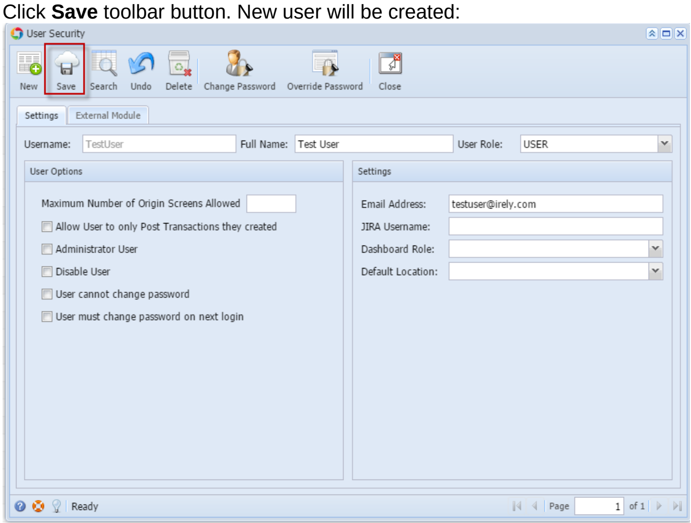
3. On Search User Security screen, click **New** toolbar button. **Create New User** screen will appear



4. Enter user details (**Username, Password, Confirm Password, Full Name** and **Email**). Then click **OK** toolbar button.



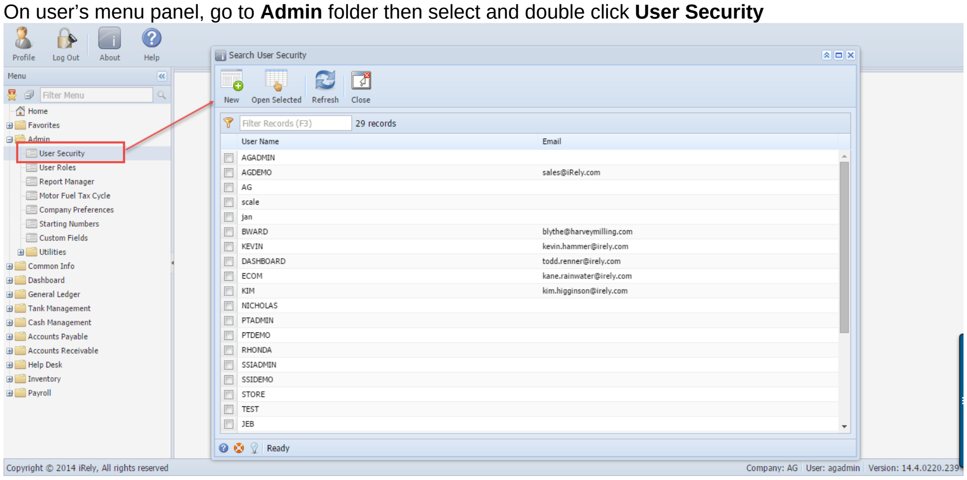
5. Click **Save** toolbar button. New user will be created:



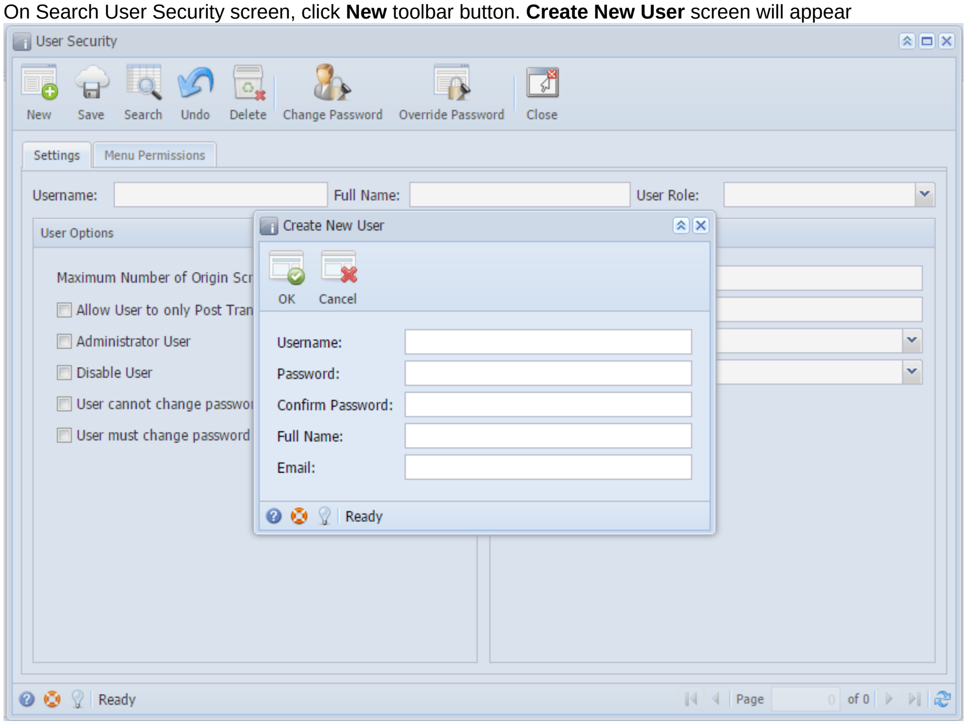
Here are the steps on how to create a new user:

1. Log in as **admin user**

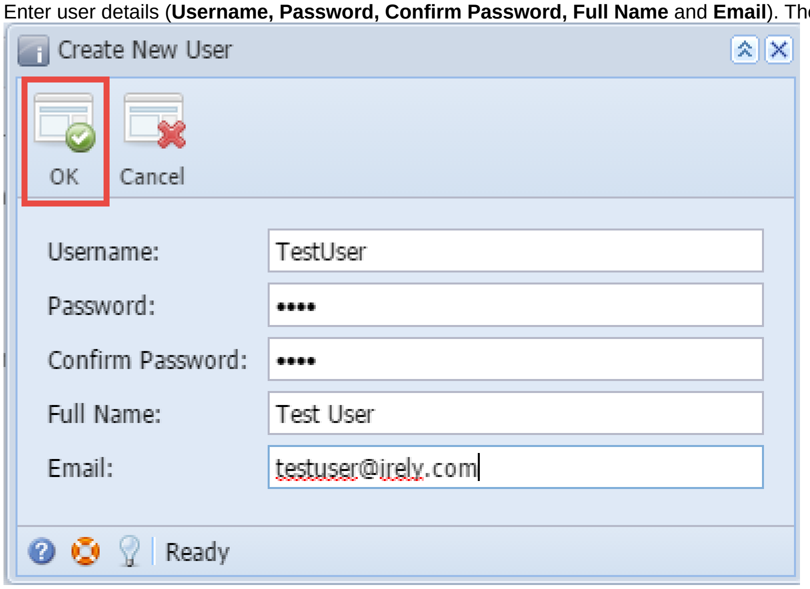
2. On user's menu panel, go to **Admin** folder then select and double click **User Security**



3. On Search User Security screen, click **New** toolbar button. **Create New User** screen will appear



4. Enter user details (**Username, Password, Confirm Password, Full Name** and **Email**). Then click **OK** toolbar button.



5. Click **Save** toolbar button. New user will be created: