

# 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**).

Create New Entity

Find Duplicates

Close

Details

This screen can be used to add a new Entity if no duplicate entity exists or it can be used to check for Duplicate Entities and merge them.

Name

irely-user

Contact

Location

Phone

(236) 326-326

Email

irely-user@test.com

Search Address

Enter address to search...

Address

Fort Washington Avenue

City

New York

State

NY

Zip/Postal

Country

United States

Time Zone

(UTC-04:00) Eastern Daylight Time

Organization

Person

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: <b>City, State, Zip/Postal, Country, Time Zone</b>
Organization	<b>Person</b> - Name will be automatically copied to Contact and Location <b>Company</b> - 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.

The screenshot shows the 'User - irely-user' form with the 'Entity' tab selected. The form contains various fields for user information, including Name, Contact Name, Location Name, Address, City, State, Zip/Postal, Country, Time Zone, Document Delivery, External ERP ID, and Origination Date. The 'Contact Information' section includes a 'Type' dropdown and a 'Details' section. The 'Line of Business' section is also visible. The bottom status bar indicates '1 of 1' and 'Edited'.

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

The screenshot shows the 'User - irely-user' form with the 'User' tab selected. The form contains various fields for user information, including Username, Password, User Role, Security Policy, User Options, Scale Station Selection, Filter Entity Types, VolPstudio Settings, Change Password, Settings, and Approvals. The 'User Options' section includes checkboxes for 'Administrator User', 'Only Allow User to Post Transactions they created', 'Disable User', and 'Store Manager'. The 'Scale Station Selection' section includes fields for Station, Date, and Operator. The 'Filter Entity Types' section includes a 'Filter (F3)' button. The 'VolPstudio Settings' section includes fields for Email, Password, and Phone No. The 'Change Password' section includes fields for New Password and Confirm Password. The 'Settings' section includes fields for Default Location, Contact Method, Dashboard Role, JIRA Username, Date Format, and Number Format. The 'Approvals' section includes a 'Require Approval For' checkbox and an 'Approver List' section. The bottom status bar indicates '1 of 1' and 'Edited'.

**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: <b>City, State, Zip/Postal, Country, Time Zone</b>
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.

Entity - iRely User

New Save Search Refresh Delete Undo Additional ▾ Archived Reports API Key 2-Step Verification Close

Entity User General Messages Activities (0) Attachments (0) Audit Log (0) Origins Custom Crop Insurance

Name \* iRely User Phone 2236652323 Entity No

Contact Name iRely User Suffix Email irelyuser@irely.com Mobile

Entity Type User x Class Contact Information

Location Name iRely User Printed Name iRely User + Insert x Remove Types

Search Address Enter address to search...

Address 452 Massachusetts Avenue

City Arlington State MA

Zip/Postal 02474 Country United States

Time Zone (UTC-04:00) Eastern Daylight Time

Document Delivery

External ERP ID Origination Date 7/3/2017

Line of Business

Line of Business

Internal Notes

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

Entity - iRely User

New Save Search Refresh Delete Undo Additional ▾ Archived Reports API Key 2-Step Verification Close

Entity User General Messages Activities (0) Attachments (0) Audit Log (0) Origins Custom Crop Insurance

Detail User Roles External Module Registered Computers Login History

Username \* iRelyUser Add Photo

Password \*\*\*\*

User Role ADMINISTRATOR

Security Policy \* Default User Policy

User Options

Maximum Origin Screens Allowed 3

☒ Administrator User

☐ Only Allow User to Post Transactions they created

☐ Disable User ☐ Store Manager

Scale Station Selection

Station

Date

Operator

Filter Entity Types

x Delete View Filter (F3)

Entity Type Filter

VolPstudio Settings

Email

Password

Phone No Connect

Change Password

✓ Apply x Cancel

New Password

Confirm Password

Settings

Default Location Title

Contact Method Dept

Dashboard Role

JIRA Username

Date Format Number Format

Approvals

+ Insert x Delete View Filter (F3)

☐ Require Approval For Approver List

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#### Entity tab:

1. Name
2. Contact Name
3. Location Name

#### 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

The screenshot shows the 'Entity' application window. The 'Create New Entity' modal is open, displaying a form with fields for Name, Contact, Email, Zip/Postal, Country, Phone, and Address. The modal also includes a 'Details' tab and a 'Ready' status indicator. The background shows the 'Entity' screen with various tabs and a list of entities.

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

The screenshot shows the 'Create New Entity' modal with the following details entered:

- Name: user001
- Contact: user001
- Email: user001@irely.com
- Zip/Postal: 1227
- Country: Philippines
- Phone: 111-22-22
- Address: Ayala

The modal also includes a 'Details' tab and a 'Ready' status indicator.

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.

The screenshot shows the 'Entity - user001' screen with the 'General' tab selected. The form includes the following fields and sections:

- Name:** user001
- Contact Name:** user001
- Location Name:** (empty)
- Address:** Ayala
- Zip/Postal:** 1227
- State/Province:** NCR
- City:** Makati
- Country:** Philippines
- Timezone:** (empty)
- Document Delivery:** (empty)
- Print 1099:** ☐ 1099 Name: (empty)
- 1099 Form:** (empty)
- 1099 Type:** (empty)
- Federal Tax ID:** (empty)
- W9 Signed:** (empty)
- Internal Notes:** (empty)
- Contact Information:** + Insert, X Remove, Types (empty)
- Entity Type:** + Insert, X Remove, Entity Type (empty), User (empty)

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

The screenshot shows the 'Entity - user001' screen with the 'User' tab selected. The form includes the following fields and sections:

- Username:** user001
- Password:** \*\*\*\*
- User Role:** ADMIN
- Security Policy:** Default User Policy
- User Options:** Maximum Origin Screens Allowed: 3, ☒ Administrator User, ☐ Only Allow User to Post Transactions they created, ☐ Disable User
- Filter Entity Types:** X Delete, Layout, Filter Records (F3), Entity Type (empty), Filter (empty)
- VoIPstudio Settings:** Email: (empty), Password: (empty), Phone No: (empty), Connect
- Change Password:** Apply, Cancel, New Password: (empty), Confirm Password: (empty)
- Settings:** Default Location: (empty), Title: (empty), Contact Method: (empty), Dept: (empty), Dashboard Role: Administrator, JIRA Username: Test User, Date Format: M/d/yyyy, Number Format: 1,234,567.89
- Approvals:** + Insert, X Delete, Layout, Filter Records (F3), Require Approval For (empty), Approver List (empty)

**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

The screenshot shows the 'Entity' screen with a modal titled 'Create New Entity' open. The modal has tabs for 'Add', 'Find Duplicates', and 'Close'. The 'Add' tab is active, showing a 'Details' section with a description: 'This screen can be used to add a new Entity if no duplicate entity exists or it can be used to check for Duplicate Entities and merge them.' Below this are input fields for Name, Contact, Email, Phone, Address, and Zip/Postal. The 'Entity' screen in the background has a menu bar with 'New', 'Save', 'Search', 'Refresh', 'Delete', 'Undo', 'Additional', 'Archived Reports', 'API Key', '2-Step Verification', and 'Close'. It also has a sidebar with 'Entity', 'User', 'Comments (0)', 'Attachments (0)', 'Messages', 'Custom', and 'Audit Log (0)'. The main area contains form fields for Name, Contact Name, Location Name, Address, Zip/Postal, State/Province, Timezone, Print 1099, 1099 Form, 1099 Type, Federal Tax ID, W9 Signed, and Internal Notes. There is also a 'User Portal' section with 'Portal Access', 'Portal Admin', and 'User Role' fields.

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.

The screenshot shows the 'Create New Entity' modal with the 'Add' tab selected. The 'Details' section contains the following user details: Name: User A, Contact: User A, Email: usera@test.com, Phone: 444-4444, Address: Ayala, and Zip/Postal: 1227. The modal has a 'Ready' status at the bottom.

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

The screenshot shows the 'Entity - User A' form. The 'Entity' tab is selected. The form contains various fields for user information, including Name, Contact Name, Location Name, Address, Zip/Postal, City, State/Province, Country, Timezone, Print 1099, 1099 Form, 1099 Type, Federal Tax ID, W9 Signed, and Internal Notes. On the right side, there are sections for 'Contact Information', 'Entity Type', and 'User Portal'.

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

The screenshot shows the 'Entity - User A' form with the 'User' tab selected. The form contains various fields for user information, including Username, Password, Title, Contact Method, Department, User Options, Change Password, Settings, and Approvals.

#### 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

The screenshot shows the 'Entity -' application window. The main window has a menu bar with 'New', 'Save', 'Search', 'Refresh', 'Delete', 'Undo', 'Additional', 'Archived Reports', 'API Key', 'Enable Two-Step Verification', and 'Close'. Below the menu bar is a tabbed interface with 'Entity', 'User', 'Comments (0)', 'Attachments (0)', 'Custom', and 'Audit Log (0)'. The 'Entity' tab is active, showing a form with fields for 'Name', 'Entity No.', 'Contact Name', 'Email', 'Phone', 'Location Name', 'Address', 'Zip/Postal', 'State/Province', 'Alt Phone', 'Mobile', 'Website', 'Timezone', and 'Internal Notes'. A 'Create New Entity' dialog box is open in the foreground, showing the same form fields. The dialog box has a title bar with 'Create New Entity' and buttons for 'Add', 'Find Duplicates', and 'Close'. The 'Details' tab is selected, showing a description: 'This screen can be used to add a new Entity if no duplicate entity exists or it can be used to check for Duplicate Entities and merge them.' The status bar at the bottom of the dialog box shows 'Ready'.

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.

The screenshot shows the 'Create New Entity' dialog box with the following details entered:

- Name: TestUser
- Contact: TestUser
- Email: testuser@irely.com
- Phone: 639-477-996
- Address: Ayala Ave
- Zip/Postal: 1227

The status bar at the bottom of the dialog box shows 'Ready'.

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

Entity - TestUser

New Save Search Refresh Delete Undo Additional Archived Reports API Key Enable Two-Step Verification Close

Entity User Comments (0) Attachments (0) Custom Audit Log (0)

Name: TestUser Entity No:

Contact Name: TestUser Email: testuser@irely.com Phone: 639-477-996

Location Name: Address: Ayala Ave

Zip/Postal: 1227 City: Makati

State/Province: NCR Country: Philippines

Alt Phone: Mobile: Website: Timezone:

Internal Notes:

Entity Type

+ Insert X Remove

☐ Entity Type

☐ User

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

Entity - TestUser

New Save Search Refresh Delete Undo Additional Archived Reports API Key Enable Two-Step Verification Close

Entity User Comments (0) Attachments (0) Custom Audit Log (0)

Detail User Roles External Module Registered Computers

Username: testuser Title: Manager

Contact Method: Email Department: IT Password: \*\*\*\*

Change Password

✓ Apply X Cancel

New Password: Confirm Password:

User Options

Maximum Number of Origin Screens Allowed: 3

☐ Allow User to only Post Transactions they created

☒ Administrator User

☐ Disable User

☐ User cannot change password

☐ User must change password on next login

Settings

JIRA Username: Dashboard Role: Default Location: Default Role: ADMIN

Approvals

X Delete Layout Filter Records (F3)

☐ Require Approval For

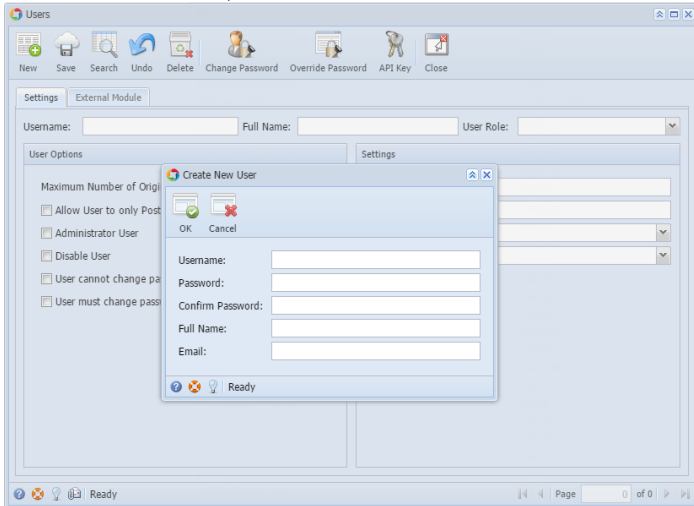
Here are the steps on how to create a new user:



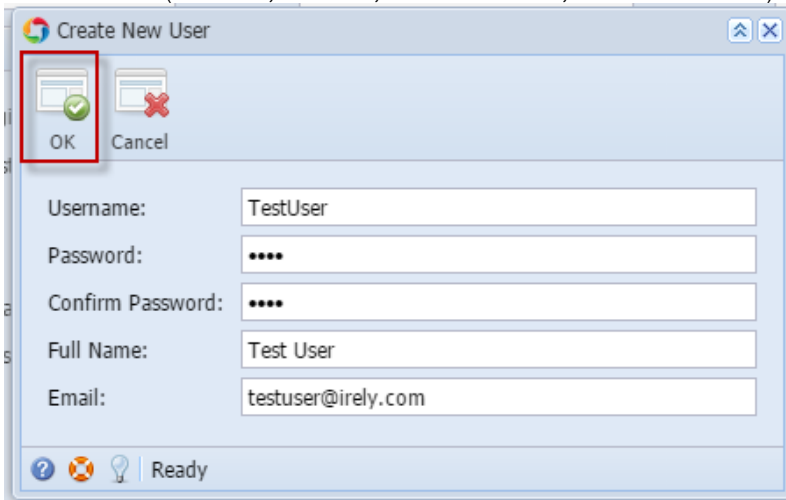
Make sure origin integration is disabled on **Company Preferences**, otherwise, **New** toolbar button will not appear

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

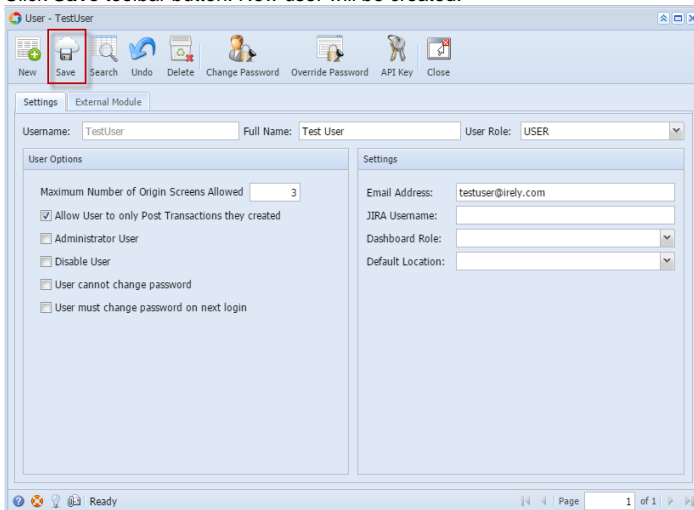
3. On Search **Users** screen, click **New** toolbar button. **Create New User** screen will appear



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



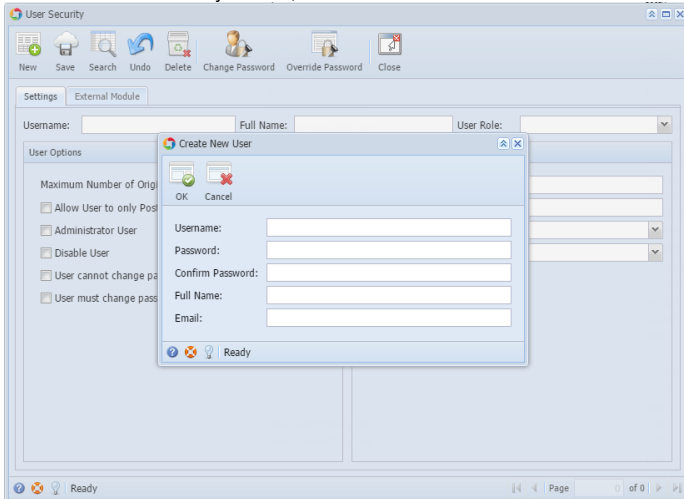
5. Click **Save** toolbar button. New user will be created:



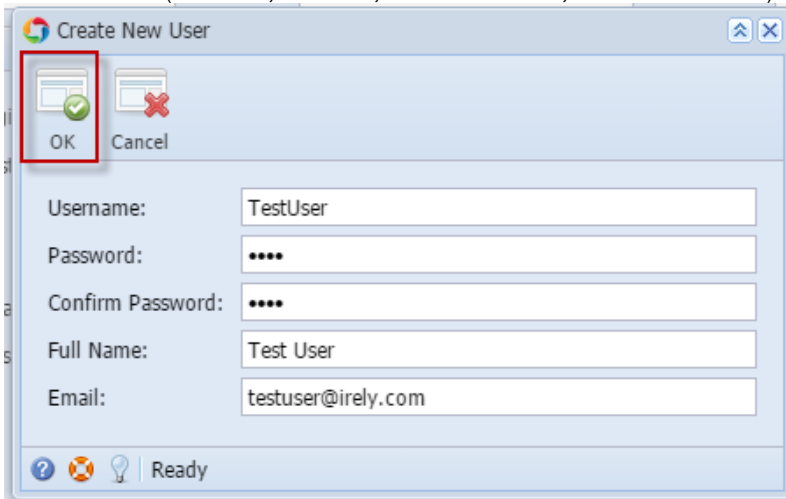
Here are the steps on how to create a new user:

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

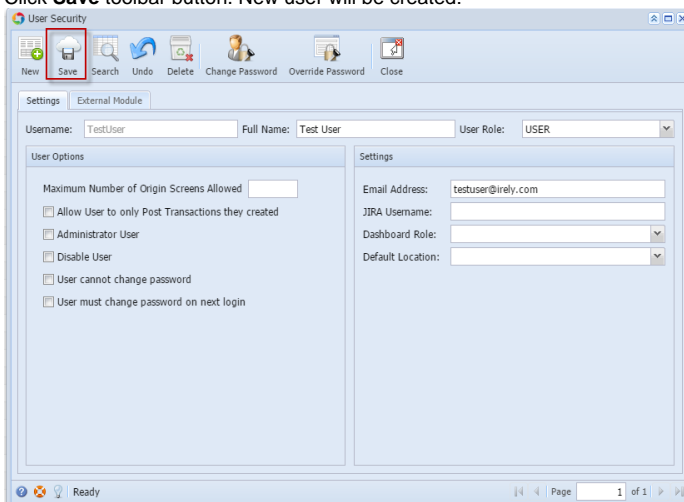
3. On Search User Security screen, click **New** toolbar button. **Create New User** screen will appear



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



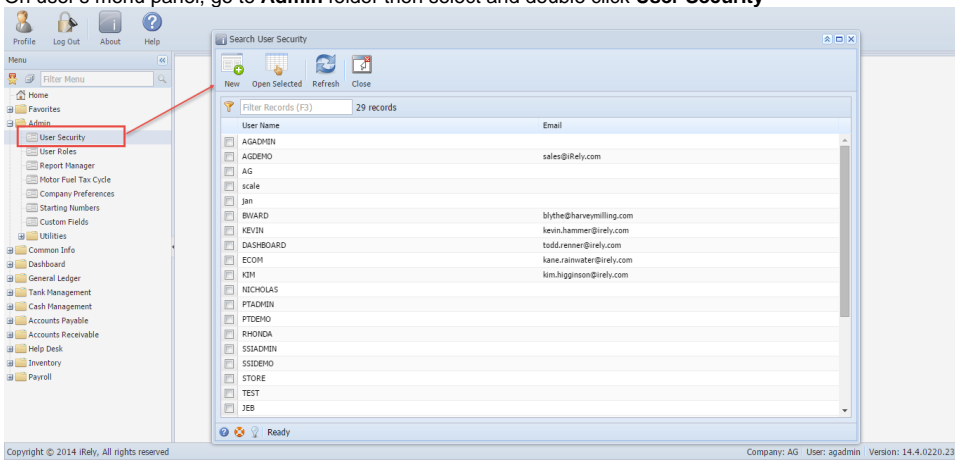
5. Click **Save** toolbar button. New user will be created:



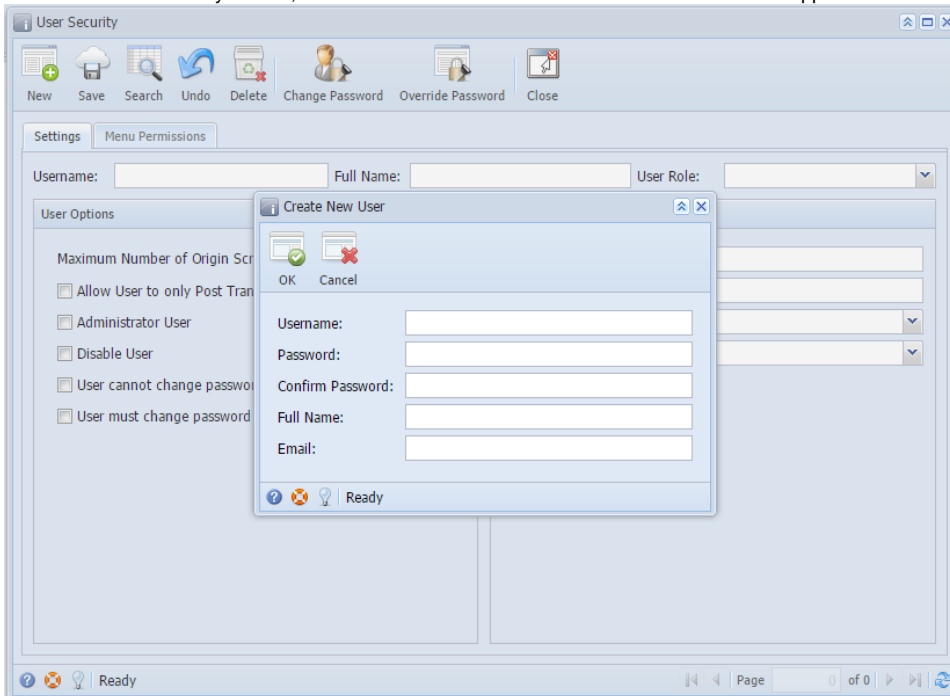
Here are the steps on how to create a new user:

1. Log in as **admin user**

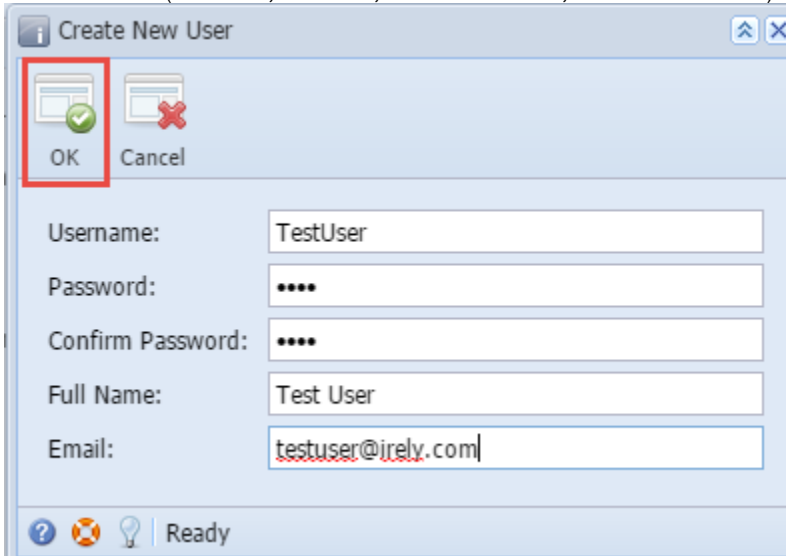
2. On user's menu panel, go to **Admin** folder then select and double click **User Security**



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:

The screenshot shows a 'User Security' dialog box with a toolbar at the top. The 'Save' button, represented by a floppy disk icon, is highlighted with a red rectangle. Other toolbar buttons include 'New' (plus icon), 'Search' (magnifying glass), 'Undo' (curved arrow), 'Delete' (trash can), 'Change Password' (person with key), 'Override Password' (document with key), and 'Close' (X icon). Below the toolbar are two tabs: 'Settings' (selected) and 'Menu Permissions'. The 'Settings' tab contains two main sections: 'User Options' on the left and 'Settings' on the right. The 'User Options' section includes a text field for 'Maximum Number of Origin Screens Allowed' and five checkboxes: 'Allow User to only Post Transactions they created', 'Administrator User', 'Disable User', 'User cannot change password', and 'User must change password on next login'. The 'Settings' section includes text fields for 'Email Address' (containing 'testuser@irely.com'), 'JIRA Username', and dropdown menus for 'Dashboard Role' and 'Default Location'. At the bottom of the dialog, there is a status bar with a question mark icon, a lightbulb icon, the word 'Edited', and a page indicator showing 'Page 1 of 1'.

User Security

New Save Search Undo Delete Change Password Override Password Close

Settings Menu Permissions

Username: TestUser Full Name: Test User User Role: USER

User Options

Maximum Number of Origin Screens Allowed

☐ Allow User to only Post Transactions they created

☐ Administrator User

☐ Disable User

☐ User cannot change password

☐ User must change password on next login

Settings

Email Address: testuser@irely.com

JIRA Username:

Dashboard Role:

Default Location:

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