How to Import Origin Roles into i21

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• Only Admin user can import origin user roles to i21 company.

- Make sure Origin Integration is enabled on Company Configuration.
- 1. Log in as Admin user
- On user's menu panel, go to System Manager menu
 Open Imports and Conversions menu under Utilities group
- 4. On Imports and Conversions screen, click Import Origin User Roles button to open Import User Roles screen

Details			
System Manager	Download CSV Template +		
General Ledger	Migrations		
Financial Report Designer	Minute United	Greater entity entry for uners created on Version 14.2 or lower	
Cash Management	Migrate Osers	creates entity entry for users created on version 14.2 of lower.	
Inventory	Import Origin Menus	Import Origin Menus	
Purchasing			
Sales	Import Origin User Roles	Import Origin User Roles	
Payroll			
Ticket Management	Import Origin Users	Import origin users	
Contract Management	Import Company Locations	Import Company Locations	
Manufacturing			
Tank Management	Import Taxes	Import Taxes	
Card Fueling			
Transports	Import Tax Rates	Import Lax Kates	
Patronage			

import oser koles	^	
Import Close		
Details		
Role Name	Description	
✓ demo	Demo Group	
🗸 mark	Mark's Group	
printer	printer.adm	
st	Store Utilities	
sue	Sue's menus	

6.	Click	Yes	button	on	confirmation	message
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	Import User Roles		
	Import Close		
	iRely i21		
	Are you sure you want to import the selected roles?		
	Yes No		
l	This message will show when importing is successful		
	i		
	iRely i21		
	Roles imported successfully!		
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7. To confirm role has been imported, go to System Manager > User Roles. Imported Origin user role record should be in the list.

f Origin Integration is disabled on Company Configuration, this message will appear:

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iRely i21
Unable to import Origin Roles because the Origin Integration is disabled on Company Configuration.
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- Log in as Admin user
 On user's menu panel, go to System Manager folder then click Utilities folder
 Click Origin Conversions menu to open

4. On Origin Conversions screen, click Import Origin User Roles button to open Import User Roles screen

Origin Conversions		~ X
Close		
Details		
System Manager	Migrations	
General Ledger Financial Report Designer	Migrate Users Creates entity entry for users created on Version 14.2 or lower.	
Cash Management	Import Origin Menus	
Purchasing	Import Origin User Roles	
Tank Management	Import Origin Users Import Origin Users	
Card Fueling	Import Company Locations Import Company Locations	
	Common Info Migrations	
	Currency Migrates all Origin Currencies into i21 Currencies	
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Import User Roles	^	×
Import Close		
Details		
Role Name	Description	
✓ demo	Demo Group	
✓ mark	Mark's Group	
printer	printer.adm	
st	Store Utilities	
sue	Sue's menus	
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6. Click Yes button on confirmation message

	Import User Roles	^ □ >
	Import Close	
	iRely i21	
	Are you sure you want to import the selected roles?	
	Yes No	
	This message will show when importing is successful	
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	This message will show when importing is successful iRely i21	
	This message will show when importing is successful iiRely i21 Roles imported successfully!	

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 Click Origin Conversions menu to open

4. On Origin Conversions screen, click Import Origin User Roles button to open Import User Roles screen

Origin Conversions			~ X
Close			
Details			
System Manager	Migrations		
General Ledger			
Tank Management	Migrate Users	Creates entity entry for users created on Version 14.2 or lower.	
Sales			
Purchasing			
Cash Management	Import Origin Menus	Import Origin Menus	
Financial Report Designer			
Card Fueling	Import Origin User Roles	Import Origin User Roles	
	Import Origin Users	Import Origin Users	
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	Common Info Migrations		
	Currency	Migrates all Origin Currencies into i21 Currencies	
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Import User Roles	∧ □ >
Import Close	
Details	
Role Name	Description
✓ demo	Demo Group
✓ mark	Mark's Group
printer	printer.adm
st	Store Utilities
sue	Sue's menus

6.	Click	Yes	button	on	confirmation	message
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Import User Roles	~ 🗆 >
Import Close	
iRely i21	
Are you sure you want to import the selected roles?	
Yes No	
This message will show when importing is successful	
iRely i21	
Roles imported successfully!	
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iRely i21
Unable to import Origin Roles because the Origin Integration is disabled on Company Configuration.
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- Log in as Admin user
 On user's menu panel, go to System Manager folder then click Utilities folder

3. Select and open Origin Conversions menu

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Close				
System Manager	Migrations	Migrations		
General Ledger				
Tank Management	Migrate Users	Creates entity entry for users created on Version 14.2 or lower.		
Sales				
Purchasing		l		
Cash Management	Import Origin Menus	Import Origin Menus		
Financial Report Designer				
	Import Origin User Roles	Import Origin User Roles		
	Impact Origin Users	Tennert Origin Liners		
	Import Origin Osers	Import origin osers		
Common Info Migrations				
	Currency	Migrates all Origin Currencies into i21 Currencies		
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4. Click Import Origin User Roles button. Import User Roles screen will appear.

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Import Close			
Role Name	Description		
printer	printer.adm		
🔲 st	Store Utilities		
sue sue	Sue's menus		
	5de 5 menus		

🌍 Import User Roles	
Import Close	
Role Name	Description
printer	printer.adm
st st	Store Utilities
✓ sue	Sue's menus

6. Click Yes button on confirmation message



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