

How to Setup User Role based on Company Locations

Each user can have access to multiple company locations and may not have the same level of authentication in all company locations. This can be done by setting up the Company Locations and User Role of the user.

Here are the steps on how to set up the User Role of the User:

1. Company Locations must be set up properly. See [How To Add Company Locations](#) for the guide.
2. User Roles must be set up properly. See [How to Add User Role Type](#) for the guide.
3. On user's menu panel, go to **System Manager** folder then click **Users**
4. You may create a new user or edit an existing user record.
5. Click the **Users** tab on the Entity screen
6. Click the **User Roles** tab.

The screenshot shows the 'Entity - user01' form with the 'User Roles' tab selected. The 'Location Name' dropdown is empty, and the 'User Role' dropdown is also empty.

7. Click the **Add** button then select a location from the Location Name drop down:

The screenshot shows the 'Entity - user01' form with the 'User Roles' tab selected. The 'Location Name' dropdown is open, displaying a list of locations:

Location Name	Address	Type
0000 - Home Office	344 New Albany R	Office
0001 - Fort Wayne	4242 Flagstaff Cove	Warehouse
0002 - Indianapolis	Parkway street	Warehouse
0003 - Richmond		Plant
0004 - South Bend		Farm
0005 - Chatham		Warehouse

8. Select a **User Role** for the location:

The screenshot shows the 'Entity - user01' form with the 'User Roles' tab selected. The 'Location Name' dropdown is open, and the 'User Role' dropdown is also open, displaying a list of user roles:

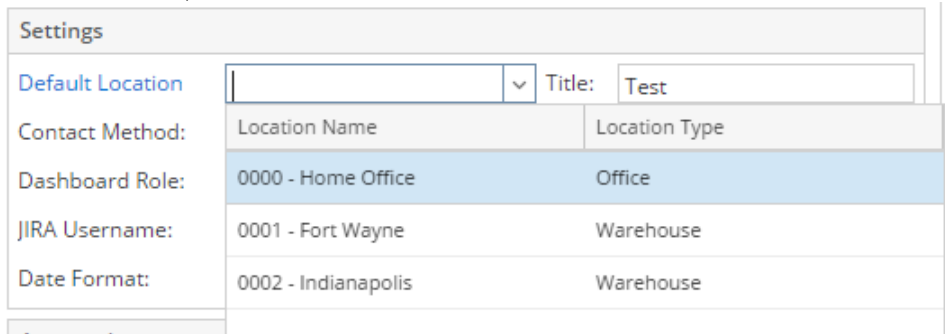
User Role	Admin Rights
ADMIN	true
USER	false
ADMINISTRATOR	true
PETRO ADMIN	true
AP CLERK	false
CUSTOMER SERVICE REP	false

9. User can have multiple locations with different roles:

The screenshot shows the 'Entity - user01' form with the 'User Roles' tab selected. The 'Location Name' dropdown is open, and the 'User Role' dropdown is also open, displaying a list of user roles:

Location Name	User Role
0000 - Home Office	ADMIN
0001 - Fort Wayne	USER
0002 - Indianapolis	ADMINISTRATOR

10. Go back to Detail tab, add a **Default Location** to the user

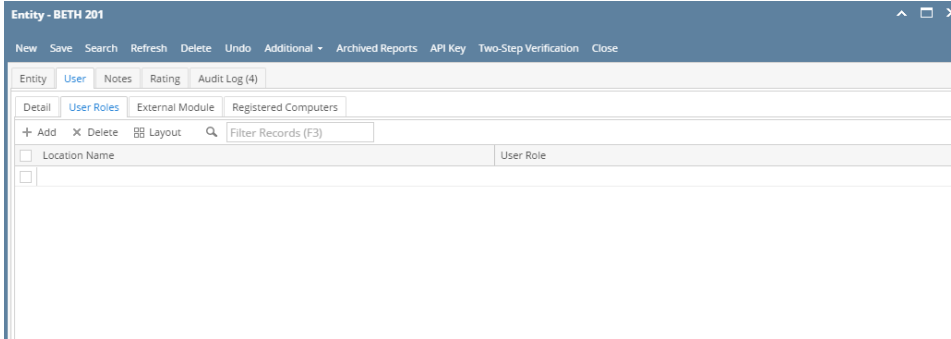


Location Name	Location Type
0000 - Home Office	Office
0001 - Fort Wayne	Warehouse
0002 - Indianapolis	Warehouse

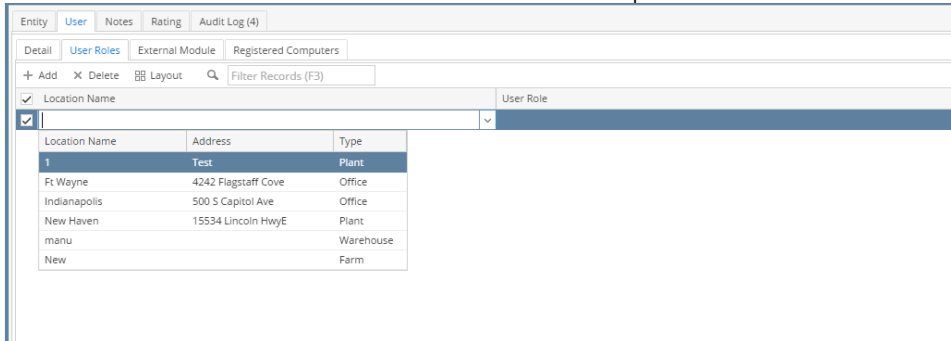
11. Click the **Save** button.

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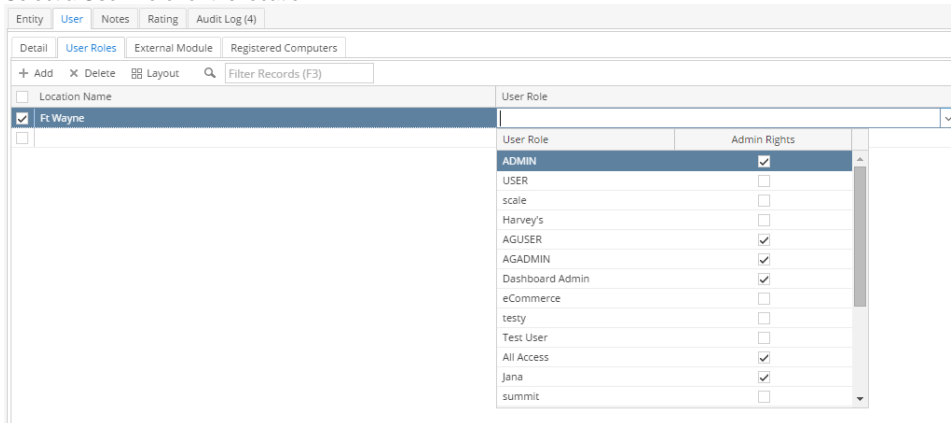


7. Click the **Add** button then select a location from the Location Name drop down:



Location Name	Address	Type
1	Test	Plant
Ft Wayne	4242 Flagstaff Cove	Office
Indianapolis	500 S Capitol Ave	Office
New Haven	15534 Lincoln HwyE	Plant
manu		Warehouse
New		Farm

8. Select a **User Role** for the location:



User Role	Admin Rights
ADMIN	<input checked="" type="checkbox"/>
USER	<input type="checkbox"/>
scale	<input type="checkbox"/>
Harvey's	<input type="checkbox"/>
AGUSER	<input checked="" type="checkbox"/>
AGADMIN	<input checked="" type="checkbox"/>
Dashboard Admin	<input checked="" type="checkbox"/>
eCommerce	<input type="checkbox"/>
testy	<input type="checkbox"/>
Test User	<input type="checkbox"/>
All Access	<input checked="" type="checkbox"/>
Jana	<input checked="" type="checkbox"/>
summit	<input type="checkbox"/>

9. User can have multiple locations with different roles:

Entity		User	Notes	Rating	Audit Log (5)
Detail		User Roles	External Module	Registered Computers	
+ Add		X Delete	Layout	Filter Records (F3)	
<input type="checkbox"/>	Location Name			User Role	
<input type="checkbox"/>	Ft Wayne			ADMIN	
<input type="checkbox"/>	Indianapolis			USER	
<input type="checkbox"/>	New Haven			USER	
<input type="checkbox"/>					

10. Add a **Default Location** to the user

Entity		User	Notes	Rating	Audit Log (5)								
Detail		User Roles	External Module	Registered Computers									
Username: BETH		<div>Add Photo</div>											
Title:													
Contact Method:													
Department:													
User Options		Change Password											
Maximum Number of Origin Screens Allowed 3		✓ Apply X Cancel											
<input checked="" type="checkbox"/> Allow User to only Post Transactions they created		New Password:											
<input checked="" type="checkbox"/> Administrator User		Confirm Password:											
<input type="checkbox"/> Disable User		Settings											
<input type="checkbox"/> User cannot change password		JIRA Username:											
<input type="checkbox"/> User must change password on next login		Dashboard Role: User											
		Default Location:											
		<table><tr><th>Location Name</th><th>Location Type</th></tr><tr><td>Ft Wayne</td><td>Office</td></tr><tr><td>Indianapolis</td><td>Office</td></tr><tr><td>New Haven</td><td>Plant</td></tr></table>				Location Name	Location Type	Ft Wayne	Office	Indianapolis	Office	New Haven	Plant
Location Name	Location Type												
Ft Wayne	Office												
Indianapolis	Office												
New Haven	Plant												
		<input type="checkbox"/> Require purchase											

11. Click the **Save** button.