

Set up a new User

Steps to set up a new User

1. Home > System Manager > User - Can also click on New User (Create)
2. Click New, enter details on Create New Entity screen - If a user name already exists in the system, it will find the duplicate and prompt to merge or create a new one
3. Duplicate Entities found: Add or Merge - Select the entity to merge or click add to enter
4. Add > Entity > User - In User tab, add the username and password, and give Menu permission, Screen permission, Control permission, Sub roles

The screenshot displays the iRelay LLC system interface. On the left is a dark sidebar with a list of modules: Home, Dashboard, System Manager, Common Info, General Ledger, Financial Reports, Cash Management, Credit Card Recon, Inventory, Purchasing (A/P), Sales (A/R), Payroll, Contract Management, Risk Management, Ticket Management, Logistics, Manufacturing, Tank Management, Card Fueling, Store, CRM, Transports, and Meter Billing. The 'System Manager' module is selected, and the 'Users' sub-module is active. The main content area shows a 'Create New Entity' form. At the top of this form is a 'Find Duplicates' checkbox, which is checked. Below this is a 'Details' tab. The form contains several input fields: Name (highlighted in yellow), Contact, Location, Phone, Email, Search Address (with a placeholder 'Enter address to search...'), Address (with a location pin icon), City, State, Zip/Postal, Country (set to 'United States'), Time Zone, Organization (set to 'Company'), and Line of Business. A toolbar at the top of the form includes buttons for 'Open Selected', 'New' (highlighted in yellow), and 'Export'. A 'User -' dropdown menu is also visible. The bottom of the screen shows a mobile status bar with the time 5:27.

Create New Entity

Find DuplicatesClose

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.

NameDavid

Duplicate Entities

AddMergeClose

Details

RemoveOpenExportViewFilter (F3)

Entity No.	Name	Contact	Location	Email	Phone	Add
<input type="checkbox"/>	David R...	David Reisch	David Reisch	dreisch...		
<input type="checkbox"/>	David F...	David Fulkner	David Fulkner			
<input type="checkbox"/>	David C...	David Cline	David Cline			
<input type="checkbox"/>	David L...	David Lanter	David Lanter			
<input type="checkbox"/>	0001005099David ...	David Martinez	David Martinez	dmartin...		
<input type="checkbox"/>	0001005109David S...	David Stechsch...	David Stechsch...	stechgo...		

User - David

*Note: clicked Add not Merge

NewSaveSearchDeleteUndoAdditionalAPI Key2-Step VerificationClose

EntityUserGeneralMessagesActivitiesAttachmentsAudit LogOriginsEntity TypeCustomCrop Insurance

DetailUser RolesExternal ModuleRegistered ComputersLogin History

Username*

Password*

User Role*

Security Policy*Default User Policy

Add Photo

VolPstudio Settings

Email

Password

Phone No

Connect

Change Password

Apply

New Password

Confirm Password

User Options

Maximum Origin Screens Allowed3

☐ Administrator User

☐ Only Allow User to Post Transactions they created

☐ Disable User

☐ Store Manager

Settings

Default Location

Title

Contact Method

Dept

Dashboard Role

JIRA Username