User Maintenance

What's in this page

Step-by-step guides

To Create a Basic User:

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> '**Account Selection**' (**zAccounts.aspx**).
3. Select an account for the user from the grid.
4. Click on **'Users'** which is located below the grid containing the accounts.
5. Click on **'New'** which is located below the grid containing the users.
6. Insert the relevant details as specified below.
7. Click **'OK'** to create the user or **'Cancel'** to not insert the user.

To Access User Maintenance:

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> **'User Maintenance'** (**zUsers.aspx**).

To Edit a User:

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> **'User Maintenance'** (**zUsers.aspx**).
3. Use the search bar above the grid to find the required user.
4. Select the user's record via radio button.
5. Click **'Modify'**, located below the user grid.
6. Update the relevant details as specified below.
7. Click **'OK'** to save changes or **'Cancel'** to leave the user's details as is.

To Delete a User:

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> **'User Maintenance'** (**zUsers.aspx**).
3. Use the search bar above the grid to find the required user.
4. Select the user's record via radio button.
5. Click **'Delete'**, located below the user grid.
6. When asked to confirm deletion, click **'Yes'** to delete the user or **'No'** to leave the user as is.

ⓘ

ⓘ There is a system setting to determine whether a confirmation request is displayed when deleting a user. The setting is called '**Show Confirm On Grid Delete/Remove**' and is found under the '**General'** Tab in **'Settings'**.

To Change a User's Password:

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> **'User Maintenance'** (**zUsers.aspx**).
3. Use the search bar above the grid to find the required user.
4. Select the user's record via radio button.
5. Click **'Modify'**, located below the user grid.
6. In the **'Password'** field, enter the new password.
7. In the **'Confirm Password'** field, enter the new password again.
8. Click **'OK'** to save the changes or **'Cancel'** to leave the user's details as is.

To Change a User's Email Address/Login ID:

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> **'User Maintenance'** (**zUsers.aspx**).
3. Use the search bar above the grid to find the required user.
4. Select the user's record via radio button.
5. Click **'ChangeEmailAddress'**, located below the user grid.
6. In the **'New Email Address'** field, enter the email address.
7. If the user has a **'Notification Email address'** defined, tick the box labelled '**Update Notify Email Address**' to update the user's notification email address as well.
8. Click **'Change'** to save the changes.

User Details

Setting	Description
User Email Address	This is the user's login ID. It is also used as the email address to which any system-generated emails are sent. If this is not a valid email address, the '**Notifcation Email Address**' is used.
First Name	The user's first name. This data may be used to personalise certain screens and emails within the system.
Surname	The user's surname. This data may be used to personalise certain screens and emails within the system.
Deactivate User Account	When ticked, deactivates the user's account. A deactivated user cannot log in.
Contact Phone Number	The user's work, home, or mobile phone number.
Password	The user's password (not displayed due to security reasons).
Confirm Password	The user's password repeated. Used when updating passwords to confirm the password has been typed correctly.
Order Limit	The maximum dollar amount allowable for the user's orders before approval is required.
Initial Role After Login	The role the user will operate on once they have successfully logged in.
Rep Code	The user's Rep Code, enabling access to order tracking, user favourites for users linked to that code. Mainly for use in Commerce Vision's Mobile Application Framework.
Additional Rep Codes	Additional Rep Codes to which the user should have access (codes separated by semicolon).
Customer Code	The customer code to which the user is attached.
Notification Email Address	The email address to which any system-generated emails are sent (if the user's login ID is not a valid email address or the user prefers a different address be used.)

Account Administrator	When ticked, allows the user access to administer other users attached to the same account. This is used when there are many users on each account and a specific Administrator has been assigned to look after those users.
Display Availability in Order Entry Screen	Overrides system and role settings for displaying product availability.
Orders Approved By	The email address of the user who approves this user's (Over Limit) orders.
User Organisation Name	Use this field to override the company name displayed at the top of the Printer Friendly statement view.
Default Home Page	This is used to define a custom page for use as the landing page when the user logs in.
Bypass Customer Budget	This will bypass the customer's budget if the customer budget function is active.
Can Assign All Roles	This is used to let 'Account Administrator' users assign any role to their account's users.
Global Catalogue Access	Full - The user will have full access to browse and order from the Global Catalogue. ViewOnly - The user will have full access to browse the Global Catalogue, but will be unable to Add to Cart, or submit orders. Denied - The user will have no access to the Global Catalogue.
Hide Alternative Roles	When ticked, hides the list of roles the user has access to (if more than one).
Allow Modify Company Templates	When ticked, allows the user to modify any Company order templates that have been created by other users on the same account.
Allow User IP Restriction	Allows a user to first log in from a non-specified IP address if the user is restricted but not specified.
Restricted IP Address	Set the allowed IP address from which this user can log in.
Show All Orders On All Accounts Requiring Approval	When viewing orders to be approved, all orders from all accounts the user can approve will be displayed.
Allow Price Override?	Whether the user is allowed to override the price of a product (Rep use only).
Enable Email Approval	When ticked, enables links within approval emails, allowing for one-click order approval or rejection.
Allow Password Reset	When ticked, allows user to change passwords in the 'My Account' screen.

Activating/Deactivating Users

User logins can be deactivated by Administrators, which prevents the user from logging into the website. Conversely, deactivated users can be activated when access is required.

To Activate a User:

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> **'User Maintenance'** (**zUsers.aspx**).
3. Use the search bar above the grid to find the required user.
4. Select the user's record via radio button.
5. Click **'Modify'**, located below the user grid.
6. Untick the box labelled **'Deactivate User Account'**.
7. Click **'OK'** to save changes or **'Cancel'** to leave the user's status as is.

To Deactivate a User:

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> **'User Maintenance'** (**zUsers.aspx**).
3. Use the search bar above the grid to find the required user.
4. Select the user's record via radio button.
5. Click **'Modify'**, located below the user grid.
6. Tick the box labelled **'Deactivate User Account'**.
7. Click **'OK'** to save changes or **'Cancel'** to leave the user's status as is.

Multiple Account Access

A User many need to have access to several accounts due to business requirements. When a single user is set up to access multiple accounts, they will be able to switch between accounts while logged in.

To Add an Account to a User:

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> **'User Maintenance'** (**zUsers.aspx**).
3. Use the search bar above the grid to find the required user.
4. Select the user's record via radio button.
5. Click **'Multiple Accounts'**, located below the user grid.
6. Click **'New'**, located below the customer grid.
7. Enter the new account/customer code.
8. If required, select an alternative role for the user when they operate on this account.
9. Set the value for the field **'Hide In Account Select'**:
   - **Ticked**: hides the account from the user's account list.
   - **Unticked**: displays the account as an option in the user's account list.
10. Click **'OK'** to save changes or **'Cancel'** to leave the user's details as is.

To Remove an Account from a User:

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> **'User Maintenance'** (**zUsers.aspx**).
3. Use the search bar above the grid to find the required user.
4. Select the user's record via radio button.
5. Click **'Multiple Accounts'**, located below the user grid.
6. From the customer grid, select the account/customer code to remove.
7. Click **'Delete'** to remove the account.

Multiple Role Access

Users are assigned an initial role on which they operate after login. If the user requires access to more than one role, the role is added to the user through **'User Maintenance'**. The user will then have the option to choose roles once logged in.

To Add a Role to a User:

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> **'User Maintenance'** (**zUsers.aspx**).
3. Use the search bar above the grid to find the required user.
4. Select the user's record via radio button.
5. Click **'Roles'**, located below the user grid.
6. Click **'New'**, located below the role grid.
7. From the drop down list, select the role to be added.
8. Click **'OK'** to save changes or **'Cancel'** to leave the user's details as is.

To Remove a Role from a User:

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> **'User Maintenance'** (**zUsers.aspx**).
3. Use the search bar above the grid to find the required user.
4. Select the user's record via radio button.
5. Click **'Roles'**, located below the user grid.
6. Click **'New'**, located below the role grid.
7. From the drop down list, select the role to be added.
8. Click **'OK'** to save changes or **'Cancel'** to leave the user's details as is.

IP Restrictions

It is possible to restrict a user so that they can only access the system from a certain IP Address. This can used to prevent the user from accessing the system outside the workplace network. A user can only be locked down to one IP Address.

To Set a User's IP Restriction:

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> **'User Maintenance'** (**zUsers.aspx**).
3. Use the search bar above the grid to find the required user.
4. Select the user's record via radio button.
5. Click **'Modify'**, located below the user grid.
6. Tick the box for the setting labelled **'Allow User IP Restriction'**.
7. Enter the IP address that the user can log in from into the field **'Restricted IP Address'**.
8. Click **'OK'** to save changes or **'Cancel'** to leave the user's details as is.

To Remove a User's IP Restriction

1. Login as an Administrator.
2. Navigate to **'Accounts'** --> **'User Maintenance'** (**zUsers.aspx**).
3. Use the search bar above the grid to find the required user.
4. Select the user's record via radio button.
5. Click **'Modify'**, located below the user grid.
6. Untick the box for the setting labelled **'Allow User IP Restriction'**.
7. Clear the IP address from the field **'Restricted IP Address'**.
8. Click **'OK'** to save changes or **'Cancel'** to leave the user's details as is.

System Administration User Details

User Email Address : test1@example.com

First Name : test

Surname : user

Deactivate User Account : ☐

Contact Phone Number : 07 55555555

Password :

Confirm Password :

Order Limit :

Initial Role After Login : B2C ▼

Rep Code :

Additional Rep Codes :

Customer Code : 22200178

Notification Email Address :

Account Administrator : ☐

Display Availability in Order Entry Screen : ☐

Orders Approved By :

User Organisation Name :

Default Home Page : Please Select .. ▼

Bypass Customer Budget : ☐

Can Assign All Roles? : ☐

Global Catalogue Access : Full ▼

Hide Alternative Roles : ☐

Allow Modify Company Templates : ☐

Allow User IP Restriction : ☐

Restricted IP Address :

Show all orders on all accounts requiring approval : Please Select .. ▼

Allow Price Override? : Please Select .. ▼

Enable Email Approval : ☐

Allow Password Reset : ☑

Related help

- MS Active Directory Setup Guide
- Microsoft Azure AD SSO
- User Logins & Registrations
- Users & Roles
- Website User Roles