Users & Roles

CMS Users

- How to delete a CMS user — Delete a CMS user on your platform. (video)
- CMS User Login with Two-factor Authentication — CMS user login requires two-factor authentication (2FA). Both password *and* an authenticating PIN must be entered.
- Custom CMS User Role Permissions — Add non-standard CMS user roles that cater to your business needs.
- Create CMS Users — Create new CMS Users for administrative functions on your platform.

Website Users

- Website User Maintenance in CMS — Add, edit and configure website users in the CMS.
- Website User Maintenance for Account Admins — Create a new website user while logged in as Website Admin.

- Website User Roles — About website user roles

Registrations

- B2C User Registration with Email Verification
- B2B User Registration

Logins

- Configure Website User Login Method
- Login Limits & Lockouts
- Global Login as any Website User
- Change Website User's Password Expiry Date
- User Password Rules
- Unlock a Website User's Account
- User Login Window
- Force User to Select Customer Upon Login
- User Logins & Registrations
- Update Session Timeouts
- Facebook Single Sign-on
- Google Sign In
- Keep Me Logged In
- Microsoft Azure AD SSO

Website User Functions

- Assign Multiple Customer Accounts to a User
- Bulk Import Website Users
- Change User Order Limits
- Change Website User's Login Expiry Date
- Change a Website User's Email Address
- Change a Website User's Password
- Copy Website Role for New Role
- Disable a Website User
- Delete a Website User
- Facebook Single Sign-on
- Global Login as Any Website User
- Google Sign-In
- Keep Me Logged In
- Lock a Website User to an IP Address
- Unlock a Website User's Account
- Update Session Timeouts
- User Debtor Integration
- User Impersonation
- User Login Window

Other resources:

Training videos