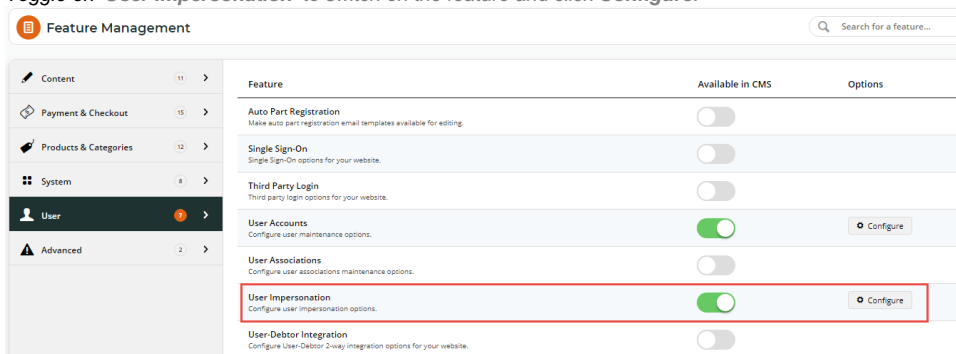# User Impersonation

Overview

With the User Impersonation feature, Administrators can allow certain Website Users, e.g., A, to switch to another User, B, who has shared Accounts, while logged into your website. In this way, A assumes the identity of B and has access to B's order, invoice and account information and functions. This feature is aimed at scenarios involving a 'super-User' such as a manager of large companies with multiple locations set up as separate sub-accounts (treated as individual Customers with their own separate Customer codes). For example, regional managers can login as those users who usually look after these sub-accounts. Or managers can access junior or absent staff's accounts to approve or complete tasks with customers, and look up orders, invoices and other transactional histories. All User switches are logged in the system.

The feature is set up as a User level Override. (See help on the Override facility for further information.) Should your business require implementation of overrides at Role or Customer levels, please consult Commerce Vision to explore these options.

Step-by-step guide

User Impersonation is set against a User.

1. As Administrator, navigate to **Settings Feature Management User**.

2. Toggle on **'User Impersonation'** to switch on the feature and click **Configure**.

3. **IMPORTANT -** In the 'User Impersonation Feature Settings', the default for **Enable User Impersonation** is OFF. Leave this disabled to ensure that User Impersonation is not switched on globally for all Users.
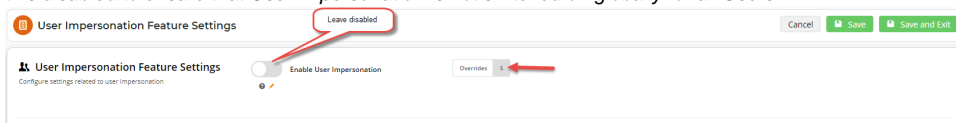
The Global Setting can also be accessed in the User Impersonation Feature Settings screen (when you click **Overrides**). Check that it is OFF. Check also that there are no overrides at the Role level.

4. To allow a User to have User Impersonation access, click **Overrides**. (**TIP -** Setting a user override means the added user overrides the global and role OFF setting.)

5. Click the **Add Override Setting** button.

6. From the **User** dropdown list, select the required user.

7. Toggle on **Override Value**.

8. Click **Confirm** to exit the screen.

9. Click **Save** to save the User Impersonation override. Notice the message informing you the override has been saved and the number of Overrides has increased by 1.

Enhancements Available on 4.41+

Limit checkout

Since 4.41 it's now possible to limit impersonators from checking out. Overrides are also possible, and apply to the user while impersonating. For example you can allow or disallow a user from checking out while they impersonate another user.

New Cart Ready email template

The "Cart Ready Email Template", gives a summary of what items have been added to the cart and emails the impersonated user, inviting them to finish their order.

Note: The email redirects will work better when the site has no ability to view the cart while logged out, this forces the receiver of the email to login, and then they're redirected to `/cart`

How User Impersonation works for the User

When the User logins to the website, they will see the Switch User icon.

Clicking on it opens the 'User Impersonation Select' list. This list contains all users with access to the same Customer accounts as the User. The User can click on the user they wish to impersonate.

After switching to the other User, the website now displays the impersonated User's view and dashboard. **NOTE -** An Impersonating User will not have access to Customer accounts they normally cannot access against their own user login.

👥 User Impersonation Select

Please select a user to impersonate from the list below, or use the search facility to look up the user.

| Email Address or Name | 🔍 Search | ◁ Clear |

◉ Contains ○ Starts With

(5 records. (1 page))

Email	First Name	Surname
sarah.lee@commercevision.com.au	Sarah	Lee
sarahl.testing@gmail.com	Testin1_Sarah	Lee
STAGE__123katie.koss@commercevision.com.au	Testing	1233

Additional Information

Minimum Version Requirements	4.31
Prerequisites	--
Self Configurable	Yes
Business Function	Users
BPD Only?	Yes
B2B/B2C/Both	B2B
Ballpark Hours From CV (if opting for CV to complete self config component)	Contact Commerce Vision
Ballpark Hours From CV (in addition to any self config required)	Contact Commerce Vision
Third Party Costs	n/a
CMS Category	Users

Related help

- User Impersonation
- Create CMS Users
- MS Active Directory Setup Guide
- Microsoft Azure AD SSO
- Users & Roles