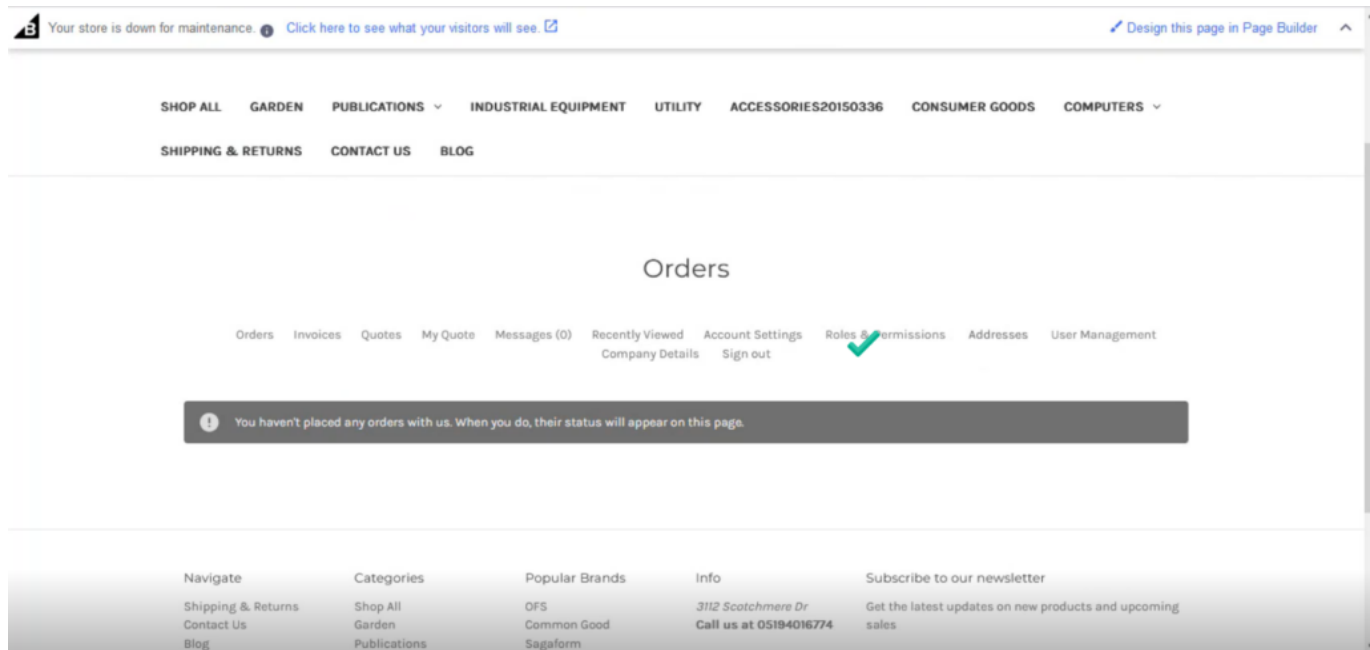


Managing Roles and Permissions



On the Front-End screen under the [Order] screen, you will have an option for [Roles & Permissions] for that user.



Roles & Permissions for Users in the Front End



Upon clicking on the Roles & Permission you will be redirected to the following screen.

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Company Roles

Orders Invoices Quotes My Quote Messages (0) Recently Viewed Account Settings **Roles & Permissions** Addresses User Management
Company Details Sign out

View 20 [Create New Role](#)

Name	No. of Users	Type	Action
 Admin	1	Predefined	 VIEW

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Company Roles Screen

For the [Admin user] it is predefined. You can create a new role from the [Create New Role] option. Upon clicking you will be redirected to the following screen.

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Company Role Form

OrdersInvoicesQuotesMy QuoteMessages (0)Recently ViewedAccount SettingsRoles & PermissionsAddressesUser Management

Company DetailsSign out

Role Information

Role NameREQUIRED

De

PermissionsREQUIRED


☐ All

☐ Manage Companies

☐ Manage Users

Company Role Form

Now on this page, you need to enter the Role name and the permission. You will find a list of permissions and you can give full or partial permission based on your business requirements to the user.

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Company Role Form

Orders Invoices Quotes My Quote Messages (0) Recently Viewed Account Settings Roles & Permissions Addresses User Management
Company Details Sign out

Role Information

Role Name REQUIRED

✓ salesdemo

Permissions REQUIRED


✓

- ☒ All
- ☐ Manage Companies
- ☐ Manage Users
- ☐ Manage Roles
- ☐ Manage Orders
- ☐ Manage Invoices
- ☐ Manage Quotes
- ☐ Manage Addresses


List of Permissions

Before you give permission, you need to enter the following details.

- **Order Credit Limit Value.**


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Order credit limit value REQUIRED



The 'Order Credit Limit Value' field can't be left empty.

Permissions REQUIRED

 ☒ All

- ☒ Manage Companies
 - ☒ View Company Information
 - ☒ Edit Company Information
- ☒ Manage Users
 - ☒ View Users
 - ☒ Add New User
 - ☒ Edit User
 - ☒ Delete User
- ☒ Manage Roles
 - ☒ View Roles
 - ☒ Add New Role
 - ☒ Edit Role
 - ☒ Delete Role
- ☒ Manage Orders
 - ☒ View Orders
 - ☒ Place Order

Enabling the List of Permissions