



## Users & Role Assignment

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A user refers to a record of a member that you have added to the system. Multiple users can have the same permissions and role assignment. However, one user can be assigned only one role.

### For example:

**User 1:** Alex

**User 2:** Maria

**Role Type 1:** Support Agent

**Role Type 2:** Sales Admin

In this case, both Alex and Maria can be assigned the role of Support Agent.

However, none of these two users can be assigned two roles at one time. Alex could either be a **Support Agent** in your system or a **Sales Admin**.

□ If there is a situation where a user is performing the duties of two roles, then you can create a new role with the permissions sets of both existing roles. And, then assign that new role to the user performing the tasks of two existing roles.

[Learn how to create a role and manage permissions.](#)

## Create a user & role assignment

To register a member of your staff as a system user, follow these steps.

1. On the **Users** page, click on the **Create User** button at the top right corner of the page.

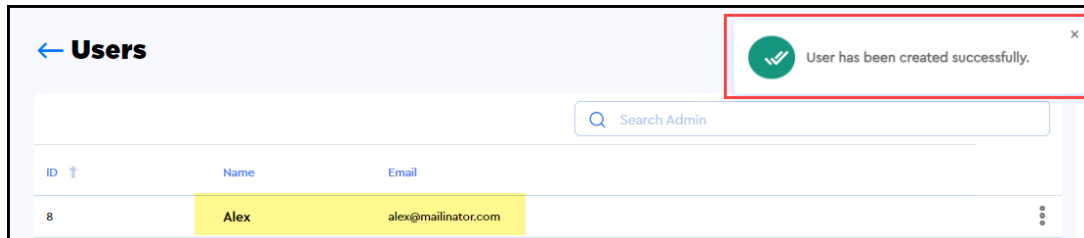
2. On the **Create User** page, enter the following information:

- **Role:** Use the dropdown menu to select one of the existing roles.
- **Name:** Enter the name of the user.
- **Email:** Enter a valid email address. The newly registered user will create an email at this address, containing the login information.
- **Password:** Enter a password of your choice. This will be the password the user will initially use to log into the system. The user will have the choice to change the password later on.
- **Confirm Password:** Enter the same password that you provided in the Password field.

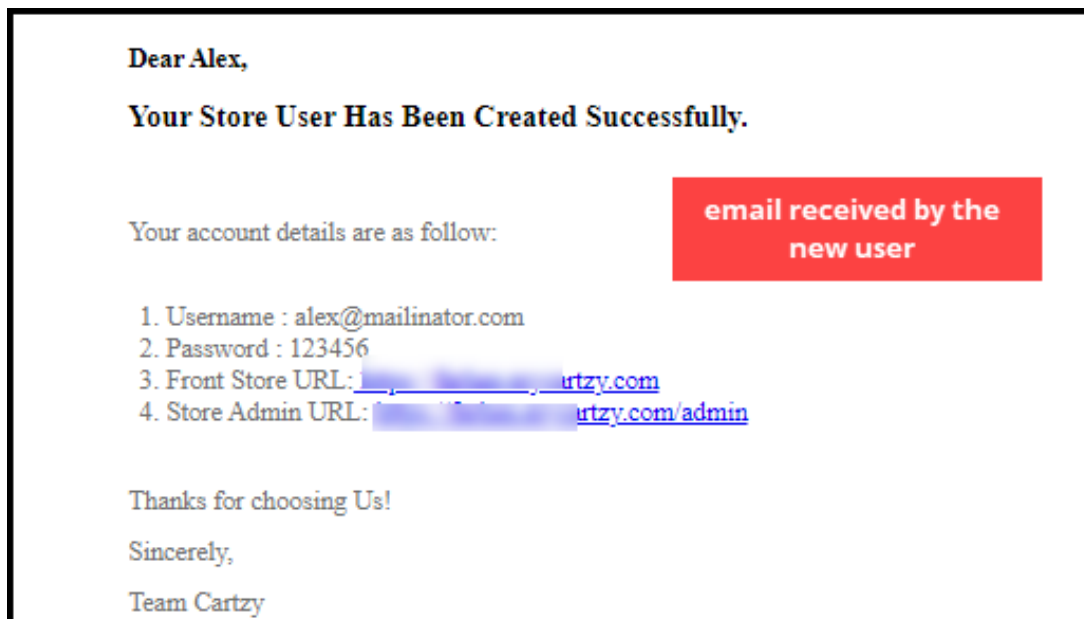
Once done, click the **Create** button.

3. Upon clicking the **Create** button, the following occurs:

- The new user is created successfully.
- A success **notification** appears at the top right corner of the page.
- The page refreshes to load the **Users** page, where the newly created user is listed at the top of the page.
- An email is dispatched to the user. The email contains the user login details along with the **Store Admin URL**.



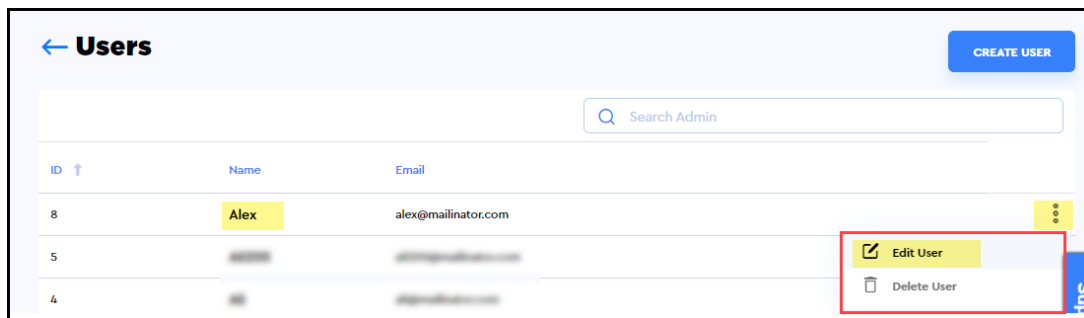
*(Email dispatched to the new user upon creating a new user)*



## Edit a user

To edit a user, follow these simple steps:

1. Click the **kebab menu icon** given against the user record on the **Users** page, and select the **Edit User** option.



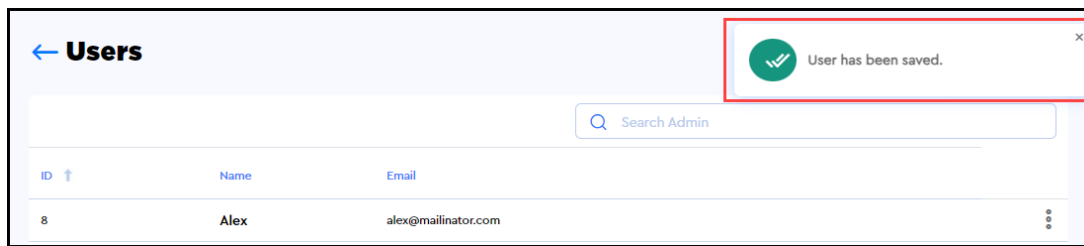
2. On the **Edit User** page, you can edit all the information that you provided at the time of creating the user.

- **Role:** You can assign a different role to the user.
- **Name:** You can update the name of the user.
- **Email:** You can enter a different email address for the user to receive emails.
- **New Password:** You can fulfill the password reset requests.

When the desired/requested changes are made, click **Save**.

The screenshot shows the 'Edit User' form. It has a back arrow and the title 'Edit User'. The form contains several fields: a 'Role' dropdown menu set to 'Sales Representative', a 'Name' text input field containing 'Alex', an 'Email' text input field containing 'alex@mailinator.com', a 'New Password' text input field, and a 'Confirm New Password' text input field. At the bottom left, there is a blue 'SAVE' button, which is highlighted with a red box.

3. Once the edits are saved, the page will be refreshed to display the **Users** page. Also, a **notification** popup containing the success message will appear at the top right corner of the page.

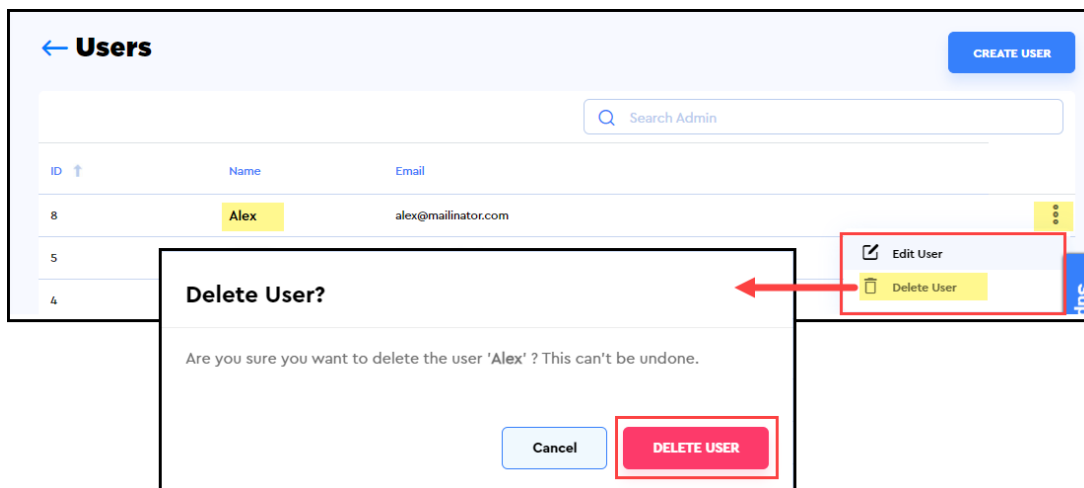


## Delete a user

A user record can be deleted in two simple steps as explained below.

1. Click on the **kebab menu icon** against the user name, and select the **Delete User** option from the dropdown menu.
2. On the **Delete User** confirmation popup, click the **Delete** button to delete the user.

⚠ The action of deleting a user is irreversible.



3. The user will be deleted successfully from the system and a **notification** popup containing the success message will appear at the top right corner of the page. The **Users** page will be refreshed to display the updated list of the users.

