Add a New User to the System

1. Navigate to Account-> Users Advanced module via the left menu bar.

| Q | Search | × | | | | | | | | | i | 3/29/2 | 202 |
|------------|-------------------|---|------------|---------------|--------------|-------------|-----------|----------|------------|-----------|-------------|----------------|---------|
| 0 | Workshop Bookings | | | | | | | | | | | | |
| 2 | Drivers | | | | | | | | | | ▲ CH | HEVIN : Tab: A | tive:A(|
| 9 8 | Accidents | > | Vehicles C |)verdue 🕴 _ | Due for R | eplacemen | ıt | | | | | Underutil | ized ve |
| • | Stock | > | | | Vehicle ID | License Pla | ite Mak | e | Model year | Odometer | ÷. | Vehicle ID | Dista |
| ۶ | Work Orders | > | 6 | | YPF40709 | 130811M | FREI | GHTLINER | 2000 | 863,205 | | 00002310 | 0 |
| ۲ | All Fuel | | | | XHF28089 | 130771M | FREI | GHTLINER | 1999 | 736,110 | | 01173339 | 0 |
| ۵ | Fuel | > | | | XPA27128 | 130715M | FREI | GHTLINER | 1999 | 732,550 | | 01173339 | 0 |
| 101 | Vehicle Expenses | > | | | YPF40711 | 130806M | FREI | GHTLINER | 2000 | 652,437 | | 01173339 | 0 |
| ٦ | Reports | > | | | YPF40710 | 130812M | FREI | GHTLINER | 2000 | 647,955 | . | 01173339 | 0 |
| 48 | Utilities | > | Pool Vehic | les in Shop | | | | | : | M and R | costs (| Rolling 12 M | os) |
| | Rentals | > | Vehicle ID | License Plate | Work Order N | lumber | Job date | Work Ord | er Status | LABOR COS | т | PARTS COST | |
| t | Import/Export | > | TEST3573 | 330TESTM | FW572990 | | 3/12/2021 | WIPEXT | | 1,977,292 | | 2,674,310 | |
| | Account | * | | | | | | | | | | | |
| | 9 Users Advanced | | | | | | | | | | | | |
| | Organizations | | | | | | | | | | | | |

2. From the Users Advanced screen, click the "+" to add a new user.

| ☆ Users Advanced | | | | | | | | | | | | Shi | ft + Space | २ + 🗉 × | 8 ? | 0 | |
|------------------|---------------------|-------------|---|-----------------------|------|--------------------|------|------------------|---------------|-------------------|-----------|-----------|------------------|--------------------|-------------|---------|--|
| Users Advanc | anced | | | | | | | | | | | | | | \$ I | | |
| Filter Columns | s 👻 Contain | s 🔻 | 0 | | Q | Clear | f(x) | Pivot Query | Inherits from | | | | | | | | |
| | Jsername IF ▼ | Driver Name | T | User name 🍸 | Inhe | rits from T | s | ystem access 🛛 🝸 | Expiry date T | Keywords T | Vehicle T | Drivers T | Repairs Y | Utilities T | Fuel module | Stock T | |
| 0 0 2 3 | SYSTEM ADMINISTRATO | R | | _System Administrator | | | S | | 11 | *,SYSADMIN | М | М | М | S | М | М | |

3. Complete the User ID, Password and User Name.

| Users Advanced Module Pas | ssword details Access Log INI Codes | Advanced Reports Documents | | | | |
|---------------------------------|-------------------------------------|----------------------------|---------------------------|------------|-----------------|-----|
| Username I | User name | | | | | |
| Password | Organization | ~ 0 | | | | |
| SAM II Employee Number | Driver Name | | | 0 | | |
| Mechanic | ✓ Localization | ¥ | | Role 👻 | | |
| Agency | ~ | 0 | | | | |
| Shop Location | 0 | | Default shop | | | |
| Job Title | | | | | | |
| Country | | ~ O | Locale | ¥ | | |
| Assignment Name | ~ O | | Company | ~ 0 | | |
| Network account | | | Bandwidth model | Auto 🗸 | | |
| Log in IP Address | | | Options Menu | ~ | | |
| System access | * | | Limited Functionality Use | No 🗸 | | |
| Homepage | | | | | | |
| Inherits from | ~ | | Session Timeout Time | 0 | | |
| Created By | CHEVIN:NIPA | 3/29/2021 | Changed By | | Thanged Date // | |
| Telephone | | | Email | | 8 | |
| Mobile Telephone | | | | | | |
| Expiry date | // | Reset Password | Password life (days) | 0 | | |
| User can change their password? | No 🛩 | | Portal delegate | ~ | | |
| Authorization Manager | ~ | | Authorization Limit | 0 | | |
| Authorization manager (2) | v | | Authorize | No 🛩 | | |
| Record Keyword | | | Failed Log ins | 0 | | |
| Keywords | | | | | | |
| Upload Signature | | Upload Home Page Logo | | | | |
| | | | | | Save | Can |

4. Complete other fields as needed. User can inherit from a template profile through "Inherits From" drop down option.

| Agency | ~ 0 | | | | | | | | |
|---------------------------------|------|--|--|--|--|--|--|--|--|
| Shop Location | 0 | | | | | | | | |
| Job Title | | | | | | | | | |
| Country | ~ 0 | | | | | | | | |
| Assignment Name | ~ 0 | | | | | | | | |
| Network account | | | | | | | | | |
| Log in IP Address | | | | | | | | | |
| System access | ~ | | | | | | | | |
| Homepage | | | | | | | | | |
| Inherits from | ~ | | | | | | | | |
| Created By | | | | | | | | | |
| Telephone | | | | | | | | | |
| Mobile Telephone | | | | | | | | | |
| Expiry date | // | | | | | | | | |
| User can change their password? | No 🛩 | | | | | | | | |

5. Save the record by clicking "Save".

| Password life (days) | 0 | |
|----------------------|------|---|
| Portal delegate | | ~ |
| Authorization Limit | | 0 |
| Authorize | No 🗸 | |
| Failed Log ins | 0 | |
| | | |
| | | |
| | | |
| | | |



6. System shows browse view where you can see the new user.

| Us | Users Advanced | | | | | | | | | | | | | | 6 | | | | |
|----|----------------|-------------|---------------|------------|------------|-----------------------|-------|----------|------|----------------|---------------|------------|------------------|-----------|-----------|-------------|-------------|---------|--|
| F | Filter Co | lumns 👻 | Contains | ~ | I. | | Q | Clear | f(x) | Pivot Query | Inherits from | | | | | | | | |
| | 1 | Userna | ne 17 📍 | Driver Nam | e T | User name 🛛 🝸 | Inher | its from | 5 | ystem access 🍸 | Expiry date T | Keywords T | Vehicle T | Drivers T | Repairs T | Utilities T | Fuel module | Stock T | |
| С |) 🗘 🛛 | SYSTEM | ADMINISTRATOR | 2 | | _System Administrator | | | S | | 11 | *,SYSADMIN | м | М | М | S | М | М | |
| C |) 🖸 G | 12 TEST-123 |) | | | TEST-123 SoMO | | | | | 11 | | w | Ū. | R | | | | |