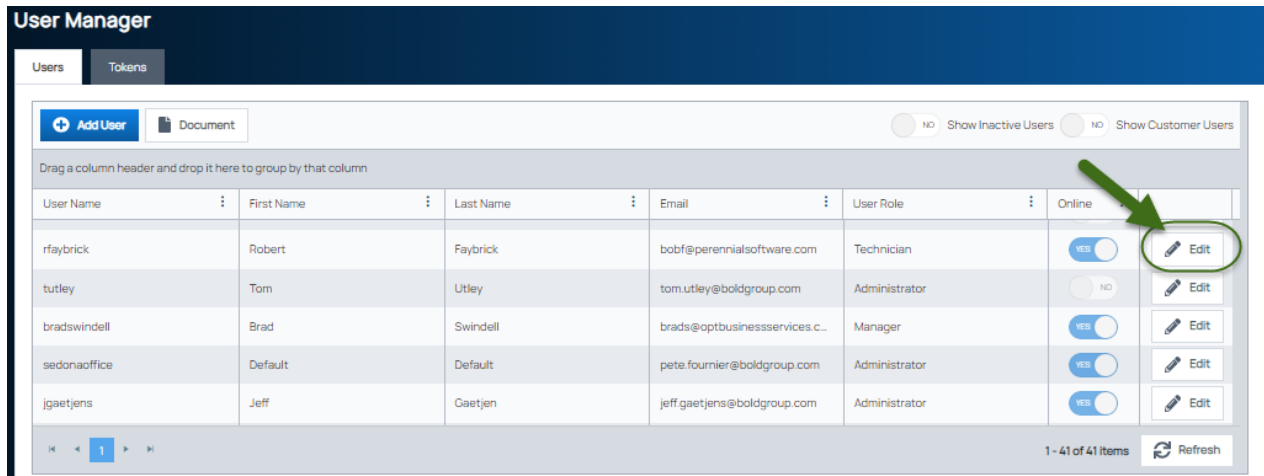


Edit a User

Last Modified on 01/23/2023 3:30 pm EST

To edit a User, browse to Setup > Company > User Manager.

The Users list is displayed. Locate the User you want to edit, and then click the Edit button (pencil icon).



The screenshot shows the 'User Manager' interface. At the top, there are tabs for 'Users' and 'Tokens'. Below the tabs, there is a search bar with 'Add User' and 'Document' buttons, and two toggle switches for 'Show Inactive Users' and 'Show Customer Users'. A table lists users with columns for User Name, First Name, Last Name, Email, User Role, and Online status. The 'Online' column contains toggle switches. To the right of each row is an 'Edit' button with a pencil icon. A green arrow points to the 'Edit' button for the user 'rfaybrick'. The bottom of the interface shows a pagination bar with '1' selected and a 'Refresh' button.

User Name	First Name	Last Name	Email	User Role	Online	
rfaybrick	Robert	Faybrick	bobf@perennialsoftware.com	Technician	YES	Edit
tutley	Tom	Utley	tom.utley@boldgroup.com	Administrator	NO	Edit
bradswindell	Brad	Swindell	brads@optbusinessservices.c...	Manager	YES	Edit
sedonaoffice	Default	Default	pete.fournier@boldgroup.com	Administrator	YES	Edit
jgaetjens	Jeff	Gaetjen	jeff.gaetjens@boldgroup.com	Administrator	YES	Edit

The Edit User Account form will be displayed. Make the necessary changes, and then click the Save button when finished.

Note: If the user's current User Role is Manager, Technician, or Salesperson and any changes are made to the permissions, the User Role automatically changes to Custom.

Edit User Account



Username • rfaybrick

First Name • Robert

Middle Initial • Middle Initial

Last Name • Faybrick

Phone • (760) 537-2121 Ext

Email • bobf@perennialsoftware.com

Timezone

User Role • Technician

Default Login • Time & Attendance

Site Theme • blueopal

User Online • ON

Inactivate • OFF

Inactive Date • month/day/year

Description

SedonaX • ON

Time & Attendance • ON

eForms • ON

Sales Automation • ON

SedonaOne Mobile app • OFF

Permissions

Services

Tokens

Miscellaneous

- | | |
|---|---|
| <input type="checkbox"/> Company Setup
(Access to all company setup information.) | <input type="checkbox"/> Supervisor
(Ability to see all work orders, proposals, and calendar appointments.) |
| <input type="checkbox"/> User Administration
(Manage all users and user roles.) | <input type="checkbox"/> Export
(Ability to export data to excel using the 'Export to Excel' button on various grids.) |
| <input type="checkbox"/> Quick Books
(Ability to export/reverse Quickbooks files.) | <input type="checkbox"/> Deliver All
(Ability to Deliver all Invoices and Credits. (Mark All as printed)) |
| <input type="checkbox"/> Deliver
(Ability to Deliver Individual Invoices and Credits. (Mark All as printed)) | <input type="checkbox"/> Financial
(Ability to view Financial Information.) |
| <input type="checkbox"/> Prevent Tag Creation
(Prevent the User to Create Tags.) | <input type="checkbox"/> Prevent Altering Taxable Status
(Prevents Altering Taxable Status on Parts and Items) |