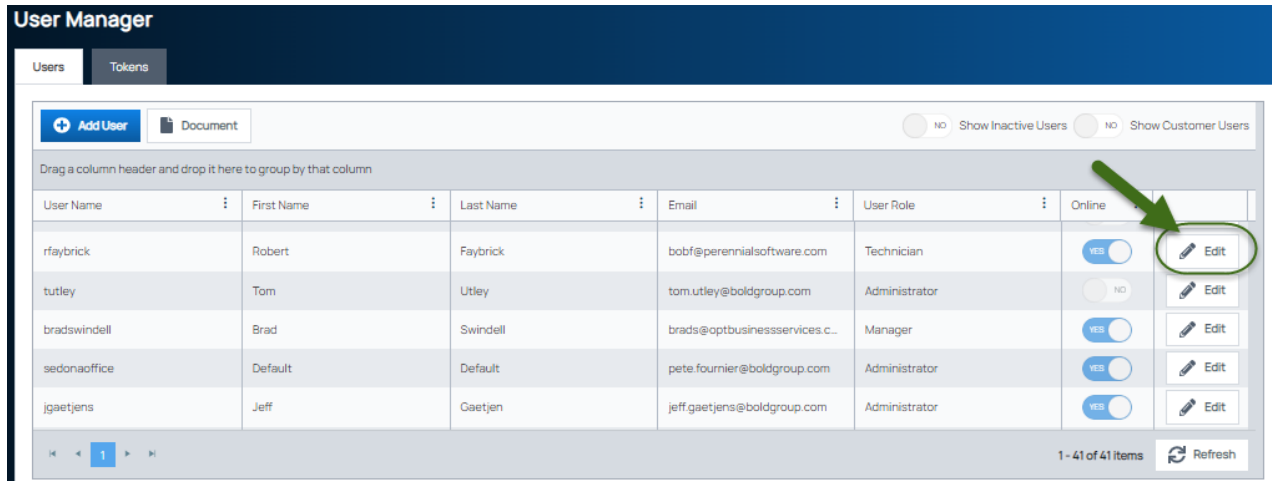


Edit a User

Last Modified on 06/04/2025 9:21 pm EDT

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 are buttons for 'Add User' and 'Document'. To the right, there are toggle switches for 'Show Inactive Users' and 'Show Customer Users'. Below these, there is a text prompt: 'Drag a column header and drop it here to group by that column'. The main area is a table with the following columns: 'User Name', 'First Name', 'Last Name', 'Email', 'User Role', 'Online', and 'Edit'. The table contains five rows of user data. A green arrow points to the 'Edit' button (pencil icon) in the 'Edit' column for the first row, which corresponds to the user 'rfaybrick'.

User Name	First Name	Last Name	Email	User Role	Online	Edit
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

At the bottom of the table, there is a pagination bar showing '1 - 41 of 41 items' and a 'Refresh' button.

The Edit User Account form opens. 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 • rfabrick

First Name • Robert

Middle Initial • Middle Initial

Last Name • Faybrick

Phone • (760) 537-2121 Ext.

Email • bobf@perennialsoftware.com

Timezone • [Dropdown]

User Role • Technician

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)

Note: If you assign a custom role to the user, the **Timezone** dropdown is disabled. The time zone is determined by the custom role itself. Custom roles are set up on the Setup > Company > User Manager > Custom User Roles tab.