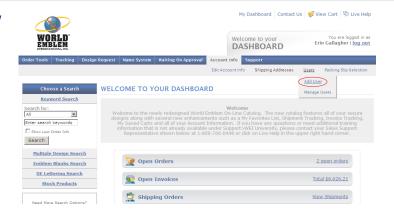
TRAINING GUIDE

Setting up New Users

1



Only Managers have access to set up User Profiles. To set up a new user, Go to Account Info > Users > Add User.

2

General Information	
First Name*	John
Last Name*	Doe
Company Name*	Promo/World Emblem
Phone (111-111-1111)	555-555-5555
Fax (111-111-1111)	
Mobile (111-111-1111)	
Email	jdoe@worldemblem.com
Send New User Email Confirmation Login	C Send / Send Again G Sent / Do Not Sen
Username*	jdoe
This username is valid.	
Password*	•••••
Confirm*	•••••
Order Approval Information	
Require Order Approval	C Yes [⊙] No
Single Order Limit (\$)	(\$0.00)
Monthly Order Limit (\$)	(\$0.00)
User Roles	
Available : Se	elected :
User Role - All Manager User Role - All Sales Rep	Jser Role - All Purchaser

Enter the information for the new user. Only those fields with an * are required. Enter the username and password (twice). When setting up the user, they can be required to get Manager's approval for orders over a specific dollar amount. Select the role and move it to the selected box on the right. The role selected will determine their access and functionality in the catalog. Each role is listed with their rights under WEI University. Available users and their rights can be customized by location.

3

MANAGE USER	LOGINS				Add User Logins
Group By: Search: Search Cl	All	v		## View Saved Searches	Results per page: 50 Results per page: 50
Showing 1 - 1 of 1 result	s				Page: 1
Name	Type	Company	¢ Email	‡ Phone	Actions
Erin Gallagher Username: 305300	Customer	Promo/World Emblem	egallagher@worldemblem.com	305-899-9006	Edit Password Disable
Showing 1 - 1 of 1 result	S				Page: 1

Managers also have access to view and edit all users for that particular location. Go to Account Info > Users > Manage Users to view and edit passwords, edit accounts or disable accounts.

