

Assigning staff user roles and access to customers

Requirements:

- The staff user must have been created.
- You must have a system role that includes the Manage All Accounts right.

1. On the home page, click **Administration**.
 2. In the **Administration** area, click **Users**.
 3. In the **Name** column, right-click the required staff user's name and from the menu that appears, select **Edit User**.
 4. In the Edit Staff Users window, in the left pane, select **Default User Role** and locate the type of role you want to change.
 - **System Role:** Click the role and select the appropriate system role from the list. Select **None** if you do not want this staff user to have any system-level administrative rights.
 - **Admin Role:** Click the role and select the appropriate administrative role from the list. Select **None** if you do not want this staff user to have any customer-level administrative rights.
 - **Default Job Role:** Click the role and select the appropriate job role from the list. Select **None** if you do not want this staff user to have any customer-level job rights.
- Tip:** To see which rights are included in a role, hover your cursor over the specific role.
5. To enable access to customers, perform one of the following steps:

To Give Staff User Access To	Do This
All jobs for all customers in the system	Select the Access All Customers check box.
Jobs for specific customers	a. Clear the Access All Customers check box. b. Click Customer Access. c. In the list of customers, select the check box next to the customers that this user should have access to, and click OK. d. Under each customer name, select the appropriate roles for the staff user. e. Click Update.