Roles, Access Rights

This view allows user to define access rights for different users. Below actions are available under "Roles, Access Rights":

Create the role, modify, search and delete

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 Sign & un-assign user to/from the role.

G→ Apply system features access level for the role.

Roles, Access	Rights ×							
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Role Code A	Pole N		(C	Description	Role Name			Role <u>C</u> ode
ROO	Demo-view	onne		View access only	Demo-view			R00
R02	Company User				Sub Pala Of			
R04	Sales Representative				Sub Kole Of			Allow Sub Roles
R05	Inventory Department						•)	
R07	Invoicing Clerk				Access Level			
R08	Marketing				: 0			
R09	Admin			Company Admin	Description			
R10	Account Supervisor				View access or	nlv		
R11	Accounts Executive				Then beechs of	,		
R12	Finance Manager							
R13	Accounts Receivable			Accounts Technician 2			Counter Name	Saura Dalata
R14	Accounts Payable			Accounts Techincian 1			Create Ivew	Jave Deveit Deveet
R15	Accounts Admin Cler	¢						
R16	Sales Manager			~				
1/25								
System Feature Ac	cess System Users	- 9	0	Colort All	Decelect All			
Organiz	ation Modules		~	Select All	DESERCTAI		Addi	tional Access Controls
Organization M	lodule			Organization Settings				
Others		1		Default Settings		11		
HR Module		n k	U	Deradic Sectings		-		
Masters		11		Application Settings				
Transaction	s	11	-					
Approvals		- 21		Accounts Settings		:		
Web				HR Settings		1		
Reports			-					
Accounts Mode	ule			Sales Settings				
Masters		_ [Purchase Settings				
Transaction	s		-	r dienose settings				
Report Cust	tomizers	. 1		Inventory Settings				
Accounts R Web Report	eports ts			Supply Chain Settings		1	(An	nhy Revert
	*			*		1	(np	

Roles, Access I	Rights ×							
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Role Code A	Role Name	Description	17	Role Name			Role <u>C</u> ode	
R08	Marketing		n De	Demo	-view		R00	
R09	Admin	Company Admin	-	Sub Re	le Of			
R10	Account Supervisor			Jubin			Allow Sub Roler	
R11	Accounts Executive							
R12	Finance Manager			Access	Level			
R13	Accounts Receivable	Accounts Technician 2		0				
R14	Accounts Payable	Accounts Techincian 1		Deceri	stics			
R15	Accounts Admin Clerk			View	scere only			
R16	Sales Manager			eve a	cccs only			
R17	Sales Operations							
R18	Sales Admin Assistant			-	-			
R19	Merchandising Manager				Cri	eate New	Save Bevert	Delete
R20	Buyer Manager							
R21	Buyer Assistant		~					
1/25								
Available Users	Cess System Osers			1	Assigned Users			
Ø [Only Active Users 🗸			User Name 🔺		Email	0
	A A A A A A A A A A A A A A A A A A A	E	100		Demo1	d	emo@samooha.com	1
201	iser Name A	Email damo@samacha.com	-		Demo2	d	emo@samooha.com	r
Accounts Admin C	lark	demo@samooha.com	-		Demo3	d	emo@samooha.com	_
Accounts Aumin C	ICIA	demo@samooha.com			Demo4	d	lemo@samooha.com	
Accounts Pavable		demo@samooha.com	_					
Accounts Receivab	le .	demo@samooha.com	-					
Rover Assistant		demo@samooha.com		-	1			
Chris Wirianto		chriswirianto@samooba.com						
Christina Soh		christinasoh@samooha.com						
Company Admin		demo@samooha.com						
Elvy		elvv@samooha.com						
Finance Manager1		demo@samooha.com	~	1				
Total 40 (Of 50) re	cords				Total 4 records			
10101 10 (01 20) 10	corosi		_	1	Total Trecordan			

Role Name	Name of role	Y
Role Code	Custom code for the role	Y
Sub Role of	Select the main role, for grouping purpose	Ν
Access Level	Access level in the system	Y
Description	Description	Ν

Create New Roles, Access Rights:

 Click on "Create New" button at the middle of the screen

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Role Code A	Role Name	Description	14	Role <u>N</u> ame		Role <u>C</u> ode
108	Marketing		^	Demo-view		R00
R09	Admin	Company Admin	5	Sub Role Of		
R10	Account Supervisor				~	Allow Sub Roles
R11	Accounts Executive		0			0
R12	Finance Manager			Access Level		
R13	Accounts Receivable	Accounts Technician 2		: 0		
814	Accounts Payable	Accounts Techincian 1		Description		
815	Accounts Admin Clerk			View access only		
R16	Sales Manager					
R17	Sales Operations					
R18	Sales Admin Assistant				Counter Name	Same Change C
R19	Merchandising Manager				Create New	2ave Kevert
R20	Buyer Manager					
821	Buyer Assistant		~			

2. Fill up the information on top right of screen.

3. Optional: Tick the "Allow Sub Roles" box to set the role as (parent) grouping role

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Role Code A	Role Name	Description	I	Role Name	Role <u>C</u> ode
.08	Marketing		^	Accounts Receivable	R13
09	Admin	Company Admin	0	Sub Role Of	
10	Account Supervisor				✓ M Allow Sub Roles
11	Accounts Executive				
12	Finance Manager			Access Level	
13	Accounts Receivable	Accounts Technician 2		0	
14	Accounts Payable	Accounts Techincian 1		Description	
15	Accounts Admin Clerk			Accounts Technician 2	
16	Sales Manager				
17	Sales Operations				
18	Sales Admin Assistant			Contra	
19	Merchandising Manager			Create	Tiew Save Revert
20	Buyer Manager				
21	Buyer Assistant		~		

4. Optional: User may select a parent role from "Sub Role Of" drop down list, if the role is a grouping role (see steps #3 above).

Role Code A	Role Name	Description (1)		Role Name	Role Code
100	Demo-view	View access only	^	Accounts Payable	R14
102	Company User			Sub Role Of	
104	Sales Representative			R13 - Accounts Receivable	Allow Sub Roles
205	Inventory Department				
R07	Invoicing Clerk			Access Level	
108	Marketing			: 0	
109	Admin	Company Admin		Description	
10	Account Supervisor			Accounts Techincian 1	
111	Accounts Executive			in the second se	
12	Finance Manager				
13	Accounts Receivable	Accounts Technician 2			
14	Accounts Payable	Accounts Techincian 1		<u> </u>	Teste Tien Jave Deven Deter
15	Accounts Admin Clerk				
16	Sales Manager		~		
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5. Click on "Save" button to save

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Role Code A	Role Name	Description	[]	Role Name		Role <u>C</u> ode
100	Demo-view	View access only	^	Accounts Payable		R14
802	Company User			Sub Role Of		
804	Sales Representative			R12 - Finance Manager	~	Allow Sub Roles
:05	Inventory Department					0
07	Invoicing Clerk			Access Level		
08	Marketing			: 0		
09	Admin	Company Admin		Description		
10	Account Supervisor			Accounts Techincian 1		
:11	Accounts Executive					
12	Finance Manager					
13	Accounts Receivable	Accounts Technician 2		6	Counter Manue	Sava Bauart Dal
14	Accounts Payable	Accounts Techincian 1			Create New	
15	Accounts Admin Clerk					
.16	Sales Manager		~			

Assign & Un-Assign User to/from Roles

1. Click on a role in the list on top left of screen.

2. On "System Users" tab, select a user name from the "Available Users" list and click on the " is " button to assign the user for the role.

3. Select a user name from the "Assigned Users" list and click on "

Available Users				Assigned Users		
0	Only Active Users			User Name A	Email	1
User Name A	Email	1	1	Accounts Payable	demo@samooha.com	
3PL	demo@samooha.com	^				
Accounts Admin Clerk	demo@samooha.com					
Accounts Executive	demo@samooha.com					
Accounts Receivable	demo@samooha.com	-				
Buyer Assistant	demo@samooha.com		A			
Chris Wirianto	chriswirianto@samooha.com		~			
Christina Soh	christinasoh@samooha.com			1		
Company Admin	demo@samooha.com					
Demo1	demo@samooha.com					
Demo2	demo@samooha.com					
Demo3	demo@samooha.com	~	-			

Modify Roles, Access Rights:

1. Select the role to modify from the list on top

left of screen.

- 2. Update the information required
- 3. Click on the "Revert" button to undo changes.
- 4. Click on the "Save" button to save the changes

Delete Roles, Access Rights:

1. Select the role to delete from the list on top left of screen.

2. Click on "Delete" button at the bottom of screen

3. Click on "Yes" button on the pop-up window to confirm record deletion.

Role Code A Role Name		Description 🛱		Role Name Role Code				
R00	Demo-view	View access only	^	Accounts Payable	R14			
R02	Company User		0	Sub Role Of	Deleting record?	×		
104	Sales Representative			R12 - Finance Manager				
105	Inventory Department							
107	Invoicing Clerk			Access Level	Do you really wish to	delete this record?		
108	Marketing			0				
09	Admin	Company Admin		Description	<u>Y</u> es	No		
210	Account Supervisor			Accounts Techincian 1	-			
:11	Accounts Executive			recounty reciment i				
12	Finance Manager							
13	Accounts Receivable	Accounts Technician 2		10.				
14	Accounts Payable	Accounts Techincian 1			Create New	Save Revent Dele		
15	Accounts Admin Clerk							
16	Sales Manager		~					

Apply System Features Access Level for Roles:

1. Select the role to modify system features access level from the list on top left of screen.

2. Select a module from list of "Organization Modules" in the "System Feature Access" tab

3. Select a transaction from list of the selected module's transactions to make changes

4. Tick a transaction checkbox to give "*VIEW*" access to role. Or untick a transaction checkbox to remove

"VIEW" access to role

5. Tick an access control checkbox to give "Create", "Modify", "Approve", or "Delete" access to role. Untick an access control checkbox to remove specific access to role



6. Click on "Apply" button at the bottom of screen to apply the changes to the system feature access level