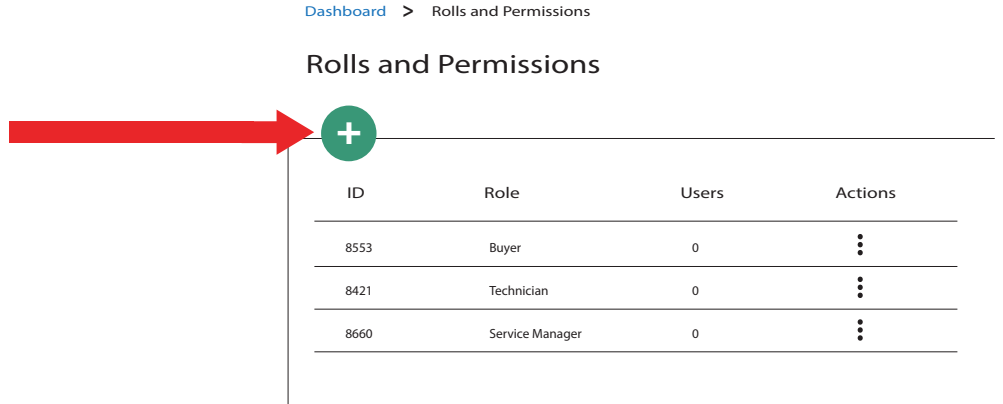# MANAGING USERS

Adding and managing users can only be done by your company's peirce.com Admin person. Each company can have only one Admin person. Set up roles and permissions and add users to your account.
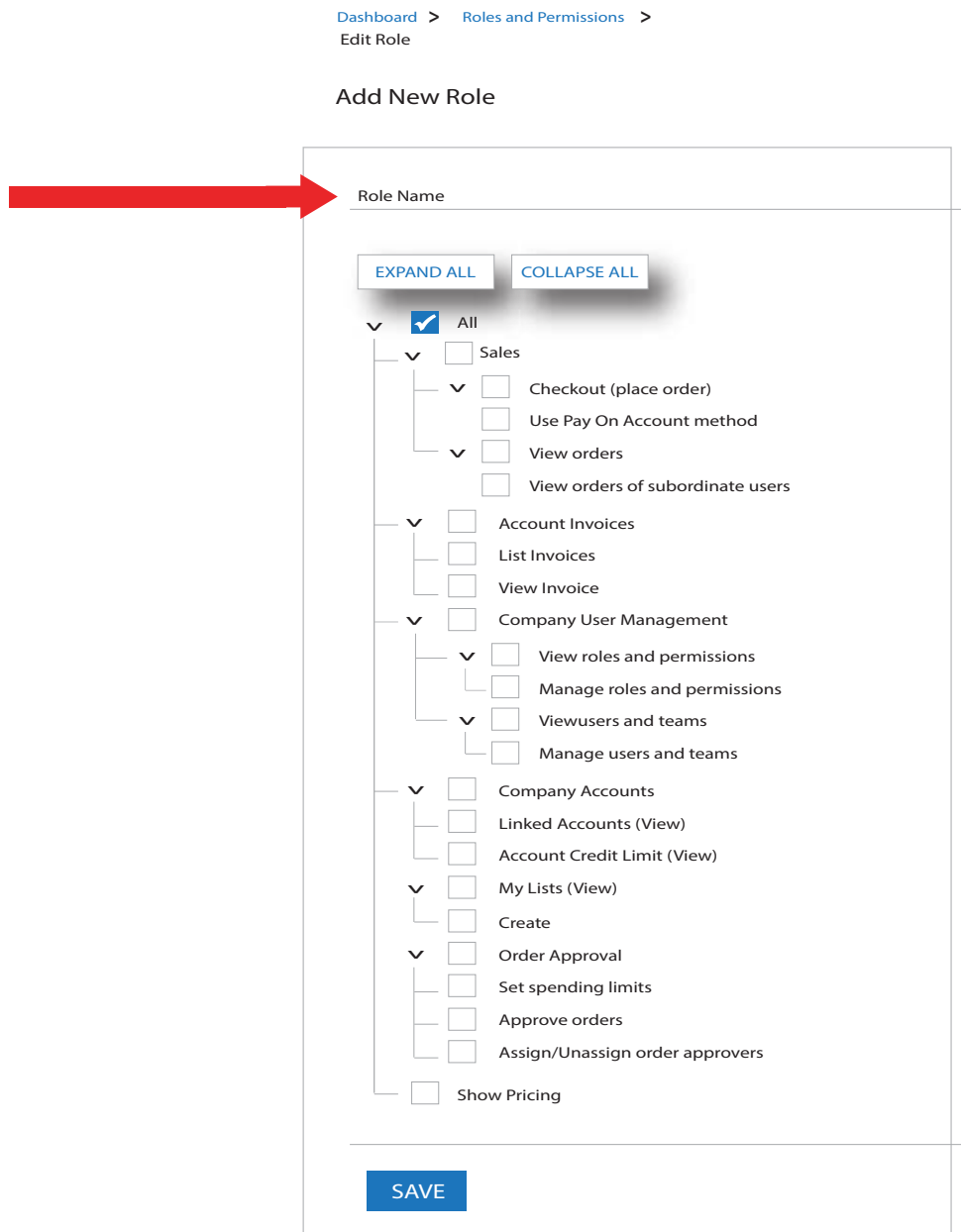
1 Company Admin needs to sign in to his/her peirce.com account and go to the "Rolls and Permissions" section of the dashboard.
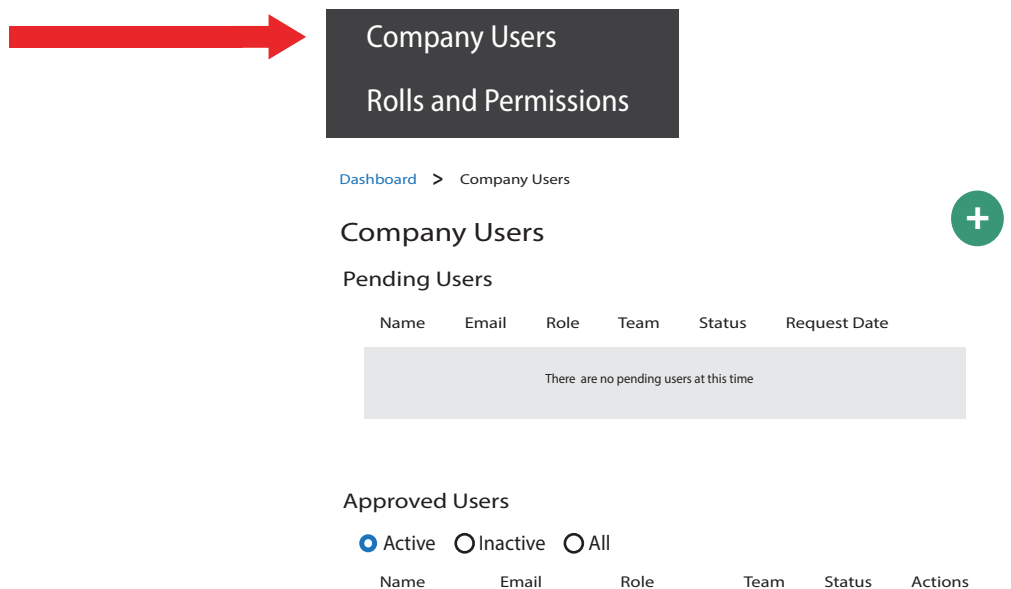
Company
Linked Accounts
Company Users
Roles and Permissions

2 To add rolls and assign permissions to that role, click the green + button.

Dashboard > Rolls and Permissions

Rolls and Permissions

ID	Role	Users	Actions
8553	Buyer	0	⋮
8421	Technician	0	⋮
8660	Service Manager	0	⋮

3 The Company Admin will now be able to enter new role names and assign permissions to those roles by checking the boxes beside each permission. When complete, click "SAVE".

Dashboard > Roles and Permissions > Edit Role

Add New Role

Role Name

EXPAND ALL   COLLAPSE ALL

- ☑ All
  - ☐ Sales
    - ☐ Checkout (place order)
    - ☐ Use Pay On Account method
    - ☐ View orders
    - ☐ View orders of subordinate users
  - ☐ Account Invoices
  - ☐ List Invoices
  - ☐ View Invoice
  - ☐ Company User Management
    - ☐ View roles and permissions
    - ☐ Manage roles and permissions
    - ☐ Viewusers and teams
    - ☐ Manage users and teams
  - ☐ Company Accounts
  - ☐ Linked Accounts (View)
  - ☐ Account Credit Limit (View)
  - ☐ My Lists (View)
  - ☐ Create
  - ☐ Order Approval
  - ☐ Set spending limits
  - ☐ Approve orders
  - ☐ Assign/Unassign order approvers
  - ☐ Show Pricing

SAVE

4 New users can now be added by the Company Admin by selecting "Company Users" from the dashboard and then clicking ➕

Company Users
Rolls and Permissions

Dashboard > Company Users

Company Users   ➕

Pending Users

Name	Email	Role	Team	Status	Request Date
		There are no pending users at this time			

Approved Users

○ Active ○ Inactive ○ All

Name	Email	Role	Team	Status	Actions

5 Complete the requested information in the "New User Request" window, review for accuracy and click "SUBMIT REQUEST". The new user will receive an email with their username and password.

New User Request

User will be added to the system after Peirce-Phelps admin review.

Job Title *   User Role *
                               Buyer

First Name *   Last Name *

Email *

Phone Numberl *

Status
Active

SUBMIT REQUEST   CANCEL

Questions? Contact websupport@peirce.com