

Add and Manage Office Users

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Office users can access different features based on their assigned permissions. This guide covers how to add, edit, activate, and delete office users.

Accessing Office Users

1. Go to **Settings > Office Users**.

Creating an Office User

1. Click **+ Add New** to open the **Add Office User** page.

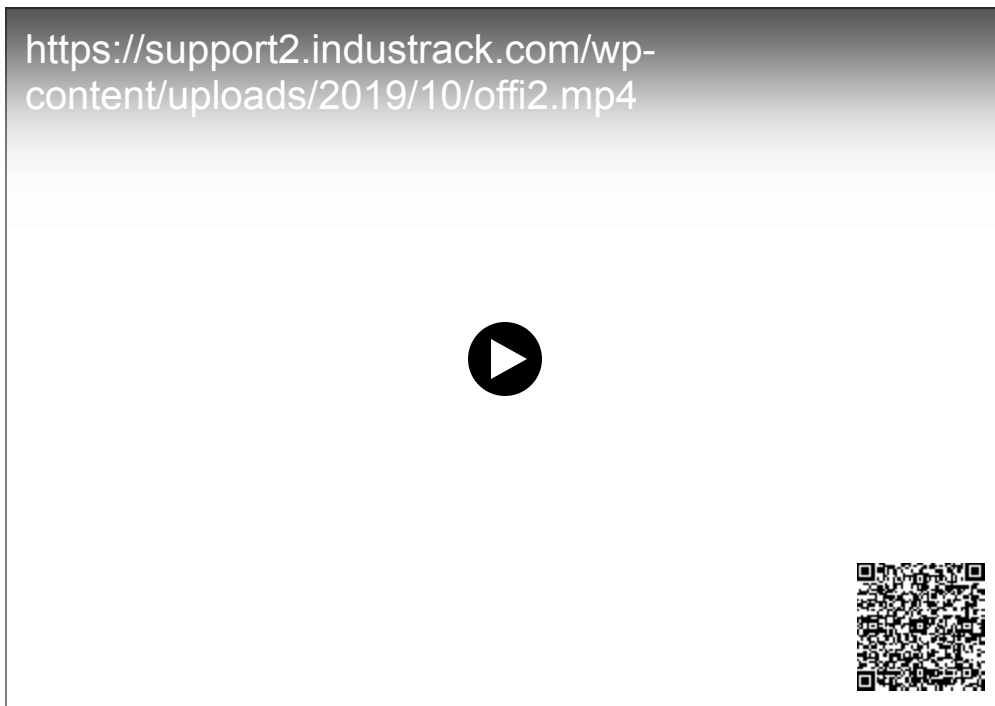


2. Fill in the user's details under different tabs:

- **General** – Create the user's profile.
- **Permissions** – Assign access levels.
- **Email** – Set up email integration.
- **Notifications** – Configure reminders.
- **User Preferences** – Assign default templates.

General Tab (User Profile)

- **Login (required)** – Enter the user's email address.
- **Password (required)** – Set a password.
- **Role** – Assign a role:
 - **View Only** – Can view but not edit.
 - **Edit and View** – Can edit and view assigned modules.
 - **Admin** – Has full access to settings.
 - **Customize** – Set custom permissions.
- **Address** – Defaults to company address but can be edited.
- **Contact Details** – First name, last name, phone number, and mobile provider (needed for text alerts).



Permissions Tab (Access Control)

- Assign access based on role (View Only, Edit & View, Admin, or Custom).
- Select access for features like:
 - **Calendar** – Choose which calendars the user can access.
 - **Map Visibility** – Select which vehicles the user can track.

When the Office User's Role is set to Customize, the Permission Tab will change and it will allow you to customize each Module permission.

This guide explains how to set user permissions for different modules in the system. Permissions control what a user can do in each module:

- **View** – The user can see the module but cannot make changes.
- **Edit** – The user can view and make changes.
- **No Access** – The user cannot access the module.

Module Permissions

Scheduling

- Users need access to a selected calendar.
- No Access removes access to Calendar settings.

Map

- Options: View or No Access.
- Users can only view the map; no editing allowed.

Timesheet

- Options: No Access, View, or Edit.
- Edit allows the user to modify timesheets for field employees.

Messaging

- Options: No Access, View, or Edit.
- Edit allows the user to create and send messages via the OneTrack website.

Estimation

- Options: No Access, View, or Edit.

- Edit allows the user to create and manage estimates.

Invoices

- Options: No Access, View, or Edit.
- Edit allows the user to manage and edit invoices.

Inventory

- Options: No Access, View, or Edit.
- Edit allows the user to manage inventory, including items, services, and equipment.

Forms

- Options: No Access, View, or Edit.
- Edit allows the user to create, edit, and delete forms.

Contacts

- Options: No Access, View, or Edit.
- Edit allows the user to add new customers and manage groups.

Payment Processing

- Options: No Access, View, or Edit.

Dashboard

- Options: No Access, View, or Edit.
- Edit allows the user to access and manage the dashboard.

Integration

- Options: No Access, View, or Edit.
- Edit allows the user to set up integrations (e.g., QuickBooks, Stripe, Ring Central, Email).

Membership/Service Agreement

- Options: No Access, View, or Edit.
- Edit allows the user to manage service agreements and memberships.

Import

- Enabling this allows users to import data from other systems into Industrack.

Reports

- Users can view and generate reports.

QB Integration

- Enabling this allows users to integrate Industrack with QuickBooks.

Warehouses

- Options: No Access, View, or Edit.
- Edit allows users to manage warehouse information.

Inventory Tracking with QR/Bar Codes

- Users can track inventory using QR and barcodes.

Customer Notification

- Allows users to manage customer notifications.

Vehicle Tracking

- Options: ON or OFF.
- When ON, users can view field vehicles on the map.

Settings

- Options: No Access, View, Edit, or Super Admin.
- Edit allows changes to module settings but not user settings.
- Super Admin grants full access, including user settings.

Additional Features

Enable All

- Grants View access for Maps, Full Access for Settings, and Edit access for all other modules.

Allow Deleting Items

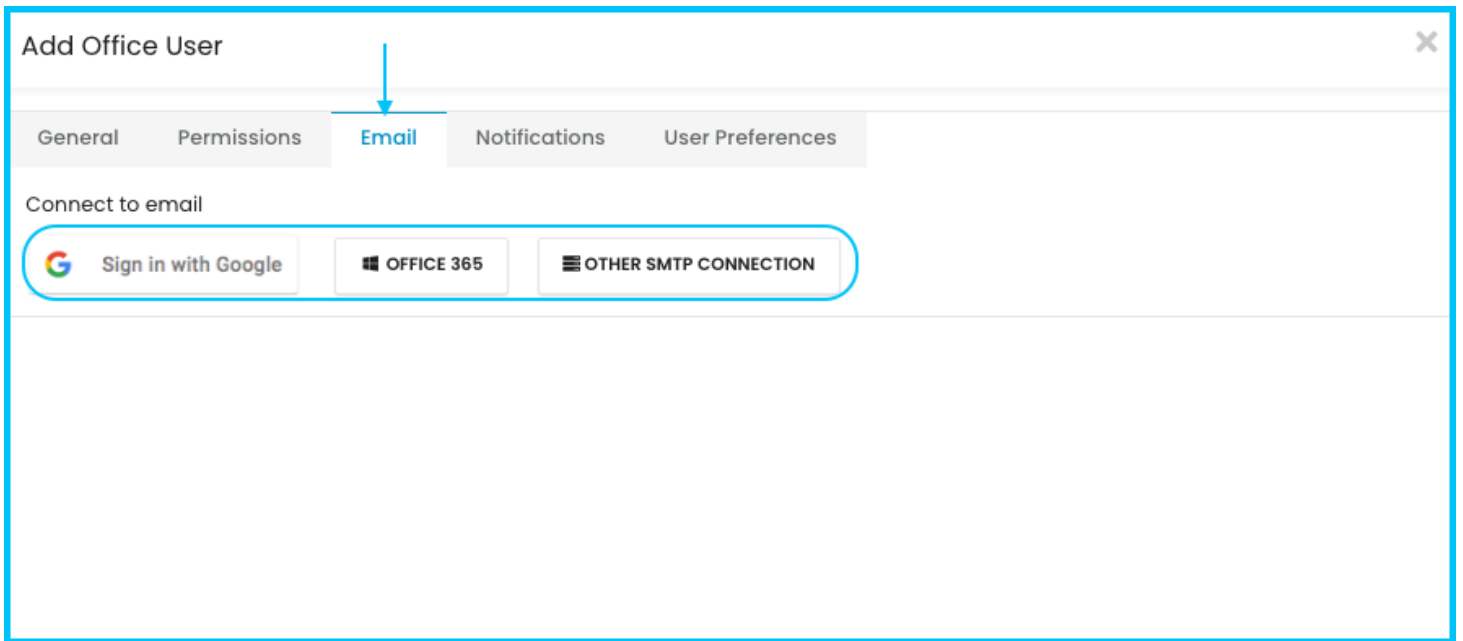
- When enabled, users can delete items in modules they have Edit access to.

This guide helps ensure the correct access levels are assigned to users while maintaining system security and control.



Email Tab (Integration)

Configure email settings for communication.



Notifications Tab (Reminders)

- Enable notifications for Jobs, Invoices, Estimates, and more.
- Set when reminders should be sent.
- Notifications can appear as emails, pop-ups, or both.



User Preferences Tab

- Default templates apply automatically when the user creates invoices or estimates.
- Assign default login screens and templates.

Add Office User

General Permissions Email Notifications **User Preferences**

Default starting screen

for Login Map

Default Templates

for Estimate	Company Default
for Estimate Email	Company Default
for Invoice Email	Company Default
for Invoice Reminder Email	Company Default
for Service Agreement Email	Company Default
for Membership Email	Company Default

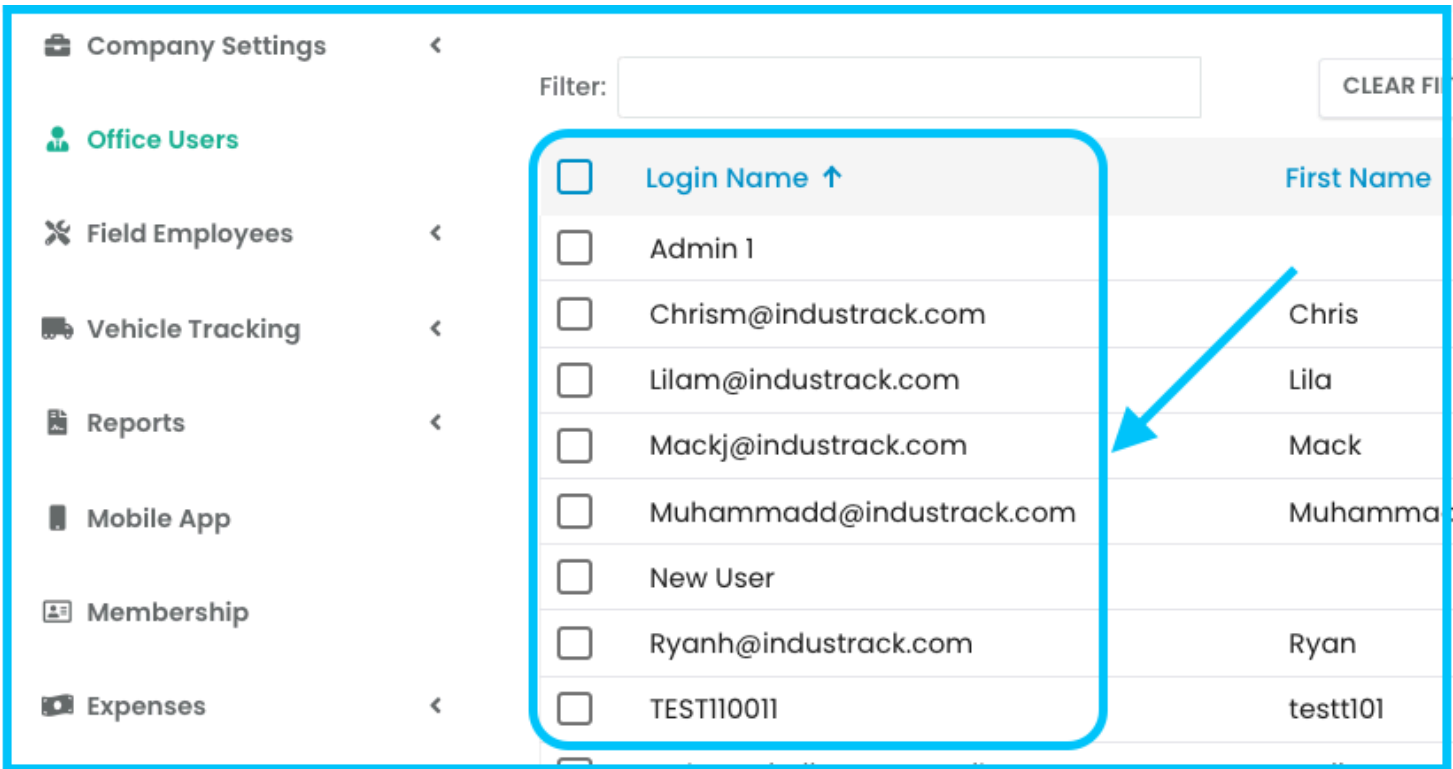
CLOSE SAVE

Final Step

- Click **Save** to create the user. The user will be added to the list and set to **Active** by default.

Updating an Office User

- Find the user in the list and click their row.

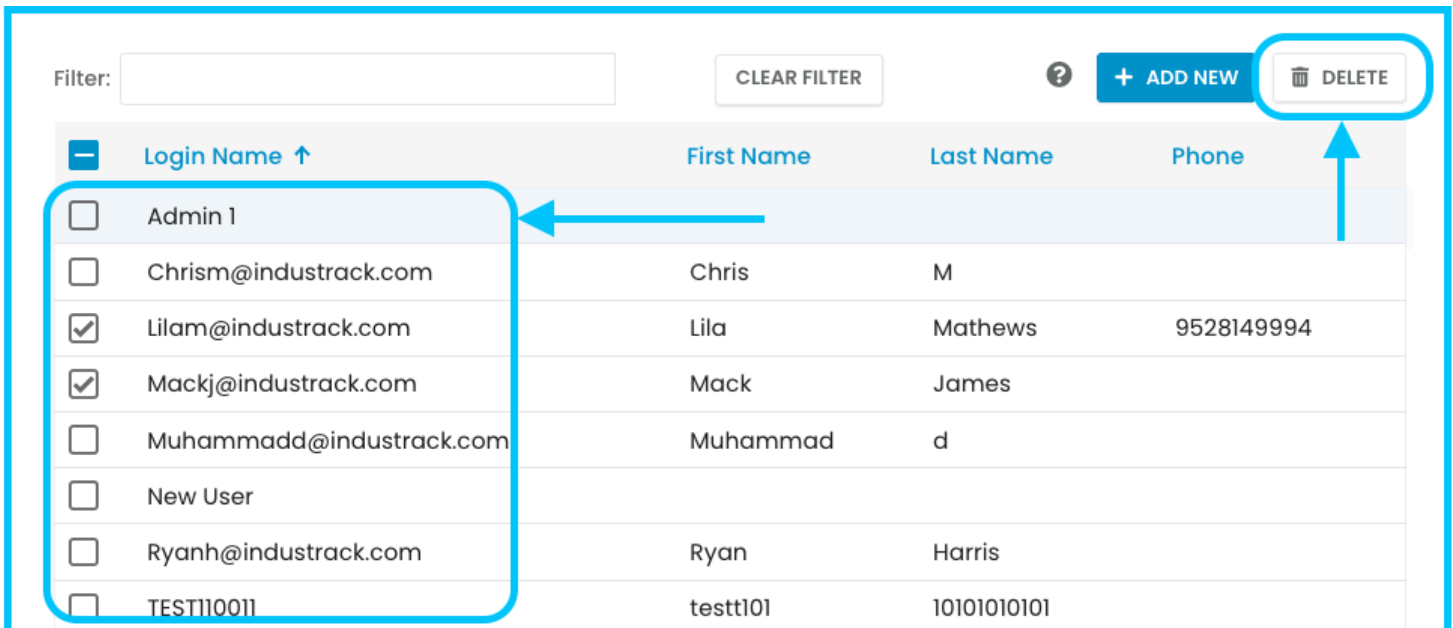


- Edit the necessary details.
- Click **Save**.

Deleting an Office User

1. Find the user in the list.
2. Tick the checkbox next to their name.
3. Click **Delete** (enabled after selecting a user).
4. Confirm deletion when prompted.

Important: Deleted users cannot be reactivated with the same email. If a user may return, consider **deactivating** them instead of deleting their account.



This guide simplifies managing office users while keeping all essential steps clear and easy to follow.

