



CUSTOMER USER ADMIN

MODULE #7

This document outlines the process of inviting new users to Lumbermen’s GO and assigning appropriate access permissions.

Contents

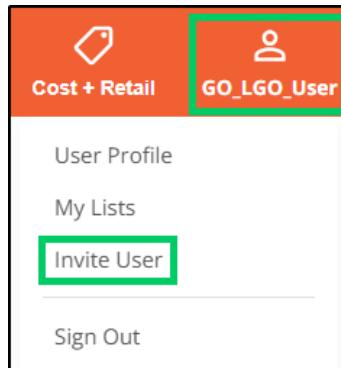
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Responsibilities

User Admins are responsible for ensuring that new users are invited with the correct access levels and permissions. Any issues or updates should be communicated to your Lumbermen's sales representative.

Accessing the Invite User Feature

- 1) Ensure that you have User Admin privileges. If you do not, contact your Lumbermen's representative to request access.
- 2) Click on your username in the top right corner of the screen.
- 3) Select "Invite User" from the dropdown menu.



Entering User Information

- 1) Fill in the required details:
 - a. Full Name: Enter the new user's full name.
 - b. Email: Provide the email address for the new user.
 - c. User ID: Create a unique User ID that they will use to log in.

Invite User

Full Name Required	User Email Required
Larry Lumbermen 15	larry@email.com
Restricted Characters: # ! @ \ ^ ' + ; , : * ~ {	
User ID Required	
larrygo 5	
Restricted Characters: # ! @ \ ^ ' + ; , : * ~ {	

Assigning Access Permissions

- 2) Select the appropriate site access level for the user.

Site Access

<input checked="" type="checkbox"/> Inventory	<input checked="" type="checkbox"/> Sales Orders
<input checked="" type="checkbox"/> Shopping Cart	<input checked="" type="checkbox"/> Invoices
<input checked="" type="checkbox"/> Billing	<input checked="" type="checkbox"/> Credit Memos
<input checked="" type="checkbox"/> Quotes	

- 3) Assign Branch and Ship-To Access:
 - a. Choose the branches and ship-to locations the user can access.
 - i. **Branch** = Lumbermen’s division that you are ordering materials from. The materials displayed on Lumbermen’s GO will differ based on which branch is selected
 - ii. **Ship-To** = Customer’s location placing the order
 - b. Set the default branch and ship-to location by selecting the corresponding radio buttons.

The screenshot displays two configuration sections: 'Branch Access and Sign In Default' and 'Customer Access and Sign In Default'. Each section is divided into 'Denied' and 'Granted' areas. In the 'Branch Access' section, 'SP Grand Rapids' is listed under 'Available Branches' with a green '+' icon next to it. Under 'Granted', 'BM Grand Rapids' is selected with a radio button. In the 'Customer Access' section, the 'Available Ship-to's' area is empty. Under 'Granted', a dropdown menu is open showing 'LUMBERMEN'S GO TEST' with an upward arrow. Below it, 'LGO SHIPTO #1' is unselected, and 'LGO SHIPTO #2' is selected with a radio button. A green box highlights the radio button for 'LGO SHIPTO #1'. At the bottom right, there are 'Clear Form' and 'Invite User' buttons.

Sending the Invitation

- 1) Once all details are confirmed, click “Invite User”.
- 2) The user will receive an automated email containing:
 - a. A link to the site
 - b. Their User ID
 - c. A temporary password to log in for the first time
- 3) Ensure new users successfully log in and update their passwords upon first access.

Post-Invitation Modifications

- 1) If any changes are needed after inviting the user, contact your Lumbermen's sales representative for assistance.