

Compeat Help

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Create a User

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With Users, you can define and manager records for users who access Compeat. This includes specifying which entities a user can access, and the security groups to which they belong.

Group Security membership determines which features a user can access.

You can access Users by navigating to **Users & Groups > Users**.

Users

EXPORT TO EXCEL

Search Hide Inactive

<input type="checkbox"/>	User Name	Full Name	Description	Inactive	
<input type="checkbox"/>	amy.gerber		General Manager		⌵
<input type="checkbox"/>	chase.carlton		Bar Director		⌵
<input type="checkbox"/>	jason.hollis		Compeat Support		⌵
<input type="checkbox"/>	matt.williams		Accounting Manager		⌵
<input type="checkbox"/>	michelle.ray		Operations Manager		⌵
<input type="checkbox"/>	sean.mcclure		Finance and Development	Inactive	⌵
<input type="checkbox"/>	stephen.brockman		Compeat Support	Inactive	⌵

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CREATE NEW USER

DELETE SELECTED USERS

! Security Password

Compeat considers Users an administrative-level feature, and therefore keeps user setup behind a security password. The primary contacts at your organization maintain this password.

View User Records

Existing users display in a listing. You can scroll through the listing, or use the paginators at the bottom to navigate between pages.

As with all grids, listings, and tables, you have several options when **viewing your data**.

- » **Ready to create a new user?** Select *Create New User* to launch the New User wizard.
- » **Wish to view or edit an existing user?** Click the User Name or select the arrow icon to the far-right of the user to access the user record.
- » **Wish to make a user inactive?** Access the user record and deselect the *Active* checkbox at the top of the record.

Why can't I delete a user?

Once a user has activity attached to their name (creating an invoice, posting a count, voiding a transaction, etc.), they cannot be deleted. Instead, you can mark them inactive. If you wish to hide inactive users in the user list, select the **Hide Inactive** checkbox at the top of the listing.

Create a New User

Compeat walks you through creating a new user record. You can create the username, set a password, and assign entity and group membership.

Username and Password

Each user requires basic information, such as a username and a password, in order to access Compeat. Their username functions as their personal identifier throughout the system.

New User

Username

Full name

Description

Enter email

Password

Confirm Password

User must change password on next login.

Email username/password to user.

- » **User names must be unique.** As best practice, we recommend using naming conventions that incorporate users' first and last name, such as *First Initial + Last Name* (i.e., jdoe) or *First Name.Last Name* (i.e., jane.doe). Usernames are not case-sensitive.
- » **Compeat has password requirements.** Passwords must be a minimum 6 characters and contain an uppercase, lowercase, and numerical value.

- » **Want your users to set their own password once they log in?** Select the corresponding checkbox and the user will be prompted to re-set their password.
- » **Want Compeat to send the user their login credentials?** Select the corresponding checkbox and we'll email the user their username and password at the email address you provided.

Entity Access

Entity Access allows you to select which entities the user can access. You can use the *Search* field to locate a desired entity, or scroll through the listing.

Entity Access

Choose which entities norah.winslow will have access to.

<input type="checkbox"/>	Entity	Default
<input checked="" type="checkbox"/>	102 - Dallas	
<input type="checkbox"/>	103 - Fort Worth	
<input type="checkbox"/>	104 - Arlington	
<input type="checkbox"/>	105 - El Paso	
<input type="checkbox"/>	106 - Austin	
<input type="checkbox"/>	109 - Marfa	
<input type="checkbox"/>	999 - Management Co.	

Add this user to all new entities created in the future

- » **Ready to assign entity access?** Simply select the checkbox beside each entity you wish to grant user access.
- » **Want to quickly assign a user to all entities?** Select the top-most checkbox in the blue header.
- » **Want to grant automatic access to entities created in the future?** Select *Add this user to all new entities created in the future*. This setting is ideal for your above-store users who

perhaps perform functions in all entities, such as processing posting invoices and processing payments.

Group Membership

Group Membership allows you to select which security group(s) the user belongs. Security groups dictate which screens and features your user can access.

Group Membership

Choose which group(s) norah.winslow will be a member of.

<input type="checkbox"/>	Group	Description
<input type="checkbox"/>	Administrators	System Administrators
<input checked="" type="checkbox"/>	Bar Managers	Bar Managers
<input type="checkbox"/>	Catering	Catering Leads
<input type="checkbox"/>	Directors	Directors
<input type="checkbox"/>	General Managers	General Managers
<input type="checkbox"/>	Home Office	Home Office
<input type="checkbox"/>	Workforce Manager	Workforce Manager

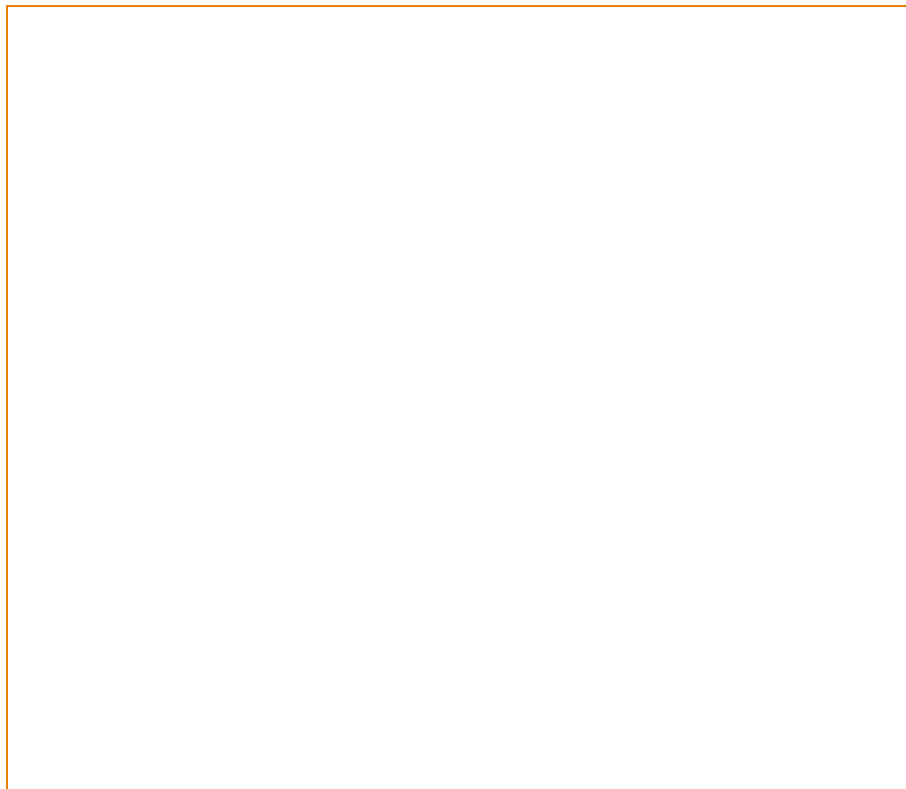
- » **Ready to assign group membership?** Simply select the checkbox beside the group(s) you wish to assign the user.
- » **Can I assign a user to more than one security group?** Users who belong to more than one security group have cumulative feature access. That is, a user has access to any feature or function granted by any of his/her assigned security groups.

i Security Group Members

You can also add or remove a user from a security group on the Members tab of the [security group record](#).

Review User

Before you finalize your new user, confirm the user information, entity access, and security group assignments.



If you need to make edits, you can do so by selecting **Edit** to the far-right of the section. Once you have confirmed user details, select **Finish** to create the user record. You are directed back to the main user listing where you can create additional user records, if desired.

Updated on March 9, 2021

