

# Users

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## Adding a New User

First, go to setup, and then in the top right click 'user'. Click 'add user' and then fill out the respective information and click save:

The screenshot shows the top navigation bar with tabs for Customers, Invoices, Payments, RMR, Work Orders, Proposals, Calendar, GL, Reports, Setup, and Accounting. Below this is the 'User Manager' section. A red circle labeled '1.' highlights the '+ Add User' button in the top right corner. Below the button are two checkboxes: 'Show Customer Users' and 'Show Inactive Users'. A table lists the current users:

User Name	First Name	Last Name	Email	Online	User Role
Alex	Alex	Cotes	alex@aa11aa.com	False	Manager

The screenshot shows the 'New User' form. A red circle labeled '2.' highlights the 'New User' title. The form is divided into two columns. The left column contains fields for: Username, First Name, Middle Initial, Last Name, Phone (with an 'ext.' field), Email, Time Zone (set to '(UTC-05:00) Eastern Time (US & Canada)'), User Role (set to 'Please Select...'), Products (with 'AlarmBiller' checked), Password, and Confirm. The right column contains: Default Login (set to 'Select Product:'), Site Theme (set to 'Black'), User Online (checkbox), Inactive (checkbox), Inactive Date, and Description. A red circle labeled '3.' highlights the 'Save' button in the top right corner. A 'Cancel' button is also visible next to it.

## User Role

This field determines what this user can see and do within AlarmBiller. You can select what you want this user to be able to view and edit by choosing one of our preset roles ("Administrator", "Manager", "User", "Technician", or "Salesperson") or you can choose "Custom" to select exactly what you want to allow the user to access yourself. Scroll down to "User Security Permissions" to view and customize what the user has access to. If you add or remove permissions from any of our default user roles, it becomes a Custom role:

The screenshot shows a single tab labeled 'Permissions' at the top of a section.

User Security Permissions:

**Accounts Payables**

- Add
- Delete
- Edit
- Read

**Miscellaneous**

- Company Setup** Access to all company setup information.
- Deliver** Ability to Deliver Individual Invoices and Credits. (Mark All as printed)
- Deliver All** Ability to Deliver all Invoices and Credits. (Mark All as printed)
- Export** Ability to export data to excel using the 'Export to Excel' button on various grids.
- Financial** Ability to view Financial Information.
- Quick Books** Ability to export/reverse Quickbooks files.
- Supervisor** Ability to see all work orders, proposals, and calendar appointments.
- User Administration** Manage all users and user roles.

**Credits**

- Add
- Apply
- Delete
- Edit
- View

**Customer Manager**

- Add
- Delete
- Edit
- View

**Payments**

- Deposit**
- Add**
- Apply**
- Delete**
- Edit**
- Payment Method Add** Add CC/eChecks.
- Payment Method Delete** Delete CC/eChecks.
- Payment Method Edit** Edit CC/eChecks.
- Refund**
- Submit** Submit individual CC/eCheck transactions.
- Submit All** Submit all CC/eCheck transactions.
- Unapply**
- View**

**Documents**

- Add
- Delete
- Download

- View Reports**
- Financials
- Generals
- Pivots

**General Ledgers**

- General Ledger**

**Inventory**

- Inventory** Manage Invoice Items and Parts under Setup.
- Quick Add** Add items and parts on the fly. (Proposals, Work Orders, Invoices, Credits)

**Invoices**

- Add
- Delete
- Edit
- View

**Proposals**

- Add
- Delete
- Edit
- View

**Recurring Work Orders**

- Delete
- Edit
- Generation
- View

**RMR**

- Add
- Delete
- Edit
- Invoice Generation**
- Rate Change** Ability to use rate change utility.
- View

**Sites**

- Add
- Delete
- Edit
- View

**Statements**

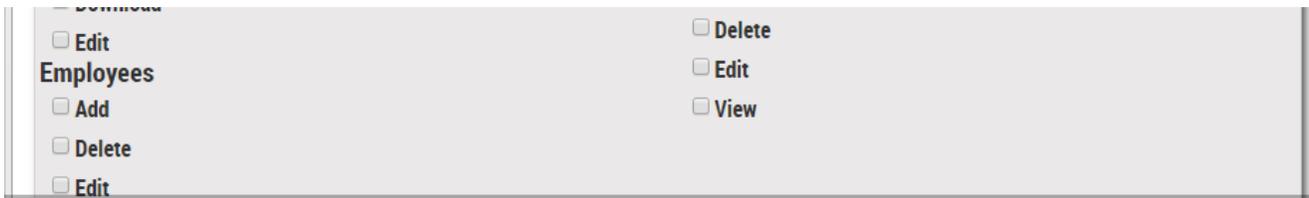
- Statements**

**Systems**

- Add
- Delete
- Edit
- View

**Work Orders**

- Add



**Administrator** has the rights to view and edit everything specified under “User Security Permissions”.

**Manager** has the rights to everything but the “Set Up” page.

**Technician** can view their own calendar and can also create, edit, and update their work orders.

**Salesperson** can create new customers, create proposals, and also view their own calendar. By default, they can only view their own proposals.

## Password

Choose a password for this User’s AlarmBiller account. Click on the question mark next to the password field to see the security requirements that must be met.

Note: this is a temporary password. All users will reset their passwords upon their first login.

## Default Login

This field is for a feature to be used in a future enhancement.

## Site Theme

This adjusts the background color theme this user will see when using AlarmBiller. We recommend selecting “Default” for our regular template design.

## Inactive

To make the user inactive, select the “Inactive” checkbox.

## Saving a User

To save click the “Save” box in the top right corner of the page.