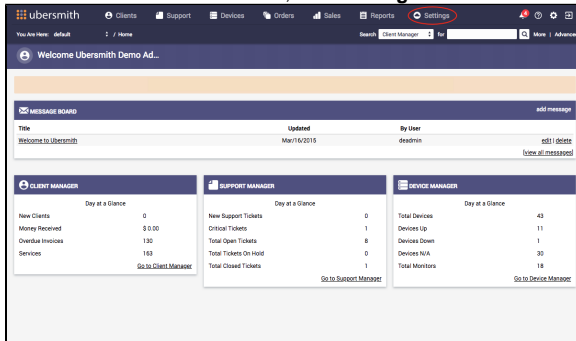


Adding User Roles

User roles allow you to manage user authorization, to specify the areas users are allowed to access. You can assign user roles to groups of users as a unit, such as billing, sales, support, and so on.

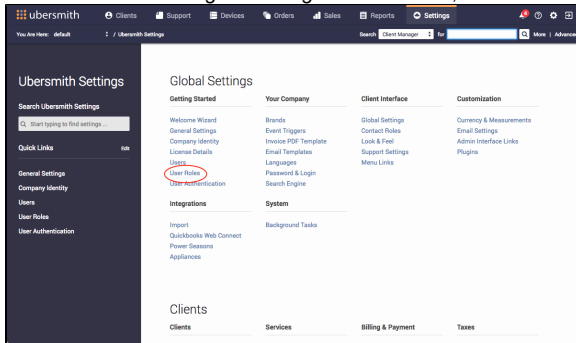
Access the User Roles Page

1. From the *Ubersmith Dashboard*, click **Settings**.



The *Ubersmith Settings* page appears.

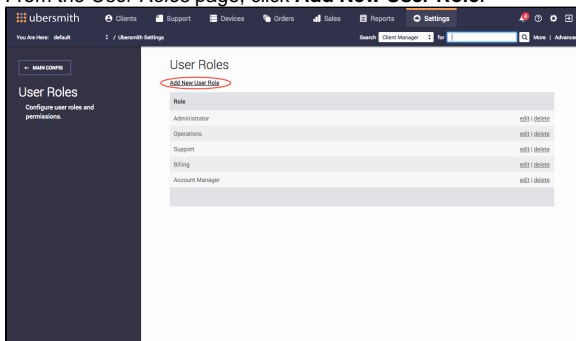
2. From the *Global Settings – Getting Started* section, click **User Roles**.



The *User Roles* page appears.

Complete the New User Roles Page

- From the *User Roles* page, click **Add New User Role**.



The *User Role* page appears.

Complete the Name Tab

1. In the **Role Name** field, enter the name of the role you want to create.

On this page:

On this page:

- [Access the User Roles Page](#)
- [Complete the New User Roles Page](#)
- [Complete the Name Tab](#)
- [Complete the Permissions Tab](#)
- [Related Topics](#)

2. In the **Description** field, enter a description of what the role properties will be.

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User Role

Home Permissions

Role Name: Account Manager

Description: The account manager ensures all services are working accordingly, facilitates new service requests with Sales, and tracks rights for each client.

Save Cancel

Complete the Permissions Tab

The *Permissions* grid contains each distinct area in Ubersmith, such as the *Client Manager* that can be expanded to display each area's functions, such as *Services*. Permissions available for each area are view, create, update and delete. None and Inherit are system defaults that start the user with no rights.

1. Click the *Permissions* tab. The *Permissions* grid appears.
2. Expand each area in the *Resources* column to access each area's functions.
3. Select the appropriate rights to assign to the role, for each area's *View*, *Create*, *Update* and *Delete* columns. **Allow** gives the user access and **Deny** gives the user no access.
4. Click **Save**.

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User Role

Home **Permissions**

Filter resources (i) shows inherited values

Resources	View	Create	Update	Delete
Address Portal	Allow	Allow	Allow	Allow
Client Manager	Allow	Allow	Allow	Allow
Client Profile	Allow	Allow	Allow	Allow
Services	Allow	Allow	Allow	Allow
Account Credits	Allow	Allow	Allow	Allow
Billing/Invoicing	Allow	Deny	Deny	Allow
Invoices	Allow	Deny	Deny	Allow
Master Service Agreement	Allow	Deny	Deny	Allow
Payment Methods	Allow	Deny	Deny	Allow
Tax Exemptions	Allow	Deny	Deny	Allow
Billing Disputes	Allow	Deny	Deny	Allow

Save Cancel

Related Topics

[Adding Users](#)

[Managing Users](#)

[Managing User Roles](#)