Adding and managing users

TL;DR

> This page covers adding a user, giving them companies and a role, changing their details, and closing an account. There is no self-service password reset anywhere in Export ERP. An administrator sets a new password and tells the person directly, because the system never sends email.

What this is for

User accounts let your colleagues sign in. Each account carries a name, an email address, a password, exactly one role, and one or more companies.

The role decides what the person can do. The companies decide what they can see. See How access works.

Where to find it

User Management → Users in the top menu.

The list screen

The list shows every account, newest first, ten rows at a time. The selector under the list offers 25, 50, 100, 500 and All. A search box at the top filters the list as you type, settling about a second after you stop.

A filter button opens a "Role:" choice with **Apply** and **Reset**, narrowing the list to one role.

The columns:

- A tick box on each row, for selecting several accounts at once
- **User**: the person's name
- **Email**
- **Role**
- **Status**: reads Active or Deleted. Removed accounts stay in the list, marked Deleted.
- **Joined Date**: when the account was added
- The last column always holds a **View** icon. If you can make changes, **Edit** and **Delete** icons appear too, but never on Deleted rows, and never on the "Super Admin" account.

If you can make changes, a button above the list offers **Add new user**. Ticking any row reveals a red **Delete** button above the list for removing the selection.

Fields

Field	Rules	Notes
Full Name	Required. Up to 255 characters.	
Email	Required. A valid email address, up to 255 characters, not used by another current account.	An address that belonged to a removed account can be used again.
Password	Required when adding. At least 8 characters, with uppercase and lowercase letters, a number and a symbol.	When changing an account, the box is marked "(Leave blank to keep current password)". Leave it empty and the password stays.
Confirm Password	Must match Password.	
Associated Companies	Required. Pick at least one company.	More than one company is allowed.
Role	Required. Pick exactly one role.	The "Super Admin" role cannot be given to another account.

Errors you may see

What happened	What you see
You left the name empty	"Please enter full name."
You left the email empty	"Please enter email address."
The email is already on a current account	"The email address already exists."
You left the password empty when adding	"Please enter password."
The password is too short	"Please enter at least 8 characters."

What happened	What you see
The password is missing a required kind of character	"Use at least 8 characters, including uppercase and lowercase letters, numbers, and symbols."
You left the confirmation empty	"Please enter confirm password."
The two passwords differ	"Your password and confirm password must be same."
No company picked	"Please select at least one company."
No role picked	"Please select a role."
You tried to give someone the "Super Admin" role	"Cannot assign super admin role."
You tried to change the "Super Admin" account	"Super Admin accounts cannot be editable."
You tried to remove the "Super Admin" account	"Super Admin account cannot be deleted."
You tried to remove your own account	"You cannot delete your own account."

Adding a user

1. Open **User Management → Users**.
2. Select **Add new user**. The "Add User" page opens.
3. Fill in **Full Name**, **Email**, **Password**, **Confirm Password**, **Associated Companies** and **Role**.
4. Select **Save**.

You return to the list and see "User added successfully.". The person can sign in immediately.

Changing a user

1. In the list, select the **Edit** icon on the account's row. The "Edit User" page opens.
2. Change what you need. Leaving **Password** empty keeps the current password.
3. Select **Update**. You see "User updated successfully.".

Resetting a password

There is no reset link anywhere. The system never emails anyone. An administrator sets a new password instead:

1. Open the account's "Edit User" page.

2. Type the new password into **Password** and **Confirm Password**. The same rules apply as when adding.
3. Select **Update**.

Tell the person their new password yourself. They can change it afterwards under their name at the top right, via "Change Password". That screen asks for the current password first. If it is wrong, the change is refused with "Your current password is not correct!".

Removing a user

1. In the list, select the **Delete** icon on the account's row.
2. The dialog asks "Are you sure you want to delete this User?". Select **Yes, delete!**, or **No, return** to cancel.
3. You see "User deleted successfully.".

To remove several at once, tick their rows, select the red **Delete** button above the list, and confirm "Are you sure you want to delete the selected Users?". You see "Selected users deleted successfully.".

There is no way to switch an account off temporarily. Removal is the only option, and the row stays in the list marked Deleted.

What happens behind the scenes

- A removed account stays in the list, marked Deleted, and its details can still be opened. Only the sign-in stops working.
- Removing an account does not remove the person's work. Orders, invoices and paperwork they entered stay exactly as they were.
- The email address of a removed account is free for a new account straight away.
- Ticking the "Super Admin" account or your own account in a group removal quietly skips them. The rest of the selection is removed.

FAQs

Can I email someone a password reset link?

No. There is no reset link anywhere and the system never emails anyone. An administrator types a new password into the account's "Edit User" page and tells the person directly.

Can I switch an account off temporarily instead of deleting it?

No. There is no way to switch an account off temporarily; removal is the only option, and the removed row stays in the list marked Deleted.

If I remove a user, does their work disappear?

No. Orders, invoices and paperwork they entered stay exactly as they were. Only the sign-in stops working, and the account's details can still be opened from the list.

Can I reuse the email address of a removed account?

Yes. The email address of a removed account is free for a new account straight away. Only addresses on current accounts are refused.

Why do some rows have no Edit or Delete icons?

Edit and Delete icons never appear on Deleted rows or on the "Super Admin" account, and they only appear at all if you are allowed to make changes. Every row always keeps its View icon.

What happens if my group removal includes my own account or "Super Admin"?

Those accounts are quietly skipped and the rest of the selection is removed. You also cannot remove your own account on its own; the system refuses with "You cannot delete your own account.".

Related pages

- How access works: what roles and company assignments mean
- Creating and editing roles: the roles this screen assigns
- Permission reference: every permission and what it allows

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