

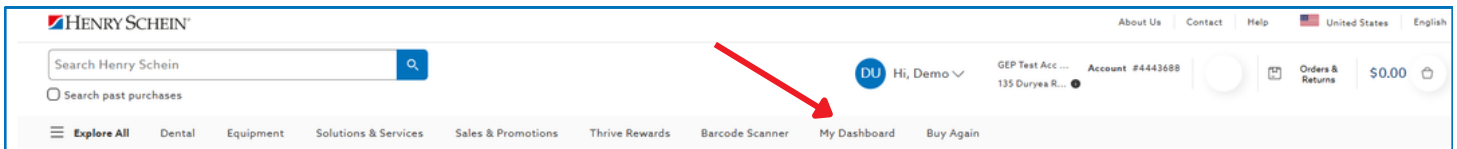
Managing Users

A quick guide on creating and managing users within your organization.

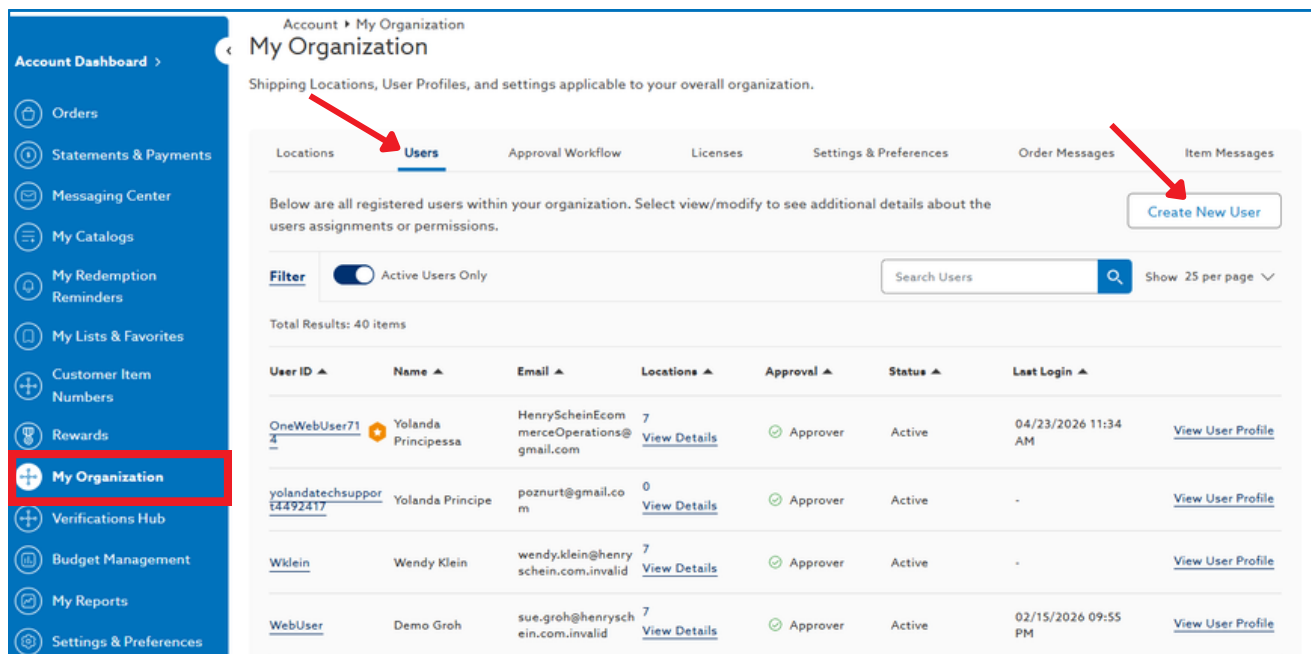
01

How to Create a New User

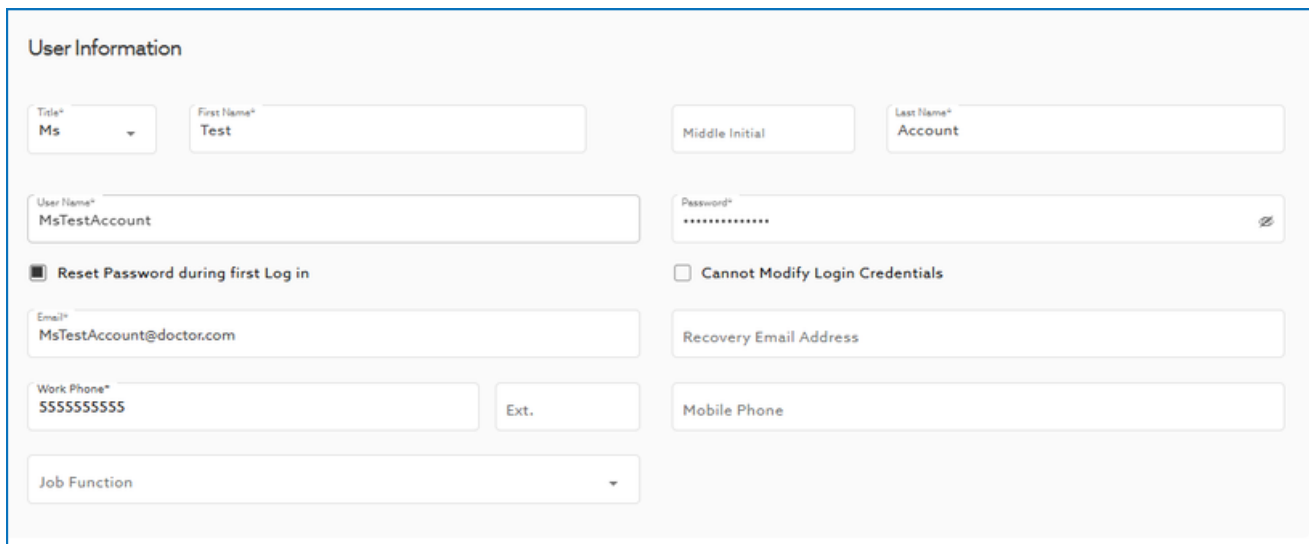
- In order to create a new user, you must be a User Admin.
- After logging in, click **My Dashboard**.



- Click **My Organization**.
- Click **Users** tab.
- Click **Create New User**.



- Complete all required information fields (indicated with an asterisk*). This includes: Title, Name, Email, Phone, User Name & Password.



User Information

Title* Ms First Name* Test Middle Initial Last Name* Account

User Name* MsTestAccount Password* *****

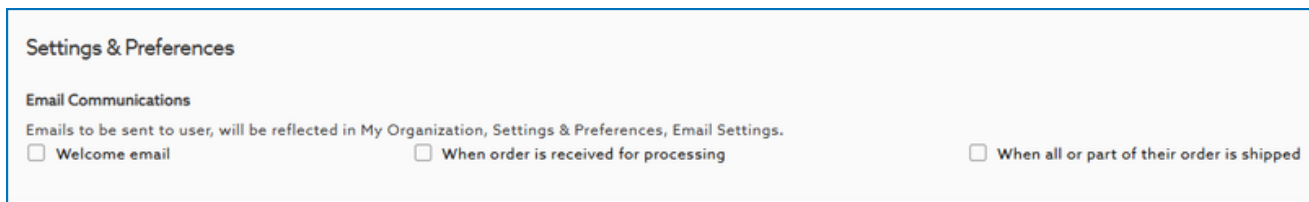
☒ Reset Password during first Log in ☐ Cannot Modify Login Credentials

Email* MsTestAccount@doctor.com Recovery Email Address

Work Phone* 5555555555 Ext. Mobile Phone

Job Function

- Scroll down to **Setting & Preferences**.
- Click the check box next to the desired settings.



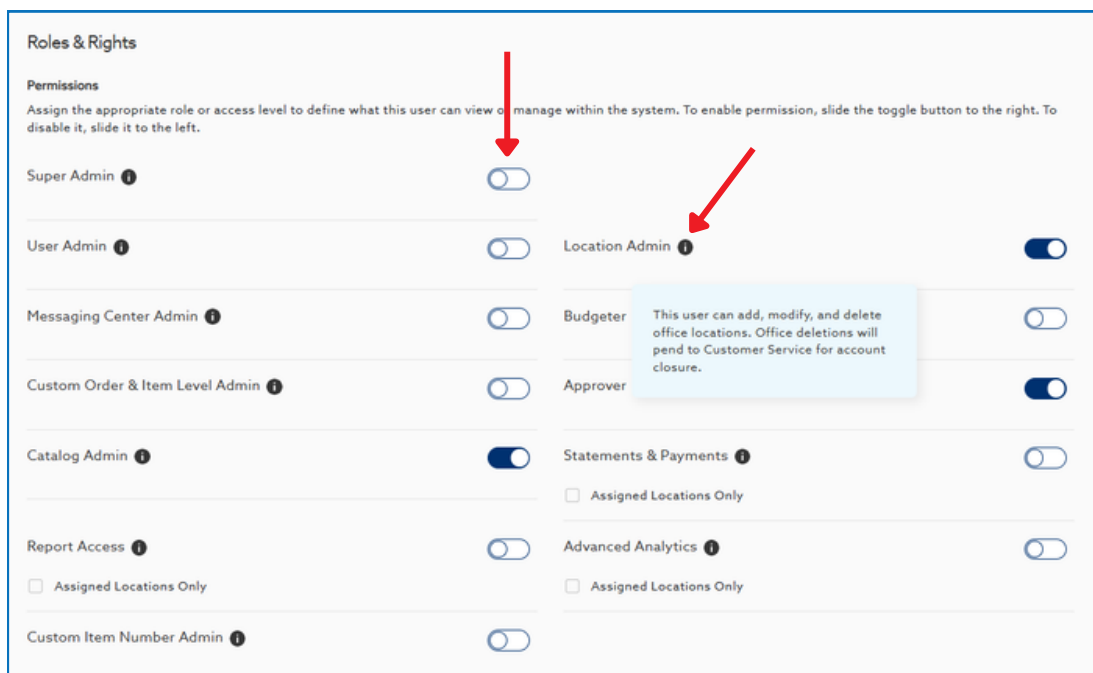
Settings & Preferences

Email Communications

Emails to be sent to user, will be reflected in My Organization, Settings & Preferences, Email Settings.

☐ Welcome email ☐ When order is received for processing ☐ When all or part of their order is shipped

- Scroll down to **Roles & Rights**.
- Click the **toggle switch** next to the desired role and access levels.
- Hover over the **information icon** for an explanation of each setting.
- Click **Next**.



Roles & Rights

Permissions

Assign the appropriate role or access level to define what this user can view or manage within the system. To enable permission, slide the toggle button to the right. To disable it, slide it to the left.

Super Admin ⓘ	☐		
User Admin ⓘ	☐	Location Admin ⓘ	☒
Messaging Center Admin ⓘ	☐	Budgeter ⓘ	☐
Custom Order & Item Level Admin ⓘ	☐	Approver ⓘ	☒
Catalog Admin ⓘ	☒	Statements & Payments ⓘ	☐
		☐ Assigned Locations Only	
Report Access ⓘ	☐	Advanced Analytics ⓘ	☐
☐ Assigned Locations Only		☐ Assigned Locations Only	
Custom Item Number Admin ⓘ	☐		

Information Icon: This user can add, modify, and delete office locations. Office deletions will pend to Customer Service for account closure.

- Select locations the user can access.
- At least one location must be selected.
- Click **Next**.

Assign Locations to Test (Minimum 1)

Please note that every user needs to have a location assigned to them.

Search locations  Show 25 per page 

Total Results: 7 items

☐ Locations Nickname(1)	 Practice Name 	 Address 	 Shipping 	 Billing 
☐ 135 Duryea Rd - 4443688	GEP Test Account- YP Account	135 Duryea Rd	4443688	4443688
☒ 135 Duryea Rd Suite 135	GEP Test Account OMS	135 Duryea Rd	4488869	4488868
☐ Bill to 4488868	Yolanda Principe - DSM	135 Duryea Rd	4519749	4488868

- Select catalogs the user can access.
- At least one catalog must be selected.
- Click **Finish**.

Assign Catalogs to Test (Minimum 1)

Please note that every user needs to have a catalog assigned to them.

Search 

Show 25 per page 

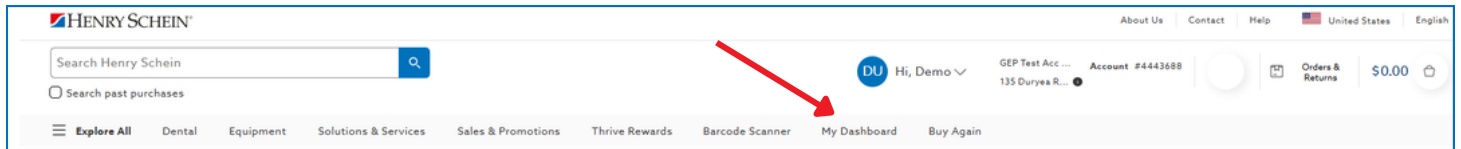
Total Results: 2 items (1 selected)

 Catalogs 	 Products 	☐ View Only	Set As Default
☒ Dental	90523	☐ View Only	☒ Set As Default
☐ Dental / Medical	273467	☐ View Only	☐ Set As Default

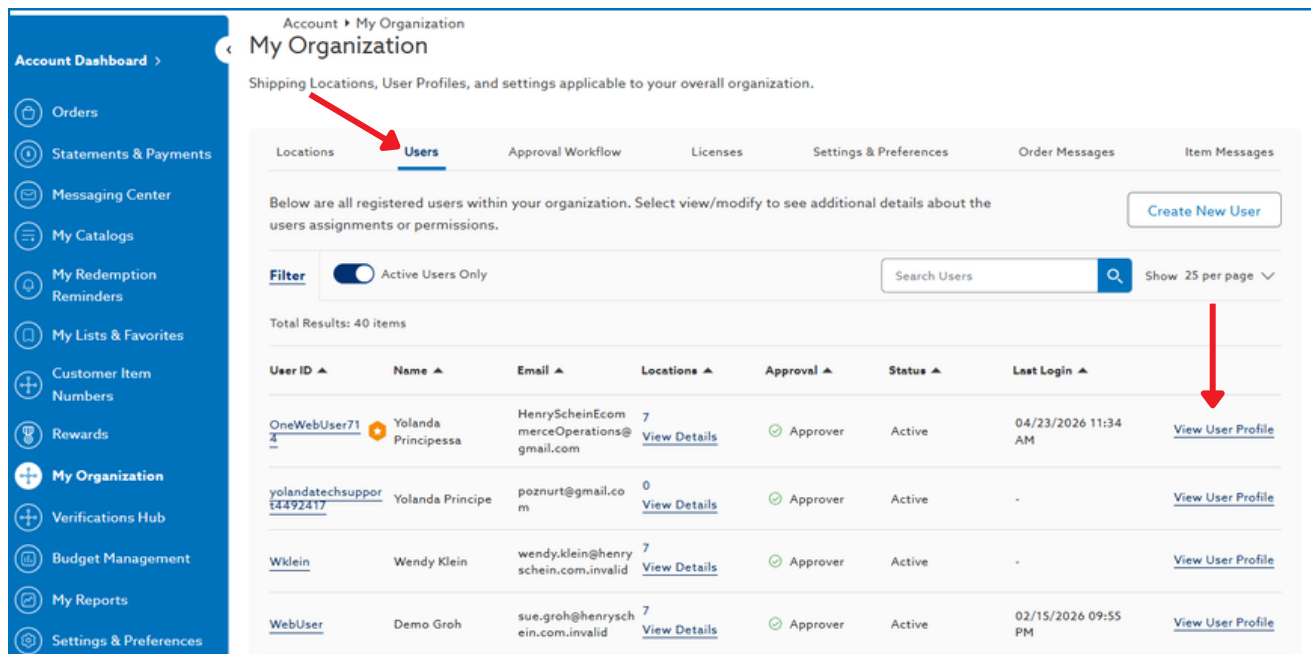
- A User Profile Created message will populate.

How to Edit & Manage Users

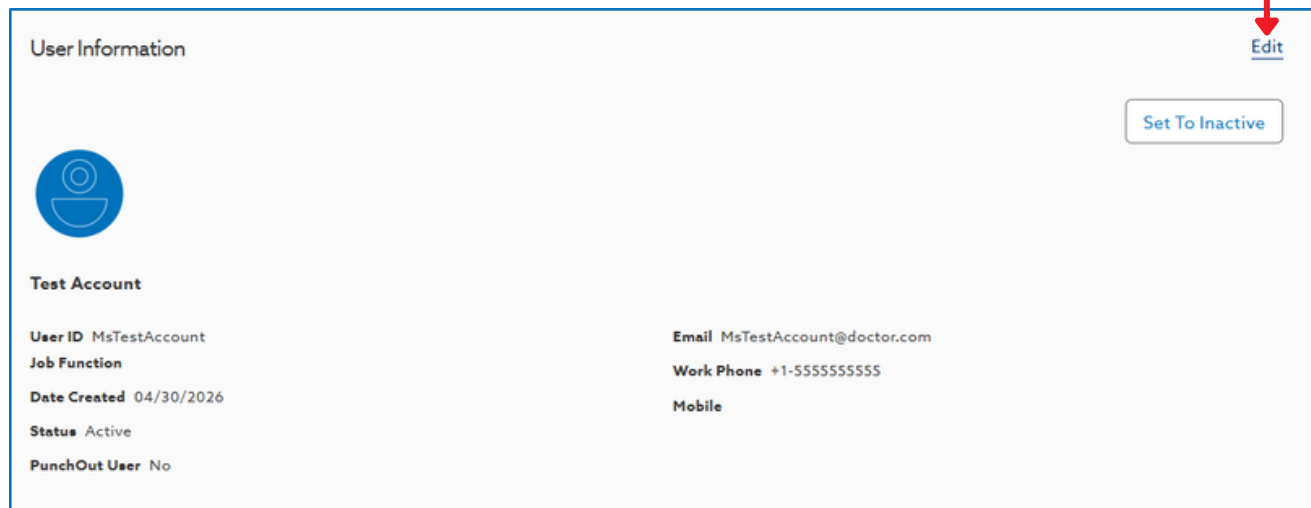
- Click **My Dashboard**.



- Click **My Organization**.
- Click **Users** tab.
- Find user's name, then click **View User Profile**.



- To edit User Information, click **Edit** in the User Information section.



- Make necessary changes.
- Click **Confirm**.

User Information



User ID*
MsTestAccount

Job Function
Other

Title*
Ms

First Name*
Test

Work Phone*
+1-5555555555

Extension

Last Name*
Account

Mobile

Email*
MsTestAccount@doctor.com

Recovery Email

Create a New Password

Note: Password must be 8-15 characters long and is case sensitive. It must include at least one uppercase letter, lowercase letter, and a number. The following special characters are allowed and optional: ! " \$ % ' () * + , - . : ; > ? [\] ^ _ { | } ~

Confirm New Password

Cancel Confirm

- To edit assigned location or catalogs, click **Edit and Assign**.

Location (1)

[Edit and Assign](#)

135 Duryea Rd
Account: #4488869
135 Duryea Rd Suite 135
Since 04/30/2026

Catalog (1)

[Edit and Assign](#)

Dental
Since 04/30/2026

- Select/remove desired locations or catalogs, click **Confirm** to save changes.

Locations

☐ View Assigned Locations Only

Search

Show 24 per page

Total Results: 7 items (1 selected)

Location name	Account Number	Address	Phone number	Last Order
☒ GEP Test Account OMS	#4488869	135 Duryea Rd	6314543060	N/A
☐ GEP Test Account- YP Account	#4443688	135 Duryea Rd Attention: Yolanda Principe	6318435632	04/21/2026

To User Profile

Locations:
GEP Test Account OMS

Confirm

- To edit Role & Rights click **Edit**.

Role & Rights

Edit

Permissions

Assigned permissions control what level of access this user profile will have.

- Toggle Permissions/Rescriptions on or off, then click **Confirm** to save changes.

Role & Rights

Permissions

Assigned permissions control what level of access this user profile will have.

Super Admin ⓘ

User Admin ⓘ

Location Admin ⓘ

Since 04/30/2026

Budgeter ⓘ

Report Access ⓘ

☒ Assigned Locations Only

Since DD-MM-YYYY

Messaging Center Admin ⓘ

Custom Order & Item Level Admin ⓘ

Custom Item Number Admin ⓘ

Approver ⓘ

Since 04/30/2026

Statements & Payments ⓘ

☐ Assigned Locations Only

Catalog Admin ⓘ

Since 04/30/2026

Restrictions

Assigned restrictions limit this user profiles capabilities while on the website.

Requires Approval ⓘ

☐ Only Required At/Above

\$

View Only ⓘ

Cannot Modify Login Credentials ⓘ

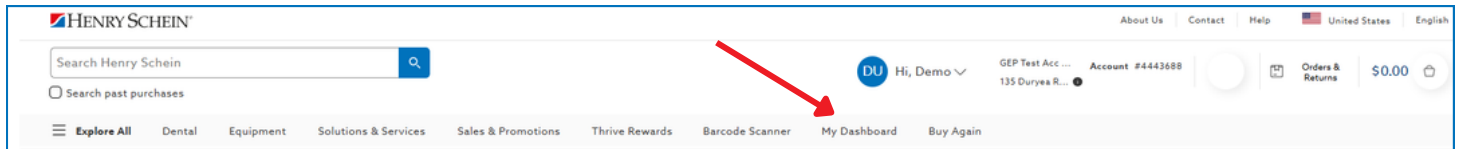
No View of Pricing ⓘ

Cancel

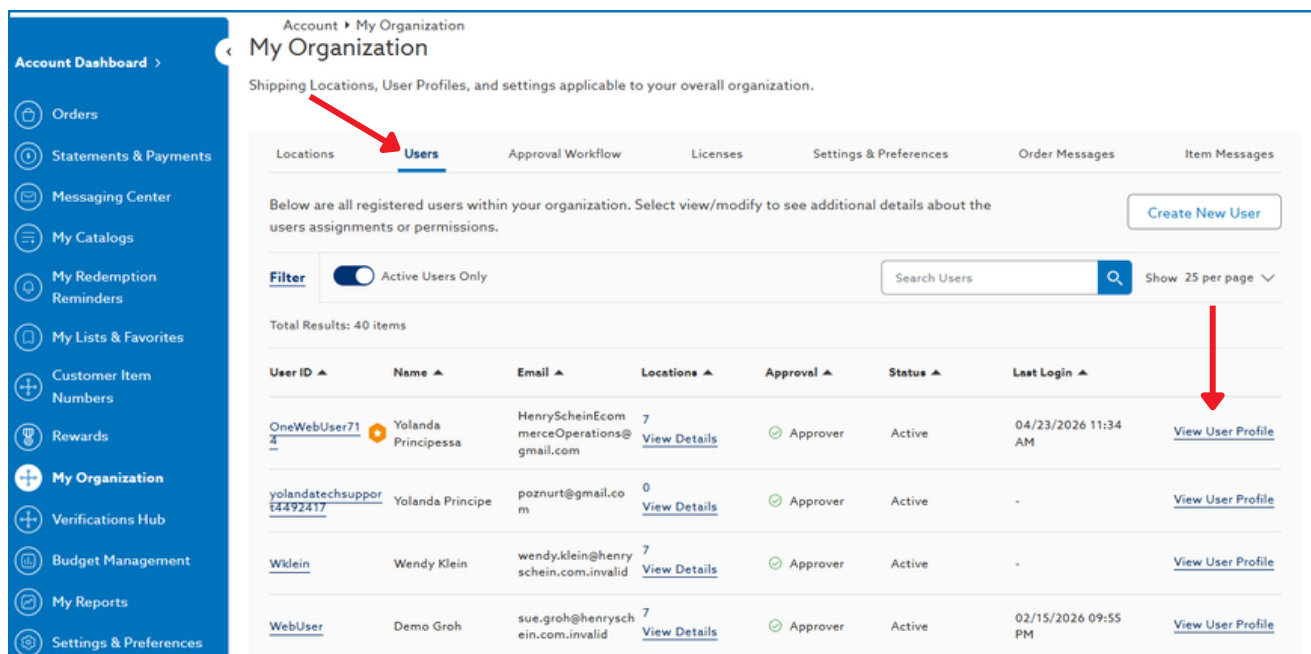
Confirm

How to Deactivate a User

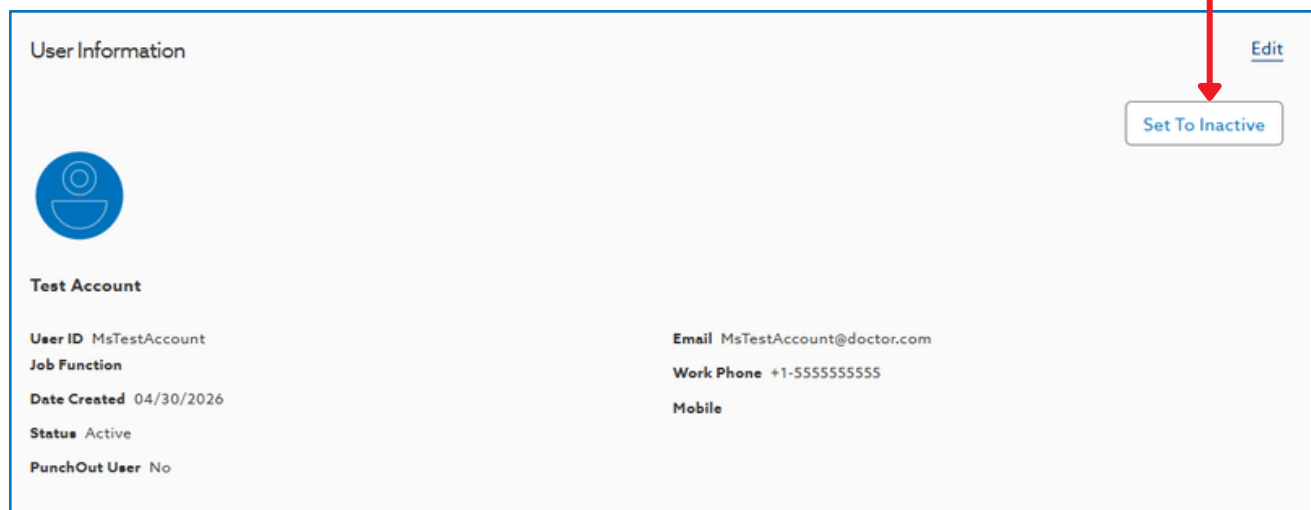
- Click **My Dashboard**.



- Click **My Organization**.
- Click **Users** tab.
- Find user's name, then click **View User Profile**.



- To edit User Information, click **Edit** in the User Information section.



- Once a user is deactivated they will no longer be able to log in or place orders.