Supplier Admin: Add a New Supplier User

This document provides a supplier admin user with the steps necessary to create a supplier user profile record. This guide is based on standard classic Beeline VMS configuration. Client-specific configurations may vary slightly from what is explained here.

To add a new staff user to your supplier organization:

1. Log in to Beeline using your *user name* and *password*. Your Home screen appears.
2. Click the Admin drop-down arrow located in the Header Menu bar and select **User Administration**. The User List Screen displays.
3. Click + Add New in the action bar. The Add User – Details screen displays.
4. Complete all the required fields as indicated by the asterisk (*). Some fields will auto-populate based on your supplier organization settings. Adjust if needed.
    - Enter an email address to which you want this user's system notifications sent.
    - Verify that the Culture setting is accurate since this will determine how dates display to the user (e.g., MM/DD/YY for en-US, DD/MM/YY for en-GB).
5. Complete other fields as needed.
    - Set the Time Zone to match the user's home base. The system will then automatically adjust time and date settings where users are located in different time zones.
    - Adjust the Currency default setting if the user needs to see financial data in a different currency.
    - Verify that the Active setting is check marked (default setting). Only active users can perform tasks within the system.
    - "Check" the Password Does Not Expire checkbox if your policy does not require that system users regularly update their passwords.
6. Be sure to assign both a Role and a User Type! (Users can be assigned more than one depending on their assigned tasks.) Use the selection lists to assign roles and click **Search** next to User Types to open the selection dialog box.

    User roles determine which actions a user can take within Beeline VMS in addition to their visibility to system data. User types determine which system-generated notifications (email, dashboard, mobile) they receive.

7. Click **OK**. The screen refreshes and asks you to confirm key fields on the user profile. Re-enter these fields to match your original settings.
8. Click **OK**. An alert message will display if there are any errors that need to be corrected. Make the adjustments and click **OK** again. If there are no errors, the message will state that your changes have been applied. An email is sent to the new user with login instructions.