**User Creation & Access Rights in moonstride**

*Managing your team’s system access is simple with moonstride. Create user groups to control permissions, then add users for fast, secure access to the right modules and data.*

**Table of Contents**

1. Introduction
2. Creating User Groups
   * Step-by-Step: Create a User Group
   * Example User Groups
3. Creating Users
   * Step-by-Step: Add a New User
   * User Screen Actions & Access Controls
   * Example Users & Groups
4. Help & Next Steps
5. See Also

**1. Introduction**

moonstride allows you to organise every system user into groups, each with custom access rights and privileges. A well-structured user management setup makes it easy to grant or restrict access to sensitive data and ensures that every team member sees only what’s relevant to their role.

**2. Creating User Groups**

Grouping users by department or function (e.g. Sales, Accounts, IT) makes system management much easier, and lets you assign shared permissions for quicker updates.

**Step-by-Step: Create a User Group**

1. Navigate to **Administrator > User Management > User Group** from the top menu.
2. Click **Add** to create a new user group.
3. On the "Add User Group" screen fill in:
   * **Code:** Short unique code for the group (e.g. IT, MKT, FIN)
   * **Name:** Name of the group (e.g. IT Super Admin, Marketing Team)
   * **Description:** (Optional) Add a note for internal reference. *Insert screenshot here of the User Group creation screen*
4. Click **Save**.

To manage existing groups, use the **Actions** column:

* **Edit:** Update group name or description
* **Delete:** Remove a group you no longer need

**Example User Groups**

* **IT Super Admin**
* **Guest User**
* **Marketing Team**
* **Finance & Accounting Team**

*Tip: Assign users to appropriate groups to streamline your access management.*

**3. Creating Users**

After your groups are set up, you can add system users and place them in groups for correct permissions and visibility.

**Step-by-Step: Add a New User**

1. Go to **Administrator > User Management > Users**.
2. Click the **Add** button (top right) to create a new user.
3. Fill in the required fields:
   * **User Group:** Select the relevant group for permissions.
   * **First Name** and **Last Name**
   * **Email:** The user’s login and contact email
   * **User Name:** System login username
   * **Status:** Mark as active or inactive
   * **Primary User:** Indicate if this is a main/lead user
   * **Profile Type:** Choose the role or profile (e.g. staff, manager)
   * **Time Zone & Tracking Code** *Insert screenshot here of the User creation/edit screen*
4. **Set Sell Channel Visibility** Choose which sales channels, areas, and modules each user can access (see screenshot for visual guide):
   * Tick boxes to allow visibility or actions for enquiries, quotes, bookings, customers, etc., as well as for specific offices or locations. *Insert screenshot here highlighting Sell Channel Visibility grid*
5. **Add User Signature** (optional)
   * Use the signature editor to set a personalised sign-off for the user’s communication. *Insert screenshot here of the Signature section*
6. Tick **Notify to User** if you wish to send a setup email to the user.
7. Click **Save** when finished.

*Note: To update user group assignments or major access rights, please contact the moonstride support team. We’ll ensure your settings are accurate and secure.*

**User Screen Actions & Access Controls**

From the **User** screen you can:

* **Edit:** Update user information, permissions, or email.
* **Delete:** Remove a user account.
* **Change Password:** Reset the user’s password.
* **Set User Access:** Detailed access assignment for modules/features.
* **Set User IP Address:** Restrict account access to specific locations/IPs.
* **Status:** Toggle between Active and Inactive (confirmation required).
* **Filter/Search:** Use the search bar and filters (User Group, Profile Type, Status) to find users quickly.

**Example Users & Groups**

* **IT Super Admin (Group)**
  + Users: Super Admin
* **Guest User (Group)**
  + Users: guest user name 1, guest user name 2, guest user name 3

*Insert screenshot here showing a typical user list with grouped and individual users.*

**4. Help & Next Steps**

**Access rights management is crucial for data protection and business efficiency.** If you need to add users to a group or update advanced access privileges, please contact the moonstride team—our support specialists are here to help configure your platform securely for your organisation.

**5. See Also**

* [How to Change a User’s Password](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Setting Up Teams and Departments](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [User Permissions Best Practices](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Security & Access Control Checklist](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)