




User Role Management in Magento2

User Roles

To give someone restricted access to the [Admin](#), the first step is to create a role that has the appropriate level of permissions. After the role is saved, you can add new users and assign the restricted role to grant them limited access to the Admin.

Roles

 admin ▾

Add New Role

Search

Reset Filter

2 records found

20 ▾ per page

<

1 of 1

>

ID	Role	Allowed Scopes
2	Administrators	All
5	Catalog Mgmt	All

Roles

☐ [To set up a role:](#)

1. On the Admin sidebar, tap **System**. Then under **Permissions**, choose **User Roles**.
2. In the upper-right corner, tap Add New Role. Then, do the following:

☐ [Step 1: Define the Role](#)

1. Under **Role Information**, enter a descriptive **Role Name**.
2. Under **Current User Identity Verification**, enter **Your Password**.

New Role

← Back Reset **Save Role**

ROLE INFORMATION

Role Information

Role Info

Role Resources

Current User Identity Verification

Role Name *

Your Password *

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Role Name

☐ **Step 2: Assign Resources**

Important! When assigning resources, be sure to disable access to the Permissions tool if you are limiting access for a given role. Otherwise, users will be able to modify their own permissions.

1. Set Role Scopes to one of the following:

- All
- Custom

If set to “Custom” for a multisite installation, mark the checkbox of the website and store where the role is to be used.

Role Scopes

Role Scopes

Custom ▼

☐ Main Website

☐ Main Website Store

Custom Role Scope

2. Under **Roles Resources**, set **Resource Access** to “Custom.”

3. In the tree, mark the checkbox of each Admin **Resource** that the role can access.

To create an Admin role with access to tax settings, choose both the Sales/Tax and System/Tax resources. If setting up a website for a region that differs from your default [shipping point of origin](#), you must also allow access to the System/Shipping resources for the role. The shipping settings determine the store tax rate that is used for catalog prices.

Roles Resources

Resource Access

Custom ▼

Resources

- ▲ ☐ Dashboard
- ▶ ☐ Sales
- ▲ ☒ Products
 - ▲ ☒ Category Permissions
 - ▲ ☒ Inventory
 - ▲ ☒ Catalog
 - ▲ ☒ Edit Product Status
 - ▲ ☒ Read Product Price
 - ▲ ☒ Edit Product Price
 - ▲ ☒ Categories
 - ▶ ☐ Carts
 - ▶ ☐ Customers
 - ▶ ☐ Marketing
 - ▶ ☐ My Account
 - ▶ ☐ Content
 - ▶ ☐ Reports
 - ▶ ☐ Stores
 - ▶ ☐ System
 - ▲ ☐ Global Search

Role Resources Assigned

The list of available permissions may include additional options for Magento developed, Core Bundled, and installed extensions. By selecting the top-most permission for each feature, you assign all permissions available for the user.

4. When complete, tap Save Role.

The role now appears in the grid, and can be assigned to new user accounts.

☐ [To edit user role assignments:](#)

1. From the **Roles** grid, open the record in edit mode.
2. Under **Current User Identity Verification**, enter **Your Password**.

The screenshot displays the 'Catalog Mgmt' page in the Magento admin interface. The left sidebar lists various management areas. The main content area is titled 'Role Information' and contains two sections: 'Role Info' and 'Current User Identity Verification'. In the 'Role Info' section, the 'Role Name' is set to 'Catalog Mgmt'. In the 'Current User Identity Verification' section, there is a 'Your Password' field. At the top right, there are navigation buttons: 'Back', 'Delete Role', 'Reset', and a prominent orange 'Save Role' button. The footer shows the Magento version as 2.1.0-rc2 and includes a 'Report Bugs' link.

Editing a Role

3. In the panel on the left, choose **Role Users**.

The Role Users option appears only after a new role is saved.

4. To search for a specific user record, do the following:

a. Enter the value in the search filter at the top of a column. Then, press **Enter**.

b. When you are ready to return to the full list, click **Reset Filter**.

5. Mark the checkbox of any user(s) to be assigned to the role.

6. Tap Save Role.

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

FIND PARTNERS & EXTENSIONS

Catalog Mgmt

Q

1

magento

← Back

Delete Role

Reset

Save Role

ROLE INFORMATION

Role Info

Role Resources

Role Users

Role Users

Search

Reset Filter

5 records found

20 per page

<

1 of 1


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	User ID	User Name	First Name	Last Name	Email	Status
Any						
<input type="checkbox"/>	1	Jane	Jane	Smith	janesmith@example.com	Active
<input type="checkbox"/>	2	John	John	Doe	johndoe@example.com	Active
<input checked="" type="checkbox"/>	3	Madge	Madge	Ento	merchdocs@example.com	Active

Role Users

Customer Groups

Customer groups determine which discounts are available, and the tax class that is associated with the group. The default customer groups are General, Not Logged In, and Wholesale.



DASHBOARD

SALES

CATALOG

CUSTOMERS

MARKETING

CONTENT




REPORTS

STORES

SYSTEM

FIND PARTNERS & EXTENSIONS

Customer Groups




admin ▾

Add New Customer Group

Filters

Default View ▾

Columns ▾

8 records found

20 ▾

per page


<

1

of 1

>

ID	Group	Tax Class	Action
0	NOT LOGGED IN	Retail Customer	Edit
1	General	Retail Customer	Select ▾
2	Wholesale	Retail Customer	Select ▾
3	Retailer	Retail Customer	Select ▾
5	Group 5	Europe Customer	Select ▾
6	Group 6	Retail Customer	Select ▾
7	Group 7	Europe Customer	Select ▾
8	Group 8	Retail Customer	Select ▾



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Magento ver. 2.2.0-dev

[Report an Issue](#)

Customer Groups

☐ [To filter customer groups:](#)

1. On the Admin sidebar, tap **Customers**. Then choose **Customer Groups**.
2. Tap **Filters**.
3. Enter criteria for searching groups, including a range of IDs, group, or tax class.

The screenshot shows the 'Customer Groups' page in the Magento Admin interface. The left sidebar contains navigation links: DASHBOARD, SALES, CATALOG, CUSTOMERS (highlighted), MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area has a header 'Customer Groups' with a search icon, a notification bell, and a user profile 'admin'. A red button 'Add New Customer Group' is in the top right. Below the header, there are filter sections for 'ID' (with 'from' and 'to' input fields), 'Group' (with an input field), and 'Tax Class' (with a dropdown menu showing 'Retail Customer'). To the right of these filters is a 'Filters' button and a 'Default View' dropdown menu. At the bottom right of the filter section are 'Cancel' and 'Apply Filters' buttons. Below the filters, it says '8 records found'. At the bottom right of the page, there is a pagination control showing '20 per page' and '1 of 1'. The footer contains the Magento logo, copyright information 'Copyright © 2017 Magento Commerce Inc. All rights reserved.', the version 'Magento ver. 2.2.0-dev', and a link 'Report an Issue'.

Filtering Options

4. When complete, tap **Apply Filters**. The subset of filtered customer groups and members displays.

☐ [To create a customer group:](#)

1. On the Admin sidebar, tap **Customers**. Then, choose **Customer Groups**.
2. Tap **Add New Customer Group**.
- a. Enter a unique **Group Name** less than 32 characters to identify the group.
- b. Select the **Tax Class** that applies to the group.

New Customer Group

← Back Reset **Save Customer Group**

Group Information

Group Name *
Maximum length must be less than 32 symbols

Tax Class *

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[Report Bugs](#)

Group Information

3. When complete, tap **Save Customer Group** .

☐ To edit a customer group:

1. On the Admin sidebar, tap **Customers**. Then choose **Customer Groups**.

2. Open the record in edit mode.

3. Make the necessary changes.

4. When complete, tap **Save Customer Group** .

☐ To assign a customer to a different group:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.

2. Find the customer in the list, and mark the checkbox in the first column.

a. Set the **Actions** control to “Assign a Customer Group.”

b. Set the **Group** control to the new group.

c. When prompted to confirm, tap **OK** .

Customers

[Add New Customer](#)

Search by keyword

[Filters](#) [Default View](#) [Columns](#) [Export](#)

Actions 5 records found (1 selected) 20 per page < 1 of 1 >

- Delete
- Subscribe to Newsletter
- Unsubscribe from Newsletter
- Assign a Customer Group
 - General
 - Wholesale
 - Retailer
 - Members
- Edit

Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Date of Birth	Tax VAT Number	Gender	Action
roni_cost@example.com	General	(555) 229-3226	49628-7978	United States	Michigan	Dec 4, 2015 11:44:56 AM	Main Website		Default Store View				Edit
	General			ed es	California	Dec 11, 2015 11:56:57 AM	Main Website		English			Male	Edit
<input checked="" type="checkbox"/> 3 John Doe johndoe@example.com	General	(000) 123-4567	95008	United States	California	Dec 11, 2015 11:58:10 AM	Main Website		English			Male	Edit
<input type="checkbox"/> 4 John Smith johnsmith@example.com	General	(000) 123-4567	90232	United States	California	Dec 11, 2015 11:58:57 AM	Main Website		English			Male	Edit