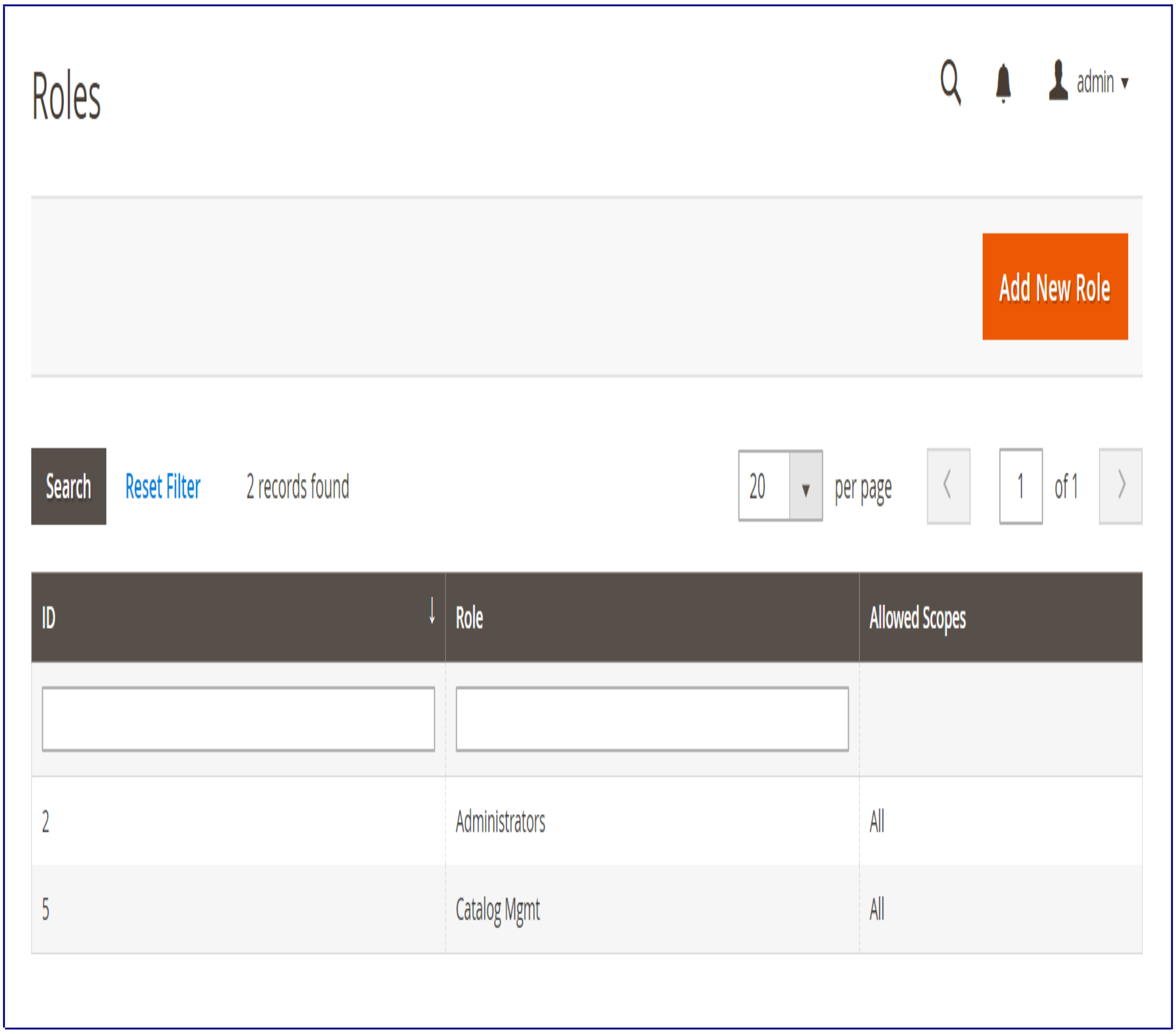
User Role Management in Magento2

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.



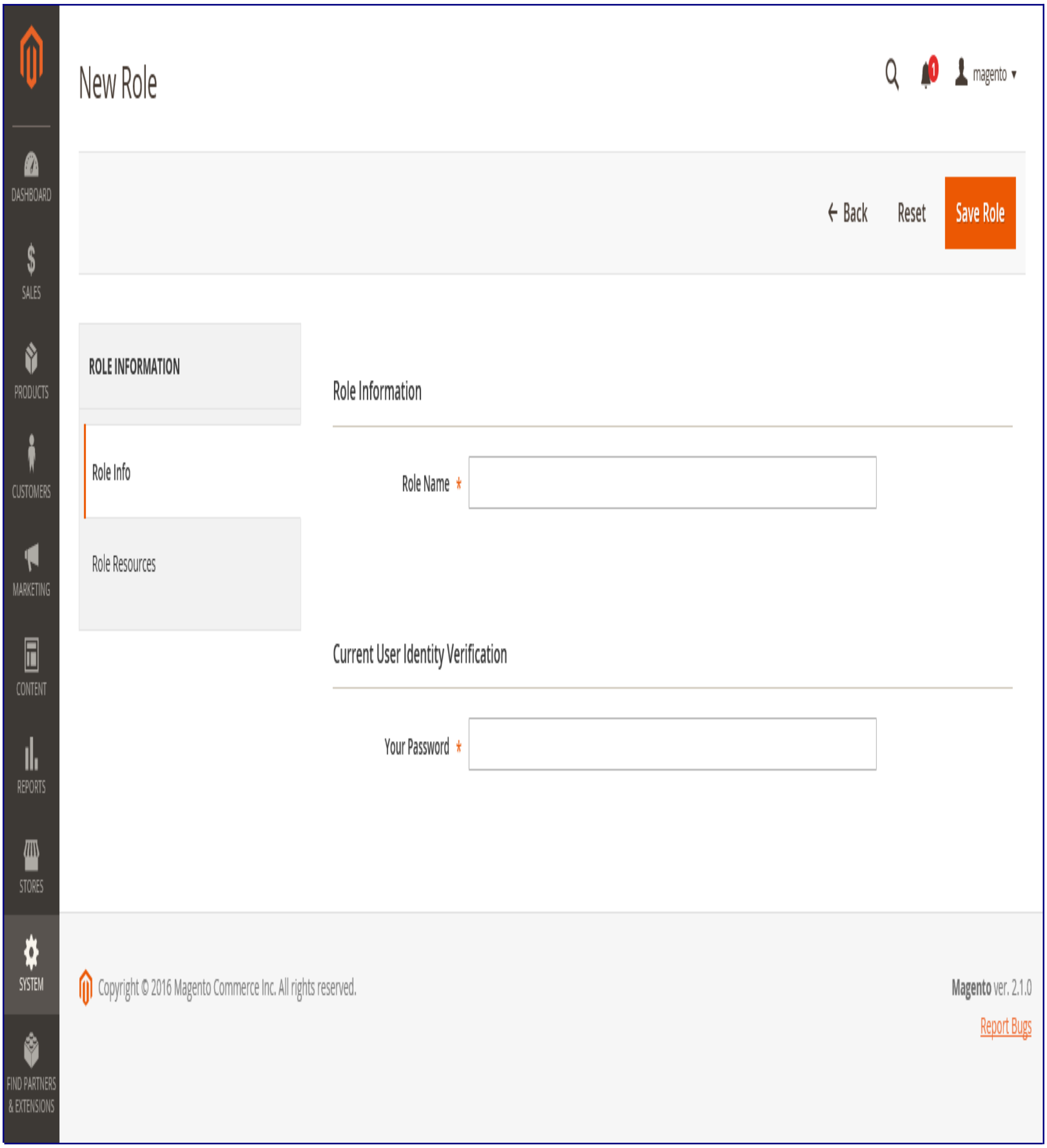
Roles

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**.



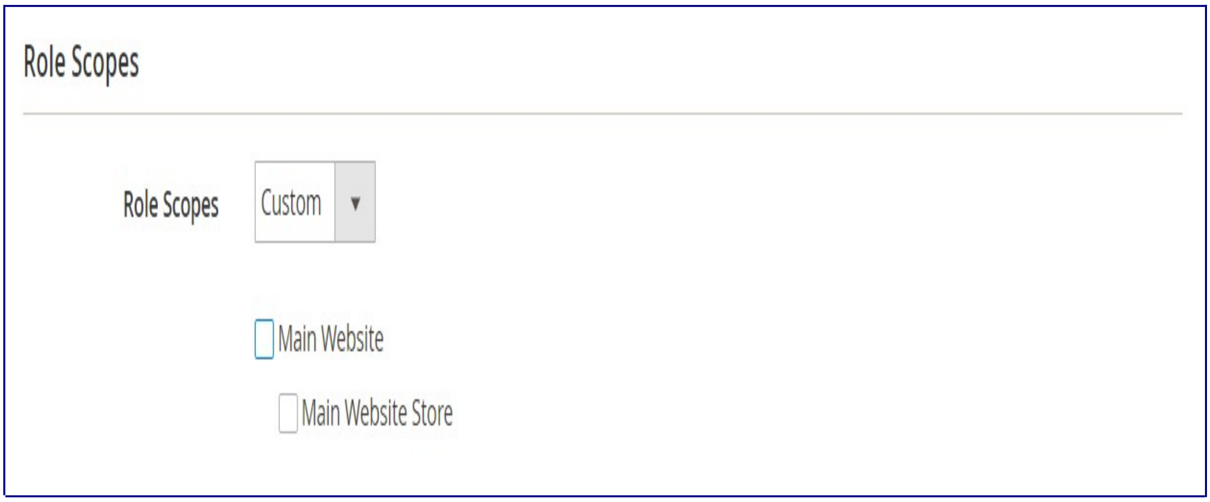
Role Name

☐ **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

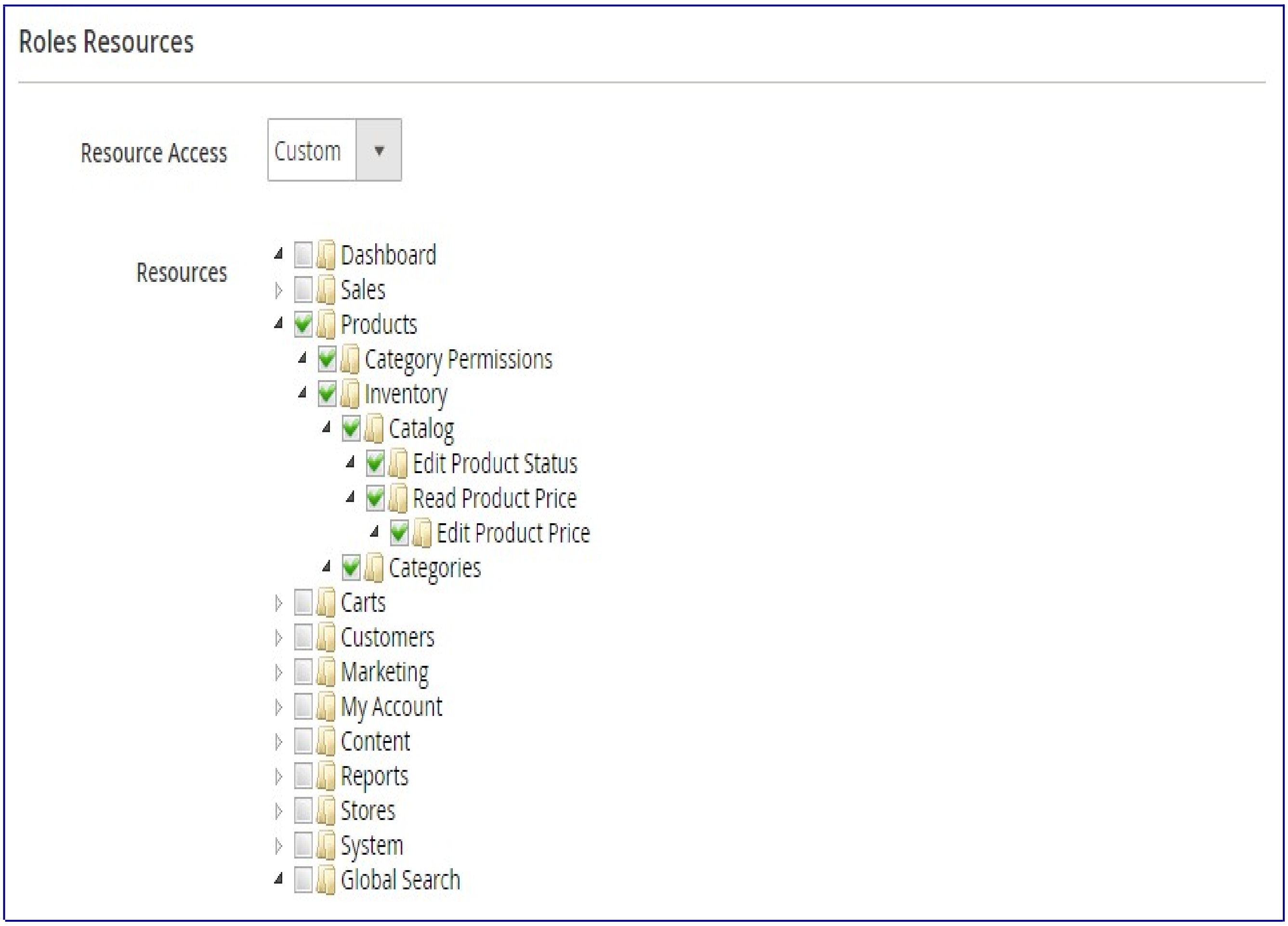
If set to “Custom” for a multisite installation, mark the checkbox of the website and store where the role is to be used.



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.



Role Resources Assigned

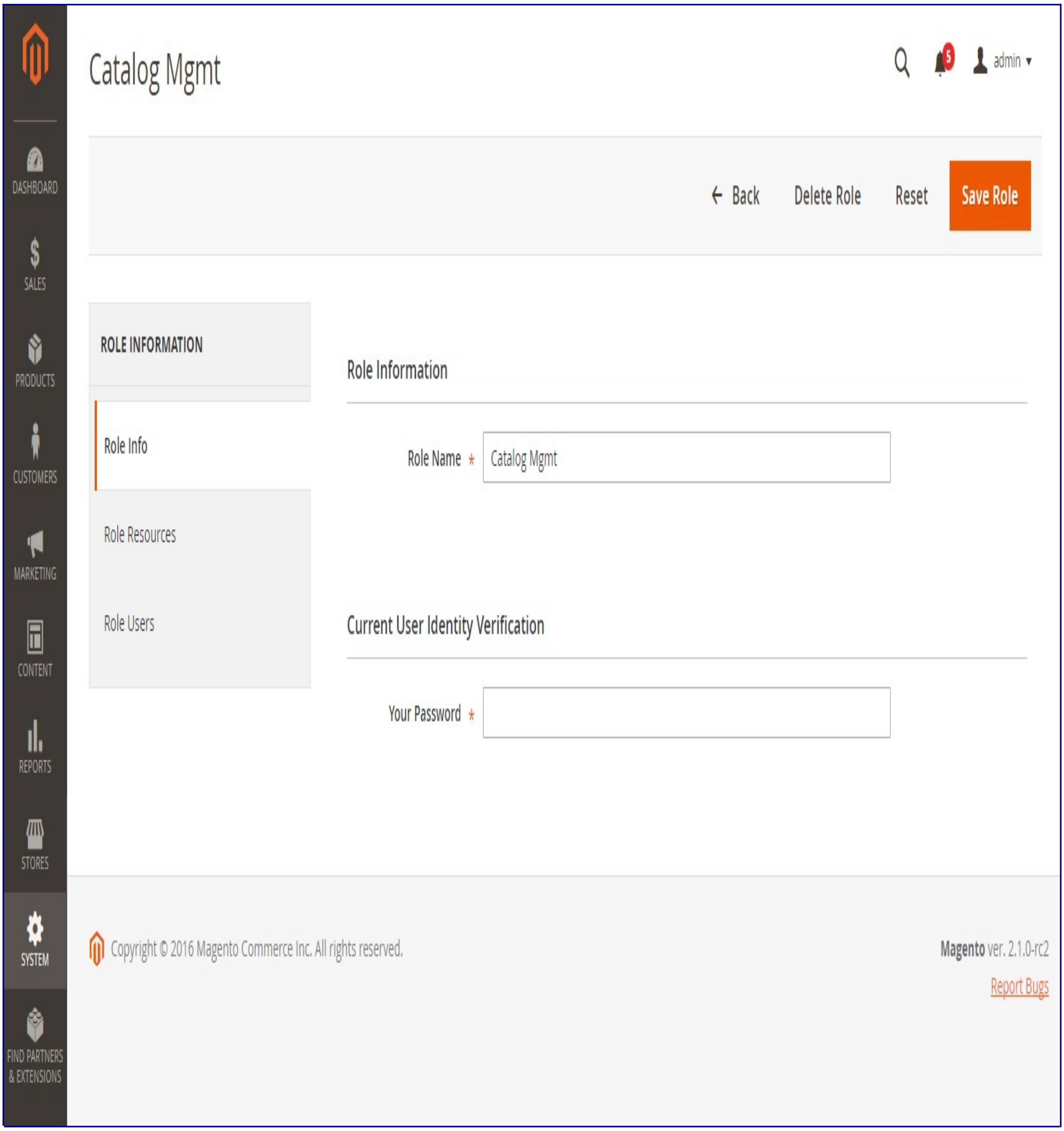
The list of available permissions may include additional options for Magento developed, Core Bundled, and installed extensions. By selecting the top-most permission for each feature, you assign all permissions available for the user.

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**.

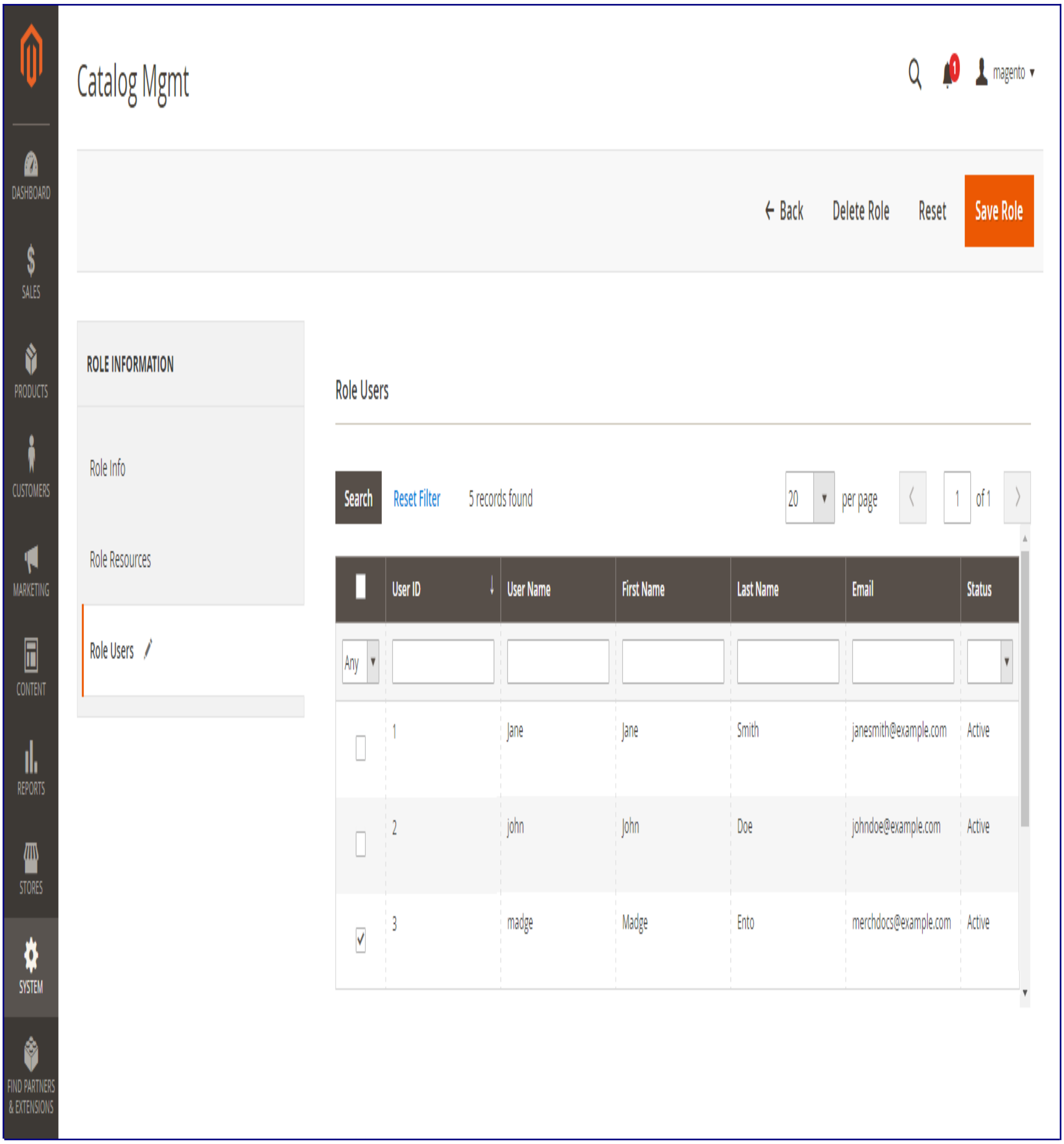


Editing a Role

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

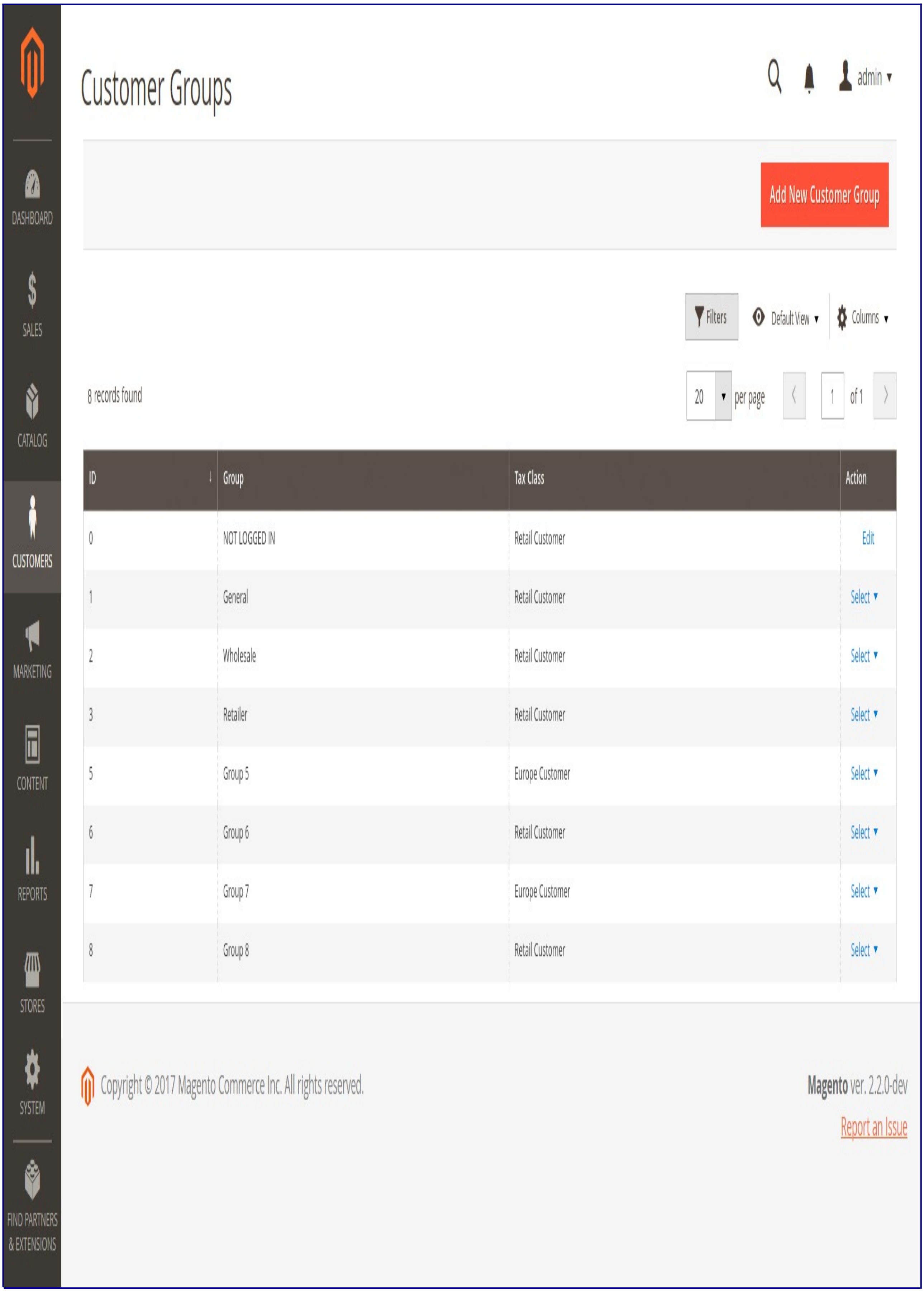
The Role Users option appears only after a new role is saved.

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.


Catalog Mgmt
magento
DASHBOARD
SALES
PRODUCTS
CUSTOMERS
MARKETING
CONTENT
REPORTS
STORES
SYSTEM
FIND PARTNERS & EXTENSIONS
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
User ID
User Name
First Name
Last Name
Email
Status
Any
1 Jane Jane Smith janesmith@example.com Active
2 john John Doe johndoe@example.com Active
3 madge Madge Ento merchdocs@example.com Active
Role Users

Customer Groups

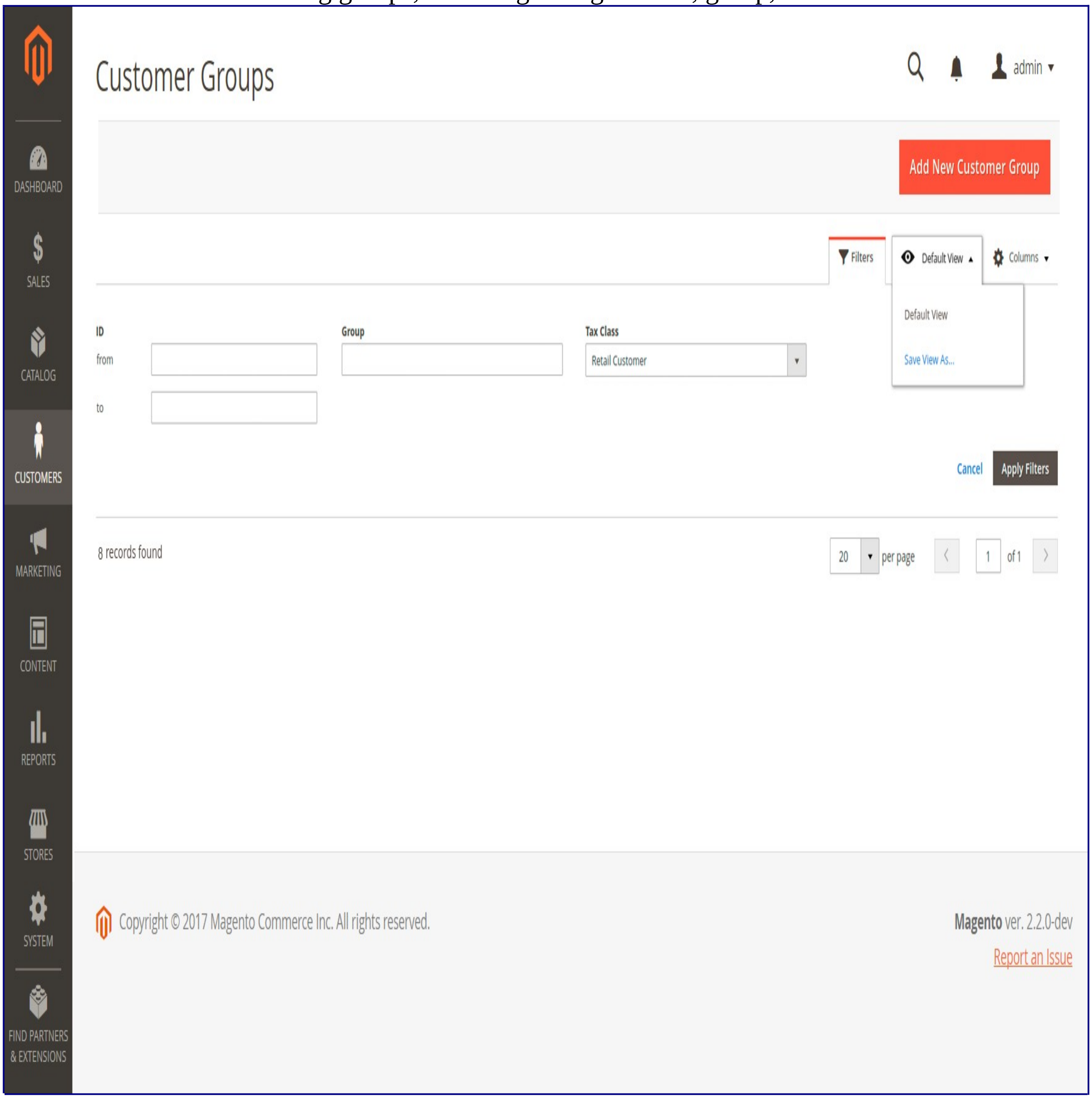
Customer groups determine which discounts are available, and the tax class that is associated with the group. The default customer groups are General, Not Logged In, and Wholesale.



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.



Filtering Options

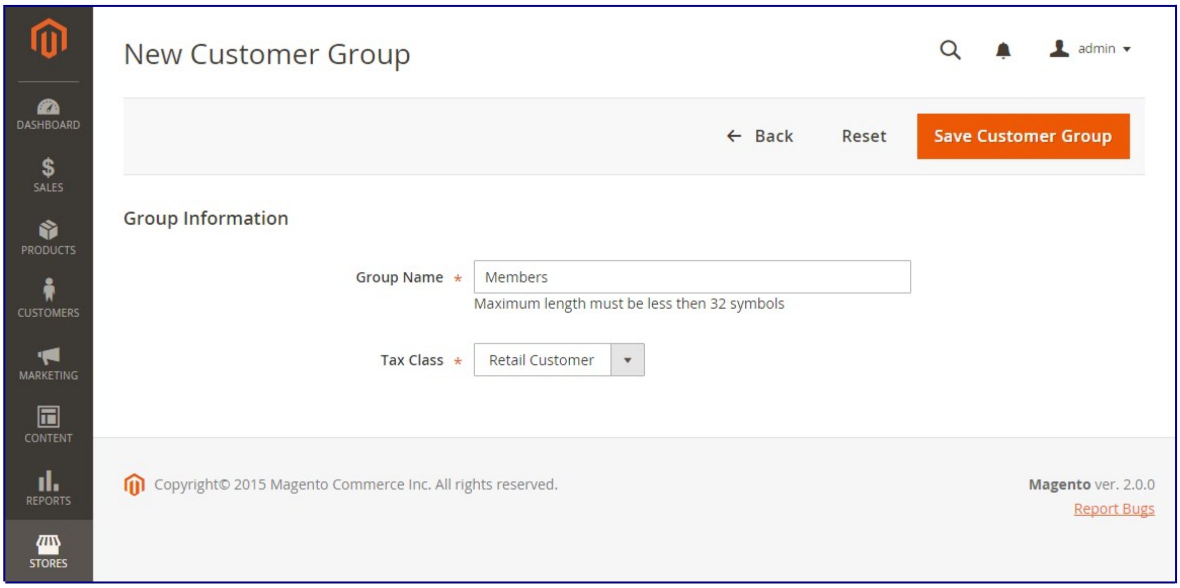
4. When complete, tap Apply Filters. The subset of filtered customer groups and members displays.

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.



Group Information

3. When complete, tap Save Customer Group .

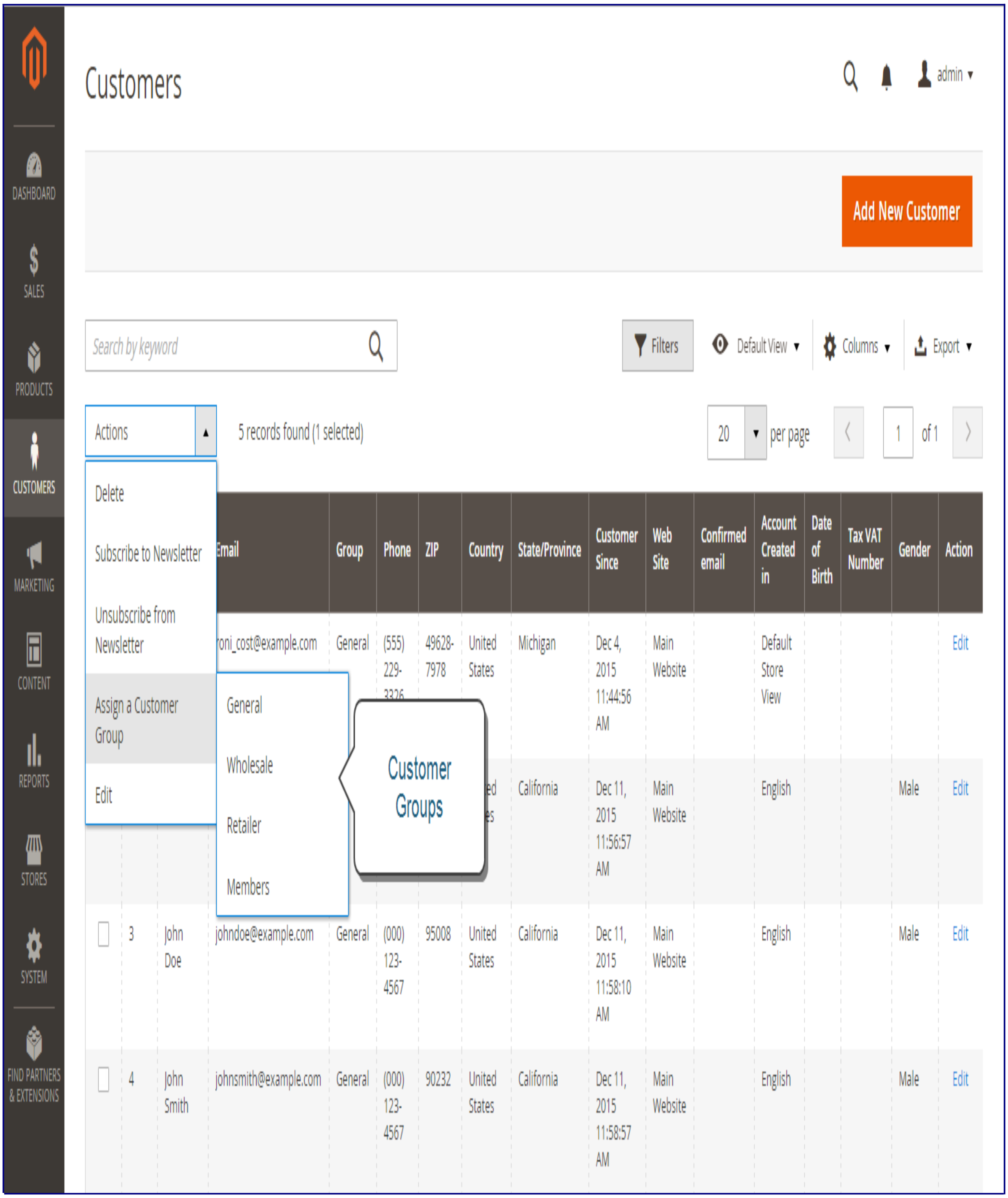
To edit a customer group:

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 .



Assign a Customer Group

To delete a customer group:

1. On the Admin sidebar, tap **Customers**. Then choose **Customer Groups**.
2. Open the record in edit mode.
3. In the button bar, tap **Delete Customer Group**.
4. When prompted to confirm, tap OK.
5. When complete, tap Save Customer Group .