



26 Creating a role using Budget Manager

A role is a set of permissions that determines the function and responsibility a user has on Budget Manager. There are two main role categories:

Generic roles are created by shop4support's system administrator and are available to all organisations.

Specific user roles are created by administrators belonging to organisations who use Budget Manager. These specific user roles are tailor made to that organisation's needs.

How to create a role

Simply follow the steps below:

1. Go to the Administration function.
2. Expand the Account Set-up folder.
3. Click on Roles.
4. Click on the Add button.
5. Input the role details.
6. Select the required role permissions.
7. Mark the Rules that are relevant to this role
8. Click on the Yes or No buttons as required.

Once you have completed all the relevant fields, click on the Save and Close button.

You will then be able to find the role within a list in the Administration function/Account Set-up/Roles folder. Here, you can add further information to the role, such as Role name and permissions.

Please note: Information fields marked with an asterisk (*) are mandatory.