Overview Video

https://www.youtube.com/embed/YYkz-gzmsMY

Step-by-Step Tutorial Guide

Step 1: Open the User & Roles Module

1. Log in to the TankhaPay dashboard.
2. From the left-side navigation panel, navigate to **User & Roles**.
3. Click **User & Roles** to open the module.
4. The page displays the list of existing users and their assigned roles.

This module allows administrators to create users, assign roles, and manage system access permissions.

Step 2: View Existing Users

1. On the **User & Roles** page, review the list of configured users.
2. Each user record displays details such as:
   - User Name
   - Employee Name
   - Assigned Role
   - Email ID
   - Status
3. Use the search option to locate a specific user.
4. Review the current role assignments before making any changes.

This provides a centralized view of all users who have access to the system.

Step 3: Add a New User

1. Click **Add User**.
2. The user creation form opens.
3. Begin entering the required user information.

This feature is used to provide system access to employees or administrators.

Step 4: Enter User Details

1. Select the **Employee** from the available list.
2. Enter or verify the user's:
   - Name
   - Email Address
   - Mobile Number (if applicable)
3. Ensure all mandatory fields are completed.

The selected employee will be linked to a system login account.

Step 5: Assign a Role

1. Locate the **Role** dropdown.
2. Select the appropriate role for the user.
3. Assign the required access level based on the employee's responsibilities.
4. Verify the selected role before saving.

Role assignments determine which modules and features the user can access.

Step 6: Configure User Permissions

1. Review the permissions associated with the selected role.
2. Enable or restrict access to specific modules, if customization is available.
3. Verify that the assigned permissions match the user's responsibilities.

Proper permission management helps maintain system security and controlled access.

Step 7: Save the User

1. Review all entered information.
2. Confirm the employee and assigned role.
3. Click **Save** or **Submit**.
4. The system creates the new user account successfully.

The newly created user is now added to the User & Roles list.

Step 8: Edit an Existing User

1. Locate the required user from the list.
2. Click the **Edit** icon.
3. Update user information or modify the assigned role.
4. Save the changes.

This allows administrators to update user access whenever employee responsibilities change.

Step 9: Enable or Disable a User

1. Select the required user.
2. Change the user's **Status** to **Active** or **Inactive**, as required.
3. Save the changes.

Disabling a user prevents system access without deleting the user record.

Key Benefits of the User & Roles Module

- Centralized user account management.
- Role-based access control for improved security.
- Simplified user creation and management.
- Flexible assignment of permissions.
- Easy modification of user roles and access.
- Improved control over system administration.

End of Tutorial

You have now completed the **User & Roles** walkthrough in TankhaPay.

This module enables administrators to efficiently manage user accounts, assign appropriate roles, and control access to different modules, ensuring secure and organized system administration.

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