Roles

Overview

The Roles page is a valuable tool for creating and managing roles that users can assign. It allows you to tailor their access to Channels according to your specific requirements.

This functionality empowers you to establish users with diverse access levels and provides a high degree of customisation to align with your unique needs. Whether you need to grant restricted access or define specific permissions, the Roles page equips you with the flexibility to manage user access effectively.

Accessing the Roles Page

To access the companies section, begin by selecting your username, which is located in the upper right corner. Then, from the ensuing menu, choose "Roles."

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Permissions Explained

Permissions Overview

Permission	Description
Create	Allows the creation of new entries or records.
Delete	Permits the deletion of entries or records.
View	Grants access to view entries or records.
Update	Enables updates or modifications to existing entries or records.
Fulfillment	Grants permission to fulfil orders.
Fulfillment Update	Enables updating the fulfilment status of orders.
Data Protection	Ensures that all client-based information will appear randomized to the user.
Update Interval	Allows setting the interval at which webhooks are updated.

Permissions by Page

This table offers a quick reference for understanding the permissions for each page or field in your Channels account. Use this guide to efficiently configure roles and assign appropriate permissions based on job titles and responsibilities.

Page	Create	Delete	View	Update	Fulfillment	Fulfillment Update	Data Protection	Update Interval
General			✓				✓	
Transaction Records			✓					
Dashboard			✓					
Channels	✓	✓	✓	✓				
Couriers	✓	✓	✓	✓				
Customers	✓	✓	✓	✓				
Helpdesk	✓							
Hosted Pages	✓		✓					
Invoice	✓		✓	✓				
Orders	✓	✓	✓	✓	✓	✓		
Plugins	✓		✓	✓				
Products	✓	✓	✓	✓				
Roles	✓	✓	✓	✓				
Rule Engines	✓	✓	✓	✓				
Stores	✓	✓	✓	✓				
Users	✓	✓	✓	✓				
Webhook	✓	✓	✓	✓				✓

Creating a New Role

To create a new role, start by clicking the "+ Add" button in the Roles page's top right corner. This action will take you to a dedicated page for role creation, where you can set the desired name for the role and choose the permissions you wish to associate with it. The process is user-friendly, allowing you to easily toggle permissions for actions such as "Create," "View," "Update," and "Delete" for various channel functionalities.

Enabling this feature in the "Data Protection" section ensures that all client-based information will appear randomised to any user assigned to this role, enhancing data security.

Once you've configured the role to your specifications, click the "Save" button at the bottom of the page to confirm the role's creation. Upon saving, you'll be directed back to the Roles page, where you'll find the newly created role listed alongside existing ones.

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Editing Roles

To edit a role, begin by navigating to the Roles page. Once there, look for the action section next to the role entries on the right side. This section shows two distinct buttons: a pen icon, which signifies editing, and a trash bin icon designed for role deletion.

If you choose to edit a role, click the pen icon. This action will redirect you to a page that mirrors the role creation page, allowing you to modify all aspects of the role.

If you wish to delete a role, click the trash bin icon. It will trigger a popup window atop the page, prompting you to confirm the deletion. If you proceed by clicking "OK," your action will be confirmed, and the role will be permanently removed from the system.

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