Create a User Role

How to Create a User Role in Muhasib ERP

Overview

This guide will help you create a least-privilege role, assign companies, and prepare it for user assignment.

The role becomes available for users. Permission nodes absent because of the current plan cannot be granted through the role.

Who can do this

You need access to System Users Rights and System Users Rights Add.

Before you start

Define the job outcome, required companies, modules, reports, add/update/delete/custom actions, and segregation-of-duties restrictions.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → User Management → User Roles and Permissions.

Create a User Role

Step 1: Choose New Record

Step 2: Enter a unique Role Name and useful Description

Step 3: Select only the companies required by this role

Step 4: Expand the permission tree

Step 5: Grant base system access and the minimum module/view permissions

Step 6: Grant Add, Update, Delete, printing, email, SMS, and custom rights

Grant Add, Update, Delete, printing, email, SMS, and custom rights only when the job requires them.

Step 7: Choose Save

Step 8: Assign a controlled test user and verify effective access

Check your work

Sign in as the test user and check both allowed and prohibited tasks in each assigned company.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not copy the super-administration role for ordinary users.
- A missing node may indicate an unlicensed feature, not a form error.

Related guides

- Grant and Revoke Muhasib Permissions

- Audit a User's Effective Access
- Create a System User

What to do next

> **Grant and Revoke Muhasib Permissions**.

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