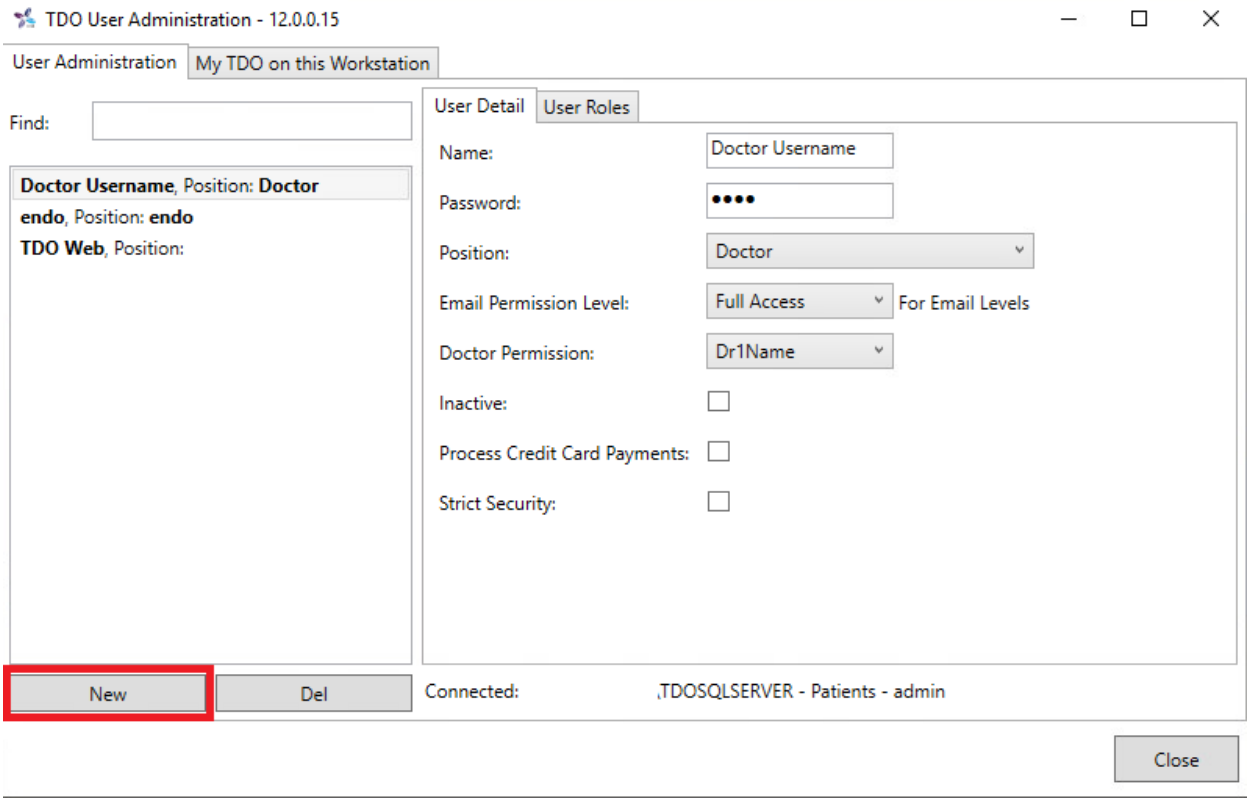
Adding Users and Security Levels - User Roles

65 TDO KB September 4, 2025 Program Setup 12.81K

Version 12

1. On the **Setup** tab, click **Site Configuration** and select **Add/Edit User Names and Passwords**.
2. To add a user, click **'New'**.



3. Select a Position for the user.
4. Select an Email Permission Level for the user. (Full Access can see all internal emails, Manager can see their own and the Staff's, and Staff can only see their own)
5. Select which Doctor the user will have access to (in the case of multi-doctor practices). Select **'Practice'** to give them access to all the Doctors in the practice.
6. Checking 'Strict Security' will ensure that the user sets a strong password and that they update this password regularly.
7. Checking 'Process Credit Card Payments' will allow the user to initiate credit card transactions through an integrated credit card processor.
8. Click the **'User Roles'** tab to select a role for this user.
9. You can click **'Edit Roles'** from this tab to edit the menus and functions available to the user roles, or create a new user role.
10. Log out and log back in for changes to take effect.

Version 11

1. Click **Administrative** on the top menu bar
2. Select **Add/Edit User Names and Passwords**
3. All employees should be listed with a security level and a password. Only a “Full Access” security user can add or edit people here.
4. If an employee has “Staff” group access, they will not be able to make adjustments, financial voids, or run any financial report that is not a “Daily” one.
5. Make sure to edit Doctor Permissions in the case of a multiple doctor practice

Online URL: https://kb.tdo4endo.com/article.php?id=65