

# **WAY-Plan User Guide**

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## **The users rights**

# Summary

## The rights of users

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# Why create multiple users profiles?

If multiple people need to access the WAY-Plan software,  
each user works with their personal login.

After creating the user, you can attach this person to a role that will give him specific rights to the data of your structure: planning, invoices, statistics, etc.



## ONE LOGIN PER USER

Everyone works with  
its secure personal login.



## ACCESS CONTROL

Each user has access to the  
data necessary for his work.



## ACTIONS HISTORY

all actions performed by the  
employee are recorded.

# Create a new user

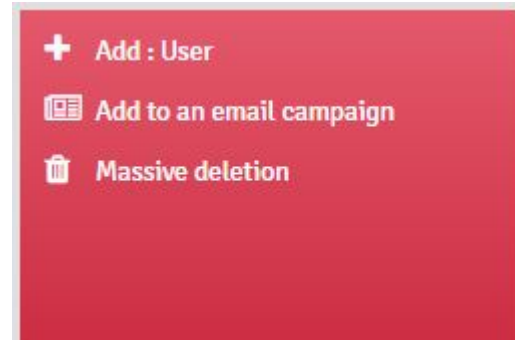
1

To create a new employee, go to "Configuration" menu and select "USERS".



2

In the top right corner, click "+ Add: User".



# Create a new user

Add : User

Civility :

Name \* :

First name \* :

Role \* :

Login \* :

Personal E-mail :

Security email address \* :

Mobile phone :

Phone :

Address :

Zip code :

City :

Creation date :

☒ State :  
Dispatch If this box is checked, the employee will receive an automatic email if a job sent by WAY-Corp is not processed within 15 minutes. : ☐

Language :

Users created as admin have access to all menus.

Only the manager of the company should have an admin profile because he has the widest rights over the software.

For the employees of the company, it will be a matter of choosing the role best suited to the position of the person. Each role corresponds to specific data access rights.

Role Selection  
defines the user's rights.

# Profiles available

Profile	Adapted for
Admin	The manager and the persons in charge of the deployment of the software in the company.
Assistant	The Assistant of the agency
Assistant without Invoicing	Assistants who have no right to issue invoices.
Control	The Dispatch manager
Dispatch	The Dispatch agent
Commercial	The commercial agent
Invoicing	The Invoicing agent
Accounting	The external accounting officer of the company
Trainee	The Trainee (internship)

# The specific rights of the main profiles

Customers MENU	Assistant		Control		Dispatch		Invoicing		Commercial	
	Read	Modify	Read	Modify	Read	Modify	Read	Modify	Read	Modify
Customers										
Customers contacts										
Passengers										
Class of Customers										

## Légende :

- **Read** : the employee has the right to consult the data
- **Modify** :the employee has the right to act on the data (add, modify or delete a record if the action is allowed by the software).
- If the "Read" and "Modify" boxes are in red, the menu is not displayed at all.
- The "Assistant without invoice" profile has the same rights as the Assistant profile, except that the invoice generation and mission deletion are blocked.

Reminder: Employees created as admin have access to all menus.





ORDERS MENU	Assistant		Control		Dispatch		Invoicing		Commercial	
	Read	Modify	Read	Modify	Read	Modify	Read	Modify	Read	Modify
Orders										
Planification Orders										
Invoicing Orders										
Folders Template										

NB : The deletion of missions and Orders is only possible for the admin, Assistant and Invoicing profiles.

MENU Invoicing	Assistant		Control		Dispatch		Invoicing		Commercial	
	Read	Modify	Read	Modify	Read	Modify	Read	Modify	Read	Modify
Invoices										
Payments to come										
Paid Regulations										
Credit Note										

NB :

- The generation of an invoice is only allowed for employees in profile: admin, assistant, commercial and invoicing.
- Invoice deletion is locked for all profiles, for compliance with current tax standards.
- Modification of certain invoice data is possible for the "admin" profiles until the export to accounting. The invoice can be passed manually as "exported" or automatically after generation of the export file.



[illegible]



[illegible]

[illegible]





[illegible]

[illegible]

[illegible]

# Delete a user

When an employee leaves the company, disable their access.

User <span>30</span>								
24 results								
<input checked="" type="checkbox"/>	User	Role	Login	Personal E-mail	Mobile phone	Phone	State	Language
<input type="checkbox"/>	Freddy GOMES MONTEIRO	Profils admin	freddy	freddy@waynium.com				English
<input type="checkbox"/>	Dorian Debruyne	Profils admin	Dorian	dorian@waynium.com				French

Disabling an employee access allows you to :

- prevent the employee from connecting to the back office;
- keep the history of the actions performed on the software (add, modify, delete data).

You can also change the user's login, which will also block their connection to the software.

State  
Green: login is active  
In red: login is inactive

# Restrict access to a client or an Order

You can manage permissions to limit an employee's access to data:

- one or more Customers,
- or to one or more specific Orders.

User 30

24 results

<input checked="" type="checkbox"/>	User	Role	Login	Personal E-mail	Mobile phone	Phone	State	Language
<input type="checkbox"/>	Freddy GOMES MONTEIRO	Profils admin	freddy	freddy@waynium.cor				English

Modify : User Freddy GOMES MONTEIRO

Add : Allow collaborator on that customer

Add : Allow collaborator on that folder

Delete

Historical events

Login as...

Reset password

City :

Creation date :

If customer permissions are created, the employee will only have access to the data of the Customers concerned.

If authorizations on Order are created, the employee will only have access to the Orders concerned.

# In brief

- The main principles of employee management:
- Each person having to access the software must have their own login, to be created in "Settings > User".
- Only the manager of the business should be created as an admin.
- Each user will have a profile and access related to their position in the company: commercial, Invoicing, Dispatch, etc.
- It is possible to restrict an employee's access to a client or an Order, for example during an event.
- All employee actions are kept in "Missions > History" for 6 months.

# It's up to you!

For any additional questions:  
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[www.waynium.com](http://www.waynium.com)