

Principal Users

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Shotec S.A.E

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Users > Principal user

SaveSave and CloseX

Email
Enter Email

Accessible account
+

☒ Active user

Title	First Name	Middle Name
Last Name	Display Name	
Mobile Enter Mobile		
Allowed Branches		
☒ Shotec S.A.E	☐ Shotec Gulf	☐ Shotec GmbH
☐ Shotec IP GmbH	☐ Cronittec	
User Roles		
☐ SupperAdmin	☐ Sales Manager	☐ Team Leader
☐ Sales Engineer	☐ Shotec Secretary	☐ Purchasing Manager
☐ ShotecFinanceManager	☐ Section Head	☐ Admin
☐ Sevice Admin	☐ Principal Netzsch	☐ Principal Lewa
☐ Project Manager	☐ Owners	☐ Warehouse Keeper
☐ Accountant	☐ Assistant Sales Manager	☐ MrmBooking
☐ MrmSales	☐ Mazen_Almaddah	☐ Shorosh Test
☐ Junior Sales Engineer		

Overview

Settings

Before saving a principal user record, review the available fields and set the required security-related options:

Field	Use
Enter Email	Enter the principal user's email address.
Enter Mobile	Enter the principal user's mobile number.
selectedBranch	Select the branch associated with the principal user.
twoFactorAuthentication	Set the two-factor authentication option for the principal user.
files[]	Use this area for files associated with the record.

Note: Confirm the selected branch and two-factor authentication option before saving. These settings should reflect the user's intended operational and security context.

Workflow

1. Open the Principal Users form and begin entering the principal user's details.

Enter the user's email address in **Enter Email** and mobile number in **Enter Mobile**. Select the appropriate value in **selectedBranch**.

2. Decide whether to apply two-factor authentication.

Review **twoFactorAuthentication** and set it as required for the principal user. This decision should be made before the record is saved so that the saved record reflects the intended security setting.

Tip: Use an email address and mobile number that are current and monitored. This makes the principal user record easier to identify and maintain.

3. Decide whether supporting files are required.

If you need to associate files with the user record, use **Attach** and review the **files[]** area. Select **Ok** to complete the attachment action when prompted.

4. Choose how to finish the record.

- Select **Save** to save the principal user record and remain on the form for further review or changes.

- Select **Save and Close** to save the record and close the form.
- Select **Cancel** if you do not want to continue with the current entry.
- Select **Close** when you need to leave the form without using the save-and-close option.

Warning: Do not use **Cancel** when you intend to retain the entries you have made. Save the record first with **Save** or **Save and Close**.

5. Maintain or remove an existing principal user record when necessary.

Open the relevant record, revise **Enter Email**, **Enter Mobile**, **selectedBranch**, or **twoFactorAuthentication** as required, and select **Save**.

If the principal user record should no longer be retained, select **Delete**. Use **Delete** only after confirming that you are working on the correct record.

6. Review related items when available.

Select **Tickets** to access the tickets action associated with the principal user record. Use **Attach** when you need to add files to the record.

Examples

A warehouse manager needs to add a principal user record for a colleague who supports stock operations.

1. Open the Principal Users form.
2. In **Enter Email**, enter `morgan.lee@example.com`.
3. In **Enter Mobile**, enter `+1 555 014 9821`.
4. In **selectedBranch**, choose the branch that applies to Morgan's warehouse responsibilities.
5. Review **twoFactorAuthentication** and set the option required for this user.
6. If a supporting document is needed, select **Attach**, add the file, and select **Ok**.
7. Select **Save and Close** to retain the completed principal user record and leave the form.

If Morgan later changes mobile number or moves to another branch, open the existing record, update **Enter Mobile** or **selectedBranch**, and select **Save**.

Tips

Tip: Save the record with **Save** when you need to check the entered details before leaving the form.

Note: Use **Save and Close** when the email, mobile number, branch selection, and two-factor authentication setting have all been reviewed.

Warning: Select **Delete** only for a record that should be removed. Review the email and branch information before confirming this action.

Troubleshooting

Symptom	Likely cause	Fix
The principal user record is not retained after leaving the form.	The form was closed or cancelled without saving.	Reopen the record, enter the details again if necessary, and select Save or Save and Close .
The record contains the wrong contact information.	An incorrect value was entered in Enter Email or Enter Mobile .	Open the record, correct the relevant field, and select Save .
The principal user is associated with the wrong branch.	The wrong option was selected in selectedBranch .	Update selectedBranch and select Save .
A supporting file is missing from the record.	The file was not added through the attachment action.	Select Attach , add the required file, select Ok , and save the record.

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- [Getting Started with Security](#)
- [users](#)