SHERKETY BYTES ALIGN

Understanding User Administration and Account Visibility

August 25, 2026

Opening the user administration area

In **Sherkety ERP & Website Platform**, user administration is available from the admin area after you sign in with an account that has permission to manage users. If you have already worked through Reviewing User Access and Resolving Common Admin Issues, you already know how access problems can affect what appears in the admin menu. Here, the focus is on where to go and what you can do once the user area is available.

Open the admin area and go to **Settings**, then look for the section used for **Users & Companies**. This is where account records are maintained. The main screen is the **Users** list, which shows existing accounts in a searchable table or list view.

On this screen, you typically work from two main entry points:

- **Open an existing user** by clicking a row in the **Users** list
- **Create** a new account by clicking the **Create** button from the list view

The **Users** list is the starting point for most account work because it lets you review who already has access before making changes. Each row in the list represents one account record that you can open for more detail.

If you do not see **Settings** or any user-related menu, that usually means your current account does not have the required administration rights. In that case, the menu is not simply hidden by mistake; it reflects the permissions assigned to your account. Someone with higher access will need to update your rights before you can manage users.

[SCREENSHOT: Admin area with Settings open and the Users list highlighted]

Reviewing the account list and finding specific users

The **Users** list is designed for quick review. Each row represents one account, making it easier to scan the current user population before opening individual records. When you are checking whether someone already exists, confirming account status, or preparing to update access, start here instead of creating a new record immediately.

Use the **search bar** at the top of the list to find a person quickly. Search works best when you enter details such as:

- **User name**
- **Login**
- **Email**

This is especially useful when the list includes many internal staff, portal users, or older accounts. If your first search does not return the expected result, try a shorter version of the name or search by email instead.

To narrow the list further, use the available **filters** and **grouping** options. These controls help when you need to review only certain types of accounts or organize the list in a more useful way. For example, filters can help you focus on active accounts or bring archived records back into view, while grouping can make large lists easier to review by category.

Once you find the right row, click it to open the full user form. That record is where you inspect details such as:

- Basic profile information
- Assigned access rights
- Company-related settings
- Current account status

The list view is best for locating and comparing accounts. The user form is where you confirm the details and make changes. If you are reviewing a large number of records, combine **search**, **filters**, and **grouping** rather than scrolling through the full list manually.

[SCREENSHOT: Users list with search bar, filters, and one user record selected]

Understanding which accounts are visible to you

Not every administrator sees the same account list in **Sherkety ERP & Website Platform**. The users you can review depend on the permissions assigned to your own account. If your role includes broad user administration rights, you may see a wider set of records. If your role is more limited, some accounts may not appear or may open with fewer editable options.

Visibility can also change based on **company context**. In a multi-company setup, the accounts shown in the **Users** list may depend on the company you are currently working in. If you expect to see a user and do not, check whether you are viewing the correct company context before assuming the record is missing.

Different account categories may also appear differently depending on the filters you use:

- **Internal users** usually represent staff who sign in to work in the admin or operational areas
- **Portal users** usually have more limited access, such as viewing selected information
- **Public users** may appear differently from named staff accounts and can be easy to miss if your current filters are narrow

Another common reason for confusion is that archived or inactive accounts are often hidden from the default list. This helps keep the main **Users** view focused on active records, but it can make it seem as though a user has disappeared. If you need to review older accounts, adjust the active filters so archived records are included.

When a user is missing from view, check these items before taking further action:

- Your own **access rights**
- The current **company context**
- The active **filters**
- Whether the account may be **archived**

If you need a deeper explanation of role limits, refer back to Understanding Role Visibility and Access Restrictions.

Maintaining user accounts from the user form

Once you open a record from the **Users** list, the user form becomes the main place for account maintenance. This is where you create new accounts, update existing details, assign access, and control whether someone can continue signing in.

To add a new account, start from the **Users** list and click **Create**. Enter the core identity details shown on the form, including fields such as:

- **Name**
- **Email**
- Login-related details

- Company or profile settings, where available
- Language or contact preferences, where available

Before saving, review the record carefully so you do not create a duplicate account for someone who already exists under a slightly different name or email.

To update an existing account, open the user record from the list and edit the fields that need to change. Common updates include profile information, company assignment, and language settings. This is also where you review the **Access Rights** area and assign the permission levels that control which admin sections and business areas the user can open.

When someone should no longer sign in, use the option to **archive** the account rather than removing its history. Archiving keeps the record for reference while taking it out of the normal active list. If that person later needs access again, reopen the record and **reactivate** it instead of creating a brand-new account.

Use the user form for these common tasks:

- Create a new account
- Correct names or email details
- Change company assignment
- Update language preferences
- Adjust **Access Rights**
- Archive or reactivate the account

[SCREENSHOT: User form showing profile details and Access Rights section]

Managing different kinds of users

In **Sherkety ERP & Website Platform**, not all user accounts serve the same purpose. Choosing the correct user category is important because it affects what the person can see after signing in and what access options make sense on the record.

The main categories you will encounter are:

- **Internal users**
- **Portal users**
- **Public users**

Internal users are typically the people who work inside the business and need access to admin or back-office areas. These accounts are the ones most often given app access, operational permissions, and administrative roles. When maintaining an internal user, you will usually review their **Access Rights**, company assignment, and whether they should see specific admin sections.

Portal users are more limited. These accounts are generally used when someone needs access to selected information without full back-office visibility. When reviewing a portal account, the main goal is usually to confirm that the person has the right level of limited access rather than broad administrative permissions.

Public users are different again. They are not managed in the same way as named staff accounts and may appear differently in the user listing depending on your current filters and visibility rules.

Typical maintenance tasks by user type include:

- For **internal users**: grant or adjust app access and admin permissions
- For **portal users**: confirm limited access for the intended documents or areas
- For **public users**: review visibility carefully before assuming the account is missing or editable in the same way

Choosing the wrong category can cause confusion later. A person may be able to sign in but not see the expected apps, or an account may appear in the list but not behave like a staff account. Before changing detailed permissions, first confirm that the account is classified correctly.

Fixing common account visibility and maintenance issues

Most user administration problems in **Sherkety ERP & Website Platform** come down to visibility, permissions, or duplicate records. When something looks wrong, start with the list view and the user form before assuming the account is broken.

If a user does not appear in the **Users** list, check the basics first:

- Confirm the **search term** is correct
- Try searching by **name**, **login**, and **email**
- Review active **filters**
- Check whether archived accounts are hidden
- Confirm you are in the correct **company context**

A missing result often turns out to be a filter issue or an archived account rather than a deleted record.

If you can see a user but cannot open or edit the record, review your own administration rights. Limited administrators may be able to view some information without having permission to change it. If needed, ask a higher-level administrator to confirm that your account includes the required user management access.

If a user can sign in but cannot see the expected apps or records, open the account and review two things together:

- The selected **user type**
- The assigned **Access Rights**

A portal account with limited rights will not behave like an internal user, even if the person can log in successfully.

If an account seems duplicated or outdated, compare the **login** and **email** values across both records. Do not remove history by deleting the older record. Instead, keep the correct account active and **archive** the obsolete one so past references remain intact.

For broader troubleshooting patterns, see Viewing and Maintaining User Accounts and Managing Users and Role Based Access.

Overview

User administration in **Sherkety ERP & Website Platform** centers on one practical workflow: open the **Users** list, find the correct account, review the user form, and then update visibility or access as needed. The most important thing to remember is that what you see in the list is shaped by permissions, filters, company context, and whether an account is archived.

Keep these points in mind when working in the user area:

- The **Users** list is your main starting point for review and maintenance
- **Search**, **filters**, and **grouping** help you find accounts faster than manual scrolling
- Your own **access rights** affect which user records you can see or edit
- **Company context** can change which accounts appear in multi-company work
- **Internal**, **portal**, and **public** users are not interchangeable
- **Archived** accounts may be hidden until you change the current filters
- The **Access Rights** section on the user form controls what a person can open after sign-in

This area is less about creating accounts quickly and more about making sure each person has the correct visibility and access level. When reviewing a problem, avoid making immediate replacements or duplicate accounts. It is usually better to locate the existing record, confirm its category, and adjust the current settings.

If you need help with role logic before making changes, revisit Understanding Role Visibility and Access Restrictions. The next document in this series is Reviewing Access Restrictions and Common User Issues.

Prerequisites

Before you can manage accounts in **Sherkety ERP & Website Platform**, a few conditions need to be true. If any of these are missing, the **Users** area may not appear at all, or you may be able to open records without being able to edit them.

Make sure the following are in place:

- You can **sign in** to the admin area successfully
- Your account includes permission to access **Settings** and user administration
- You know which **company context** you should be working in, if your organization uses more than one company
- You have enough information to identify the person correctly, such as their **name**, **email**, or **login**
- You understand whether the person should be an **internal user**, **portal user**, or another account type before assigning rights

It also helps to be familiar with related admin topics before changing user records:

- Signing In and Accessing the Admin Portal
- Using the Admin Dashboard for Navigation
- Understanding Admin Page Access and Protected Navigation
- Reviewing User Access and Resolving Common Admin Issues

When preparing to update an account, gather the details you need before opening the form. For example, know whether you are correcting profile information, changing **Access Rights**, or archiving the account. Having that goal clear reduces mistakes, especially when several users have similar names.

If your menu options do not match what is described in this guide, stop and confirm your permissions first. In user administration, missing menu items usually reflect access restrictions rather than a navigation error.