Viewing and Maintaining User Accounts

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Opening the user administration page and understanding the account list

In Sherkety ERP & Website Platform, open the admin area and go to the **Users** page from the admin navigation. This page is where you review existing accounts, check who can access the admin area, and open individual records for updates. If you need help getting into the admin area first, see Signing In and Accessing the Admin Portal.

The main part of the page is the account list. Each row represents one user account. The list is designed for quick scanning, so pay attention to the most important columns first:

Column	What to look for
Name	The person's display name or full name
Email	The address tied to the account
Role	The level of access assigned to that user
Status	Whether the account is active or otherwise restricted
Updated or recent activity details	Signs that the record was recently maintained

[SCREENSHOT: User administration page showing the account list with name, email, role, and status columns]

Use the controls above the list to narrow what you see. A **Search** field helps you find a person by name or email. If the page includes filter controls, use them to show only certain **roles** or **statuses**. This is especially useful when you want to review only active users or only users with higher access.

You may also be able to sort the list by clicking a column heading such as **Name** or **Updated**. Sorting helps when you want to find recently changed records or scan alphabetically.

At the end of each row, look for actions that let you open the user's record. Depending on your access, you may see options to **Edit**, open account details, or review access information. Start from the list whenever you need to confirm whether a user exists, check their current role, or move into a full account review.

Reviewing a user's profile and account details

After you find the right person in the account list, open their record to review the full account details. This screen is where you confirm identity information, check current access, and make sure the account still matches the person’s role in the business.

Start with the core profile fields. Look for items such as **Full Name**, **Username**, and **Email**. These are the first details to verify when someone reports a sign-in problem or when you are checking whether the correct account was updated. If the record includes profile information beyond the basics, review those fields carefully rather than assuming older values are still correct.

Next, check the account’s current status. In Sherkety ERP & Website Platform, this may appear as a status label, badge, or selectable field. Common status values include whether the account is **active**, **disabled**, **locked**, or still waiting for activation. If a user says they cannot get into the admin area, this status section is often the first place to inspect.

Some user records also include organizational details. When these fields are present, review items such as:

- **Department**
- **Job Title**
- **Team**
- **Assigned Location**

These details help you confirm that the user belongs in the right part of the business and supports later access reviews.

[SCREENSHOT: Open user record showing profile details, status, and organizational fields]

Finally, look for record history information. Audit details usually appear near the top or bottom of the page and can include the date the account was created, the most recent update date, and signs of recent sign-in activity. Use these details to answer practical questions such as whether the account is still being used, whether another administrator recently changed it, or whether the profile has gone untouched for too long. When you review a user record, make it a habit to compare identity details, status, role, and recent activity together before making any changes.

Updating user information and keeping records current

When a user’s details change, update the existing record instead of creating a second account. In Sherkety ERP & Website Platform, open the user from the **Users** list, select the edit option if needed, and update the fields that no longer match the person’s current information.

Focus on the details administrators are expected to maintain regularly. These commonly include:

- **Display Name** or **Full Name**
- **Email**
- **Phone Number**
- **Department**
- **Job Title**
- **Team** or similar assignment fields

Use the values shown on the form exactly as needed for the current employee or admin user. For example, if someone changes departments, update the department field on their existing account. If a person’s name changes, revise the name on the same record so their access history stays connected to one account.

As you edit, pay attention to validation messages. Required fields usually cannot be left blank, and Sherkety ERP & Website Platform may stop you from saving if a key identifier is already used by another account. This matters most for fields such as **Email** or **Username**, which typically need to remain unique. If you see an error after clicking **Save**, review the highlighted fields first.

[SCREENSHOT: User edit form with required fields and save action]

After saving, confirm the change in two places:

1. Review the updated values on the user’s detail page.
2. Return to the account list and make sure the list now shows the new name, email, role, or status.

This double-check helps you catch partial updates or unsaved edits right away. Use updates for normal maintenance such as role changes, contact detail corrections, department transfers, and title changes. Create a separate account only when you are adding a truly different person, not when an existing user’s information has changed.

Managing roles, permissions, and account access

The user record includes the area where you manage access. This may appear as **Role**, **Roles**, **Permissions**, or a similar section on the account page. Use this area to control what the person can open in Sherkety ERP & Website Platform, especially within the admin pages.

Start by reviewing the current role assignment before making changes. A role determines which admin pages and actions are available to that user. For example, some users may only need content editing access, while others may need broader administrative visibility. If the role shown on the account does not match the person's current responsibilities, update it from the role or permission section on the record.

To change access, open the role area and add or remove the appropriate assignment. After saving, return to the user details and confirm that the new role is displayed correctly. If the page includes a permission summary, review it to make sure the account now reflects the intended level of access.

You may also see account controls tied to access status. Depending on what your admin role allows, these controls can include actions such as:

- **Activate** an account so the user can sign in
- **Deactivate** an account when access should be removed
- **Lock** or **Unlock** an account if sign-in access needs to be restricted or restored
- Reset access-related settings when a user needs to regain entry

[SCREENSHOT: User access section showing role assignment and account status controls]

After any access change, verify the result instead of assuming it applied correctly. Check the role shown on the record, review any visible permission summary, and confirm the account status is still correct. If a user reports that they still see the wrong pages after a role update, the next document, Understanding Role Visibility and Access Restrictions, explains how visibility rules affect what users can actually see after you change their account.

Maintaining accurate access records over time

User administration is not a one-time task. In Sherkety ERP & Website Platform, the **Users** page works best when administrators review it regularly and keep account records aligned with real staffing and access needs.

A good routine starts in the account list. Use the available **Search**, **Status**, and **Role** filters to look for accounts that need attention. Focus especially on users who are inactive, users whose profiles have not been updated recently, and users with elevated roles. These are often the records that create confusion during audits or access reviews.

Look at three pieces of information together whenever possible:

- **Role**
- **Status**
- Recent activity details such as **Last Login** or **Updated**

For example, a user with a high-level role and no recent activity may need review. A user marked active but tied to an outdated department or job title may also need correction. Checking these details together gives you a clearer picture than reviewing any one field alone.

When employees move to a new team, change responsibilities, go on temporary assignment, or leave the organization, update their existing account promptly. That usually means changing role assignments, adjusting profile details, or switching the account to an inactive state when access should no longer continue. Avoid leaving old roles in place “just in case,” because the account list should reflect current reality, not historical convenience.

During periodic audits, review these fields on each account:

Field area	Why it matters
Contact details	Confirms the record still belongs to the right person
Role assignments	Ensures access matches current responsibilities
Account status	Shows whether sign-in should be allowed
Recent activity details	Helps identify stale or unused accounts

Regular maintenance makes later troubleshooting much easier and keeps the admin area aligned with who should actually be working in it.

Fixing common problems when maintaining user accounts

Most user maintenance issues in Sherkety ERP & Website Platform come down to list filters, missing required information, or access changes that were not fully confirmed after saving. When something looks wrong, start with the visible controls on the page before assuming the account itself is missing or broken.

If a user does not appear in the account list, first check the list controls. A leftover search term may be hiding the record, or a **Status** or **Role** filter may be limiting the results. If the list uses multiple pages, move through the pagination controls to make sure the account is not simply on another page. Clearing filters and re-running the search by **Name** or **Email** usually resolves this quickly.

If changes cannot be saved, review the form for highlighted fields or validation messages. The most common causes are:

- A required field was left blank
- The **Email** or **Username** is already used by another account
- Your own admin access does not allow that type of change

When a user still has the wrong access after an update, reopen the record and confirm the new role is actually shown on the saved account. If the page includes a permission summary, review that as well. In some cases, the user may need to sign out and sign back in before the new access appears in their session.

If access history or audit details look outdated, refresh the page and check again. Some activity details may not update instantly on screen. Also confirm that you are looking at the correct user record and not a similarly named account.

[SCREENSHOT: Validation message on the user form and filtered user list controls]

For broader guidance on access visibility after role changes, continue with Understanding Role Visibility and Access Restrictions.

Overview

This document focuses on the **Users** page in Sherkety ERP & Website Platform and the everyday tasks administrators perform there. The page is used to review the account list, open individual user records, update profile details, and confirm that each person has the correct level of access to the admin area.

The most important workflow begins with the account list. From there, you search for a user, review visible columns such as **Name**, **Email**, **Role**, and **Status**, and then open the record for closer inspection. Once inside the user record, you check identity details, account status, organizational information, and recent activity indicators before making any changes.

This guide also covers the maintenance side of user administration. That includes correcting names and contact details, updating department or team information, adjusting role assignments, and reviewing whether an account should remain active.

These tasks are part of keeping the admin area accurate over time, especially when people change responsibilities or no longer need access.

You should use this guide when you need to:

- Find an existing user account
- Review a person's current profile and status
- Update account details without creating a duplicate user
- Change role assignments or access status
- Investigate common issues such as missing users or unsaved changes

If you are looking for a broader introduction to the admin area, start with Using the Admin Dashboard for Navigation and Managing Users and Role Based Access. If your main task is understanding why users can or cannot see certain admin pages after a role change, the next document in this series is Understanding Role Visibility and Access Restrictions.

Prerequisites

Before you maintain user accounts in Sherkety ERP & Website Platform, make sure you can access the admin area and that your own account includes permission to open the **Users** page. If the page is not visible in the admin navigation, your current role may not allow user administration tasks.

You should have the following in place before starting:

- You can sign in to the admin portal successfully
- You can open the **Dashboard** and navigate to **Users**
- You know the person's current identifying details, such as their **Name** or **Email**
- You understand whether you are updating profile information, changing access, or reviewing account activity

It also helps to gather the correct replacement details before editing a record. For example, if you are updating a user after an internal move, confirm the new **Department**, **Job Title**, or role assignment first so you do not need to reopen the record multiple times.

Use this guide most effectively when you are working with an existing account rather than creating a brand-new one. The instructions here assume the user already appears in the account list and needs review or maintenance. If you cannot find the account, begin with the troubleshooting section in this document and check for active filters, search terms, or pagination.

Helpful background reading:

- Signing In and Accessing the Admin Portal
- Using the Admin Dashboard for Navigation
- Managing Users and Role Based Access

After you are comfortable opening and maintaining user records, continue to Understanding Role Visibility and Access Restrictions to learn how role changes affect what users can actually see and do.