



OptimMerchandising – User Heirarchy

[User Hierarchy](#)

Unlike the Manager role which has access to all areas on the platform, the Supervisor role can access only the data associated with the users assigned to him/her.

Below table summarizes the access of each role on the platform:

Role	Settings	Reports	Visits / Calendar	Profile	Announcement
Manager	✓	✓	✓	✓	✓
Supervisor	Limited	Limited	Limited	✓	✓
Client	✗	Limited	Limited	✓	✓
Merchandiser	✗	✗	✗	✓	✓
Promoter	✗	✗	✗	✓	✓



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How to Add a Supervisor

1. Go to app.optimmerchandising.com and login with the Manager credentials.
2. In Settings > Manage Users > Users > Add User

The screenshot shows the 'powata' user management interface. The left sidebar contains the following menu items: Company Settings, Manage Users, Users (highlighted), Clients, Assign Supervisor, Location Settings, and Product Settings. The main content area is titled 'Users' and includes a search bar, a 'Display 10 records' dropdown, and two buttons: 'Invite user' and 'Add User'. A red arrow points to the 'Add User' button with the number '2'. Below the buttons is a table with the following data:

Name	Email	Roles	Actions
Tim Powata	manager@powata.com	Manager	
First Merchandiser	appuser@powata.com	Merchandiser	



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- 3. Fill in the form and turn on the toggle for Supervisor under Assign Roles.
- 4. Click on Submit.

Add User

First Name

User Email

Mapping Name

Department

Last Name

Password

Mapping Code

Sales Email Notification Recipients (Separated by comma if multiple)

Assign Roles

Manager <input type="checkbox"/>	Merchandiser <input type="checkbox"/>	Client <input type="checkbox"/>	Promoter <input type="checkbox"/>
Supervisor <input checked="" type="checkbox"/>			



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How to Assign Users to a Supervisor

1. In Settings > Manage Users > Assign Supervisor > Assign User

The screenshot displays the 'Assign Supervisor' page in the Powata application. The sidebar on the left contains the following menu items: Company Settings, Manage Users, Users, Clients, Assign Supervisor (highlighted), Location Settings, and Product Settings. The main content area is titled 'Assign Supervisor' and includes a 'Supervisor' dropdown menu, a 'Filter' button, and a search box. An orange 'Assign User' button is prominently displayed on the right, with a red arrow and the number '1' pointing to it. Below these elements is a table with two columns: 'Name' and 'Assigned Users'.

Name	Assigned Users
First Supervisor	First Merchandiser, First Promoter
Second Supervisor	Second Merchandiser, Second Promoter



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2. Select the Supervisor from the drop-down list.
3. On the left column, tick the boxes before the Merchandisers / Promoters to be assigned.
4. Click on Add to transfer them to the right column.
5. Click on Submit.

Add Assign Supervisor

Supervisor *

Select Supervisor

- First Supervisor
- Second Supervisor

Search...

Users To Select	Columns
<input type="checkbox"/> First Supervisor	
<input type="checkbox"/> Fourth Merchandiser	
<input checked="" type="checkbox"/> Second Merchandiser	
<input checked="" type="checkbox"/> Second Promoter	
<input type="checkbox"/> Second Supervisor	
<input type="checkbox"/> Test Apple Powata	
<input type="checkbox"/> Test Apple Powata	
<input type="checkbox"/> Third Merchandiser	
<input type="checkbox"/> Third Promoter	

Search...

Users Selected	Columns
<input type="checkbox"/> First Merchandiser	
<input type="checkbox"/> First Promoter	

3 **4** **2**

Add >>

<< Remove



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View the List of Assignments

In the Assign Supervisor tab, you will see the list of assignments – the Merchandisers and Promoters assigned to each Supervisor. Also, you can remove an assignment by clicking on the trash can button at the right side of the table.

The screenshot displays the 'Assign Supervisor' interface in the Powata system. The sidebar on the left contains the following menu items: Company Settings, Manage Users, Users, Clients, Assign Supervisor (highlighted), Location Settings, and Product Settings. The main content area features a search bar, a 'Supervisor' dropdown menu, a 'Filter' button, and an 'Assign User' button. Below these elements is a table with the following data:

Name	Assigned Users	
First Supervisor	First Merchandiser, First Promoter	
Second Supervisor	Second Merchandiser, Second Promoter	



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How to Modify or Remove an Assignment

Similar to assigning users to a supervisor, the following should be performed to modify or remove an assignment:

1. In Settings > Manage Users > Assign Supervisor > Assign User

The screenshot displays the 'Assign Supervisor' page in the Powata application. The sidebar on the left contains the following menu items: Company Settings, Manage Users, Users, Clients, Assign Supervisor (highlighted), Location Settings, and Product Settings. The main content area is titled 'Assign Supervisor' and includes a 'Supervisor' dropdown menu, a 'Filter' button, and a 'Search..' input field. An orange 'Assign User' button is prominently displayed on the right, with a red arrow and the number '1' pointing to it. Below these elements is a table with two columns: 'Name' and 'Assigned Users'. The table contains two rows of data, each with a red trash icon in the rightmost column.

Name	Assigned Users	
First Supervisor	First Merchandiser, First Promoter	
Second Supervisor	Second Merchandiser, Second Promoter	



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2. Select the Supervisor from the drop-down list.
3. On the right column, tick the boxes before the Merchandisers / Promoters to be removed.
4. Click on Remove to transfer them back to the left column.
5. Click on Submit.

Add Assign Supervisor

Supervisor *

Select Supervisor

- First Supervisor
- Second Supervisor

Search...

Users To Select	Columns
<input type="checkbox"/> abdu adidas	
<input type="checkbox"/> admin Valentinmerch@powata.com	
<input type="checkbox"/> admin Valentinmerch@powata.com	
<input type="checkbox"/> AdrianCosmetics Test	
<input type="checkbox"/> AdrianCosmetics Test	
<input type="checkbox"/> AdrianGmail Client	
<input type="checkbox"/> AdrianGmail Client	
<input type="checkbox"/> AdrianGmail Client	
<input type="checkbox"/> CobaAsd Asd	

Add >>

<< Remove

Search...

Users Selected	Columns
<input checked="" type="checkbox"/> First Promoter	
<input checked="" type="checkbox"/> Merchandiser 1 Powata	
<input type="checkbox"/> Merchandiser 2 Powata	