



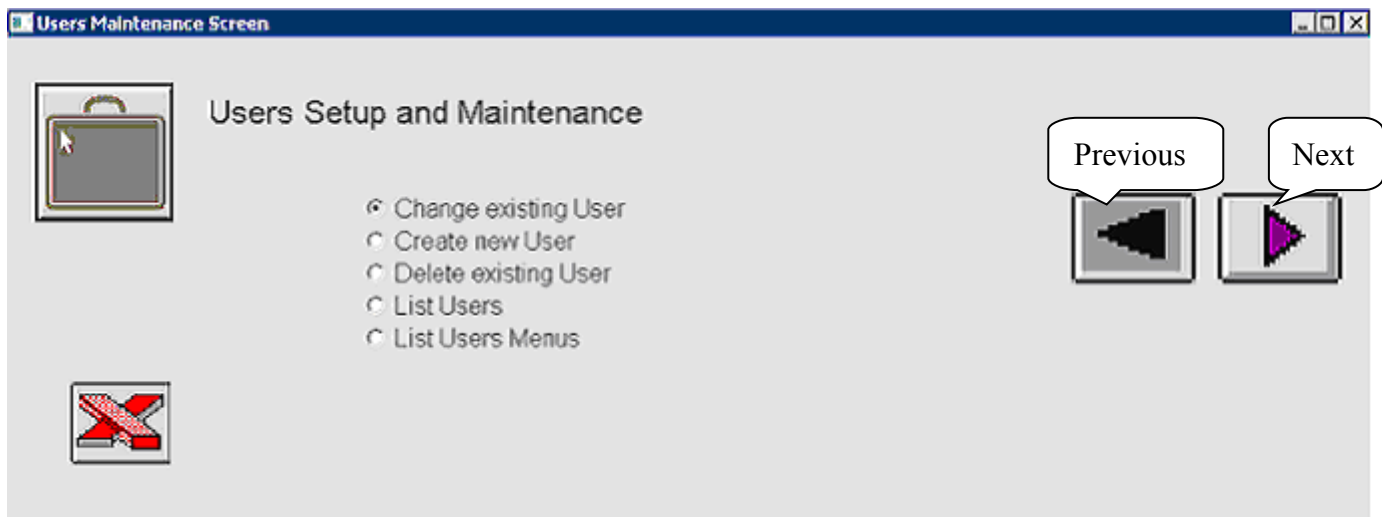
CSB Management

DISCUSSION DOCUMENT – USER SETUPS

To change the user set up go to **Utilities, Setup, User Setup**

On the First page select one of the following Options and click on the next button as shown below

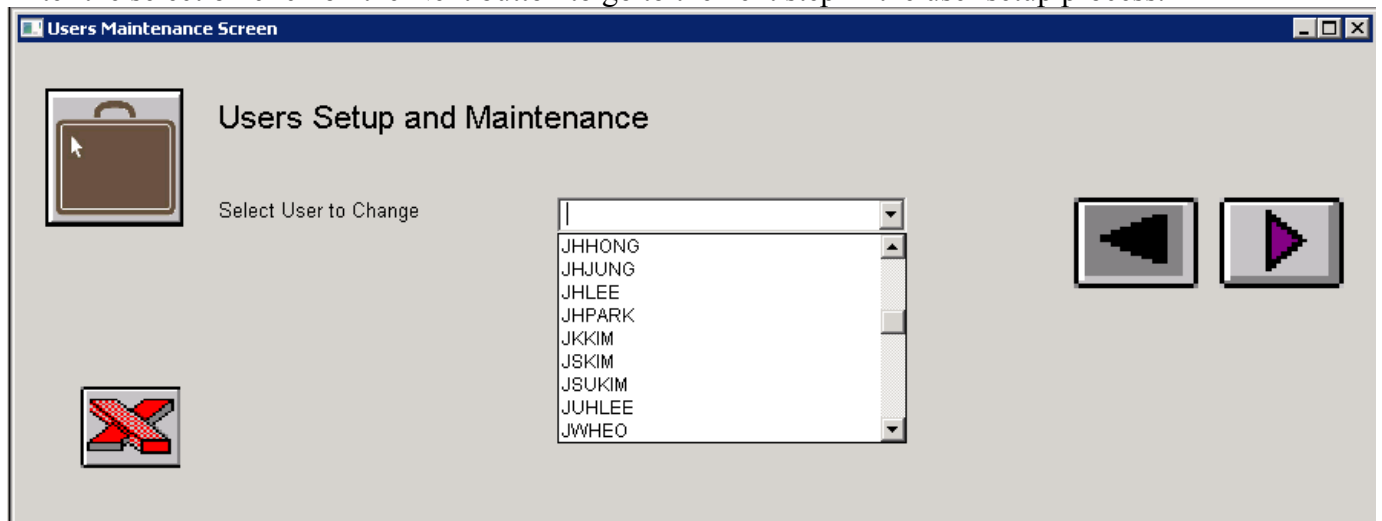
1. Change Existing User – To Modify Right/Setup of Existing Users in the system
2. Create New User – Add a new User to the System
3. Delete Existing User – Remove an Existing User from the System
4. List Users – Will product a Print preview of the List of current users in the system
5. List User Menus – Will open up a new form where the user can review the Menu Rights of an Existing User in the system



On the next Screen

1. Select an existing username from the dropdown list in case you need to modify the settings
2. Enter a new user name in case you need to create a new user in the system

After the selection click on the Next button to go to the next step in the user setup process.



On the screen the user can setup/modify the following details for the selected user



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1. User Type – It can be either User, Administrator or a System Administrator
2. Confirm Log Off – If you need the system to confirm log off from csoft system when the user closes it.
3. Password – Setup/modify Password for the user. If you do not wish to setup the user with please select the “No Password” option
4. Continue to the next step using the next button. If you modify the password the system will confirm the new password before allowing the user to continue to the next page

The screenshot shows a window titled "Users Maintenance Screen" with a sub-header "Users Setup and Maintenance". On the left is a briefcase icon. The form contains the following fields and options:

- User Type: User, Administrator, System Administrator
- Confirm Logoff: Confirm Logoff, Don't Confirm Logoff
- No Password: No Password, Add -Change Password, Dont Change Password
- Password: A text input field with asterisks.

Navigation buttons: A left arrow button and a right arrow button. A red 'X' icon is at the bottom left.

On this page the user can setup the following options for an Existing or a new user setup

1. Default Export Directory – The default directory to export the reports to
2. Default Menu – The default menu that should open up when the user logs into the system.
3. Users Email Address – Email address of the user
4. IP Address – IP address of the server if the system is used on Terminal Services
5. Import/Export Sync

After the setup is done click on the Next Button to go to the next page.

The screenshot shows the same "Users Maintenance Screen" window, but with the following input fields filled:

- Default Export Directory: c:\temp
- Default Menu: (empty)
- Users Email Address: gerry@csoftbsl.com
- IP Address: (empty)
- Import/Export Sync: (empty)

The navigation buttons and the red 'X' icon are also present.



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On this page the user can setup the following options

1. Don't allow Change of Message board -
2. Don't allow Floating toolbar – Tick this If you don't want to allow the user to use a floating toolbar in the system
3. Don't Allow Command - Tick this check box if you want the user to have access to the F5 command line in the system
4. Don't Allow Export Cust/Cred/Crm – This will prevent the user from exporting the customers, creditors and CRM reports to file. They can only print the reports to screen or printer
5. Allow Utilities – Tick this check box if you want the user to have access to the setup menus utilities menu in the system to run the upgrades
6. Use Exclusive help for this user – Will allow the user to create their own system help using the F1 key
7. Crm - All options – Will Allow the user to see all the customer contacts in the system
 - My Customers Only – Will only allow the user to see the customer contacts allocated to the user
 - All Branch Customers - Will only allow the user to see the customer contacts allocated to the branch

After the setup is done click on the Next Button to go to the next page

The screenshot shows a window titled "Users Maintenance Screen" with a sub-header "Users Setup and Maintenance". On the left is a briefcase icon. Below it is a red 'X' icon. The main area contains two columns of checkboxes and radio buttons. The first column has four checked checkboxes: "Don't Allow Change of Message Board", "Don't Allow Floating Toolbar", "Don't Allow Command", and "Don't Allow Export Cust/Cred/Crm". The second column has one checked checkbox: "Allow Utilities", and three radio buttons: "Crm - ALL Options", "Crm - My Customers only", and "Crm - All Branch Customers" (which is selected). To the right of these options are two navigation buttons: a left-pointing arrow and a right-pointing arrow.



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On this page the user can specify if the user is allowed to delete records from the system. The user can be allowed to delete records from all tables (by ticking against the first line “All Tables” in the Edit table) or alternatively it can also be setup to allow them to delete records from selected files only.

After the setup is done click on the Next Button to go to the next page

Users Setup and Maintenance

Allow Record Deletes (F7)

	Allow the following Tables	Select
1	All Tables	<input type="checkbox"/> Allow
2	Customers	<input type="checkbox"/> Allow
3	Creditors	<input type="checkbox"/> Allow
4	Products	<input type="checkbox"/> Allow
5	Chart of Accounts	<input type="checkbox"/> Allow
6	Deposits	<input checked="" type="checkbox"/> Allow
7	Payments	<input type="checkbox"/> Allow
8	Cancelled Payments	<input type="checkbox"/> Allow
9	Journals	<input checked="" type="checkbox"/> Allow
10	Invoices	<input type="checkbox"/> Allow

Navigation buttons: Previous (left arrow) and Next (right arrow)



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The user can setup the Entry limits that the users are allowed to Enter in the system for Deposits, Payments, etc. For E.g. if the user is setup with a Limit of \$100 for Payments the system will only allow the user to Enter payments to a maximum of \$100 per payment transaction

After the setup is done click on the Next Button to go to the next page

Users Setup and Maintenance

User Limits
(May be left blank)

	Table	EntryLimit	AuthLimit
1	DEPOSITS	None	None
2	PAYMENTS	None	None
3	INVOICES	None	None
4	CRED_INV	None	None
5	JOURNALS	None	None
6	PURCHASES	None	None
7	ORDERS	None	None

After the setup is done click on the Next Button to go to the next page.

On this page there are 2 options as explained in option 1 and 2 below

1. Individual Menu – If this option is used then the user will have their own menu setup and any future changes to the rights will need to be done by modifying the user setup individually.

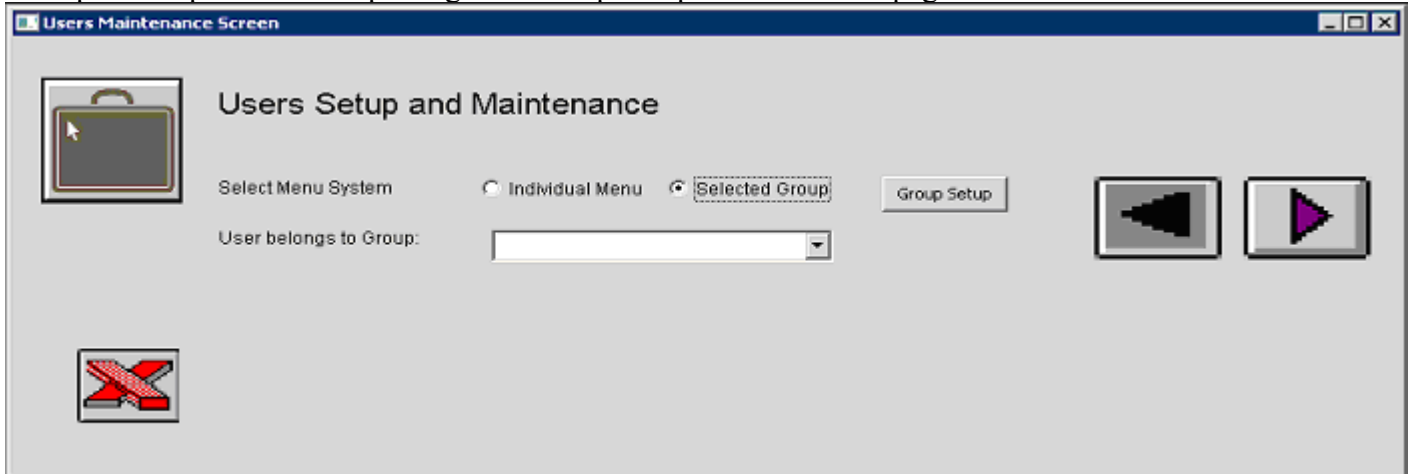
Users Setup and Maintenance

Select Menu System Individual Menu Selected Group



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2. Selected Group – Is this option is selected then this user can be allocated a predefined group of Menu Rights that can be used for other users as well. For eg. A group called SALES can be created in the system and all the users in the SALES Dept can then be allocated to this group. In future of there is any changes to the menu rights for the group then the user just need to change the rights in the SALES group and the changes will by automatically applied to all the users under that group. Multiple Groups can be setup using the “Group Setup” button on the page

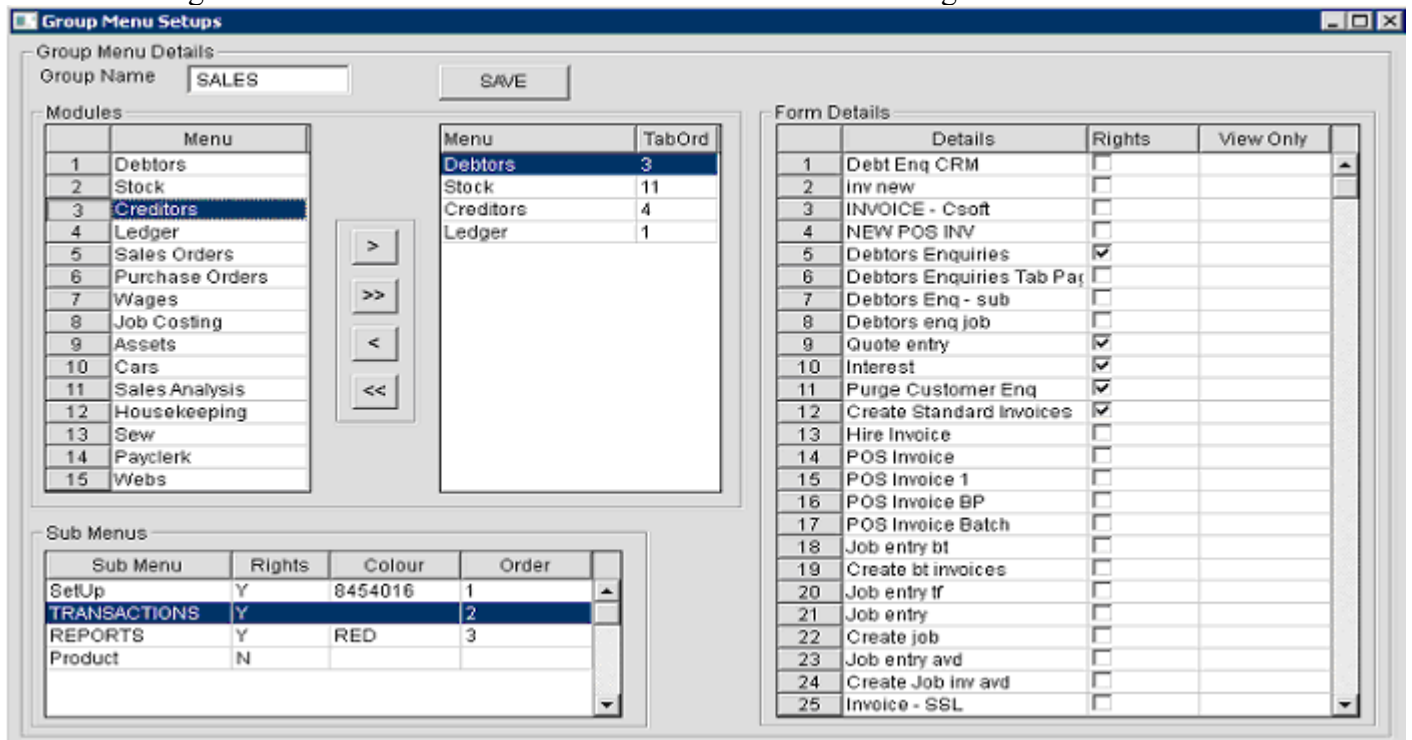


Group Setup Entry screen

To use this screen type in the Group name and then click on the desired module under the Modules section and then click on the Menus available under the selected module.

Within the menus then select the desired submenu line and assign rights by typing in Y under the Rights column. Then assign rights to the individual screens by clicking on the check box against the individual forms under the ‘Form Details’

Once the changes are finished click on the SAVE button to save the changes





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After setting up the group the user can select and apply the group to the user setup using the dropdown list as shown below

The screenshot shows a window titled "Users Maintenance Screen" with a sub-header "Users Setup and Maintenance". On the left is a briefcase icon. The form includes a "Select Menu System" section with radio buttons for "Individual Menu" and "Selected Group" (which is selected). A "Group Setup" button is to the right. Below this is a "User belongs to Group:" label and a dropdown menu with "NEW" and "SALES" options. On the right side of the form are two navigation buttons: a left-pointing arrow and a right-pointing arrow. At the bottom left is a red 'X' icon.



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Users Maintenance Screen

Users Setup and Maintenance

	MENU	RIGHTS	TabOrd
1	Debtors	Y	3
2	Stock	Y	11
3	Creditors	Y	4
4	Ledger	Y	1
5	Sales Orders	N	8
6	Purchase Orders	N	9
7	Point of Sale	N	
8	Wages	N	13
9	Job Costing	N	12
10	Assets	N	7

Users Maintenance Screen

Users Setup and Maintenance

1. Read point 1 below

	MENU	RIGHTS	TabOrd
1	Debtors	Y	3
2	Stock	Y	11
3	Creditors	Y	4
4	Ledger	Y	1
5	Sales Orders	N	8
6	Purchase Orders	N	9
7	Point of Sale	N	
8	Wages	N	13
9	Job Costing	N	12
10	Assets	N	7

2. Read point 2 below

CR*GERRY*Sub Menus

	MENU DETAILS	RIGHTS	Colour	Order
1	Setup	Y		
2	Transactions	Y		
3	Reports	Y		
4	Payments	Y		

3. Read point 3 below

CR*GERRY*Transactions

	DETAILS	RIGHTS	ViewOnly
1	Creditors Enquiries		
2	COA Report	1	
3	Invoices/Credits	1	
4	Invoices/Credits Exch	0	
5	Invoices/Products	0	
6	Invoices retention	0	
7	Hold Invoices	0	
8	Offset Inv/Credits	0	
9	List Unprinted/Unposted	1	
10	Post Cred Inv(Batch)	0	

1. Activate the menu by using 'Y' under the Rights column and Double click on the Menu item to open the Sub Menu Screen. The user can also setup the sequence of the Modules in the menu by typing in the desired sequence number under the TabOrd column
2. Use 'Y'=On or 'N'-Off under the Rights column and Double click on the Menu Details. The user can also setup the background colors

The options available for the colors are as follow:



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BLACK, WHITE, GRAY, DKGRAY, RED, GREEN, BLUE, CYAN, MAGENTA, YELLOW, DKRED, DKGREEN, DKBLUE, DKCYAN, DKMAGENTA, DKYELLOW
The user can also setup the tab sequence of the items in the menu by typing in the desired sequence number under the Order column

3. On this screen select rights 1=On and 0=Off. The user can also allow view only access to the screen by using 'Y' under View only column

After the Setup is done click on the Next button to go to the next page

On this page select the desired option to save or discard the changes and click on the next button

