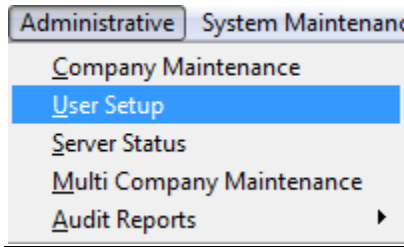



## User Setup

User Setup allows you to create different logins for everyone who will be allowed to use the system. This is recommended so you will be able to see who did a specific thing in the audit trail. Each login is unique and you can give each login access to only the options they need to use to perform their job.



## General Tab

User Maintenance "Developer version - Not for resale"

User ID   User Name

**General** | Security | Menu | Online Ordering | Short Cuts

User's Password

User's e-mail

Type of User

Company Selection

Sel	Code	Name
<input checked="" type="checkbox"/>	01	SR2SOFTWARE, INC.

Copy From User

**User ID:** Enter in the User's ID. You can enter in up to 30 alphanumeric characters. This is what they will use as their login. It is case sensitive.

**User Name:** Enter in the User's Name. You can enter in up to 30 alphanumeric characters.

**User's Password:** Enter in the User's Password. You can enter in up to 20 alphanumeric characters. It is case sensitive.

**User's e-mail:** Enter in the User's e-mail address for e-mail returns. It is also used for e-mailing Sales Order Invoices and Purchase Orders.

**Type of user:** Choose SR2 or ONLINE.

**Company Selection:** Place an **X** next to each company this user is to have access to.

**Copy From User:** When creating a new user this option will allow you to copy from another user already created.

## Security Tab

The screenshot shows the 'User Maintenance' window with the 'Security' tab selected. The 'User ID' is 'missy' and the 'User Name' is 'Melissa McCulloch'. The 'Security' tab is highlighted with a red border. Below the tabs, there is a list of security options with checkboxes:

Option	Checked
Hide Cost in Sales Order Entry From User	<input type="checkbox"/>
Allow User To Delete Sales Orders	<input checked="" type="checkbox"/>
Allow User To Print Invoices	<input checked="" type="checkbox"/>
Allow User To Delete Purchase Orders	<input checked="" type="checkbox"/>
Allow User To Update Purchase Orders	<input checked="" type="checkbox"/>
Hide Open Order Totals on Menu From User	<input type="checkbox"/>
Allow User To Enter Cash Receipts	<input type="checkbox"/>
Allow User To Write Item Changes	<input checked="" type="checkbox"/>
Allow User To Write Customer Changes	<input checked="" type="checkbox"/>
Allow User To Change Order after Invoice Printed	<input checked="" type="checkbox"/>
Prevent User From Changing a Price in Sales Order	<input type="checkbox"/>
Allow User To Enter a Desired GP% in Sales Order	<input type="checkbox"/>

At the bottom of the window, there are navigation buttons (back, forward, search, etc.) and action buttons: 'Write', 'Delete', 'Clear', and 'Cancel'.

Click on the corresponding checkboxes if you would like to:

**Hide Cost in Sales Order Entry From User:** The user will not be able to see the cost of the item.

**Allow User To Delete Sales Order:** The user will be able to delete open sales orders.

**Allow User To Print Invoices:** The user will be able to print the sales invoices.

**Allow User To Delete Purchase Orders:** The user will be able to delete open purchase orders.

**Allow User To Update Purchase Orders:** The user will be able to click the Update button on open purchase orders which will then send the order to Quickbooks®.

**Hide Open Order Totals on Menu From User:** The user will not be able to see the invoice total of the open orders on the home screen.

**Allow User to Enter Cash Receipts:** Will allow the user to automatically do cash receipts directly after invoicing the order.

**Allow User To Write Item Changes:** The user will be able to create and make updates to the items.

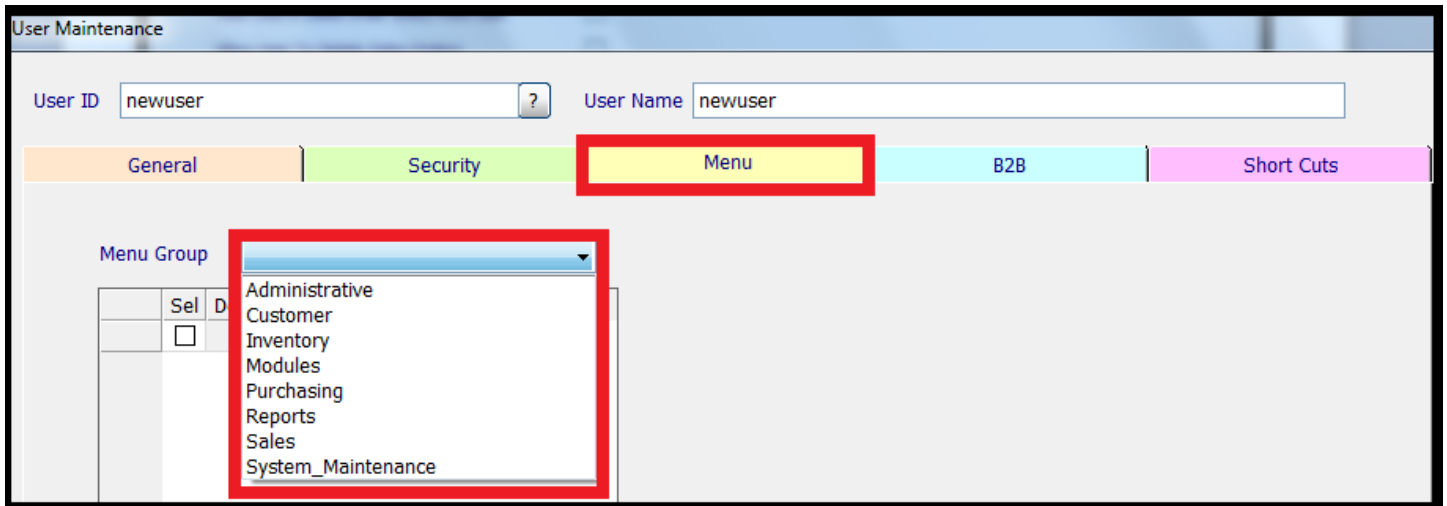
**Allow User To Write Customer Changes:** The user will be able to create and make updates to the customers.

**Allow User To Change order after Invoice Printed:** The user will be able to make changes to a sales order after the invoice has been printed for that sales order.

**Prevent User From Changing a Price in Sales Order:** The user will not be able to change the price for an item in sales order entry.

**Allow User To Enter a Desired GP% in Sales Order:** The user will be able to enter a GP% for an item on a sales order and it will automatically calculate the price for the item.

## Menu Tab

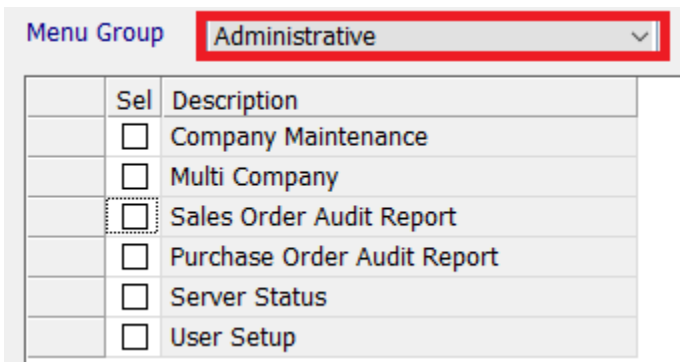


The screenshot shows the 'User Maintenance' window. At the top, there are input fields for 'User ID' (containing 'newuser') and 'User Name' (containing 'newuser'). Below these are five tabs: 'General' (orange), 'Security' (green), 'Menu' (yellow, highlighted with a red box), 'B2B' (cyan), and 'Short Cuts' (pink). Under the 'Menu' tab, there is a 'Menu Group' dropdown menu (highlighted with a red box) showing a list of options: Administrative, Customer, Inventory, Modules, Purchasing, Reports, Sales, and System\_Maintenance. To the left of the dropdown is a table with columns 'Sel' and 'D'.

**Menu Group:** You can choose to setup specific securities from the different Menu Groups.

Click on the checkbox if you would like the user to have access to that option.

### Menu Group Administrative



This screenshot shows a close-up of the 'Menu Group' dropdown menu, which is set to 'Administrative' (highlighted with a red box). Below the dropdown is a table with the following structure:

	Sel	Description
	<input type="checkbox"/>	Company Maintenance
	<input type="checkbox"/>	Multi Company
	<input type="checkbox"/>	Sales Order Audit Report
	<input type="checkbox"/>	Purchase Order Audit Report
	<input type="checkbox"/>	Server Status
	<input type="checkbox"/>	User Setup

## Menu Group Customer

Menu Group Customer ▼

Sel	Description
<input type="checkbox"/>	Customer Item Price Lookup
<input type="checkbox"/>	Customer Item Price Override
<input type="checkbox"/>	Customer Label Print
<input type="checkbox"/>	Customer Entry
<input type="checkbox"/>	Statements

## Menu Group Inventory

Menu Group Inventory ▼

Sel	Description
<input type="checkbox"/>	Item Barcode Lookup
<input type="checkbox"/>	Fixed Pricing Entry
<input type="checkbox"/>	Foreign Language Item Entry
<input type="checkbox"/>	Inventory Transactions
<input type="checkbox"/>	Non-Lot Inventory Inquiry
<input type="checkbox"/>	Item Entry
<input type="checkbox"/>	Item Customer Price Override
<input type="checkbox"/>	Item Label Print
<input type="checkbox"/>	Item Price Level Lookup
<input type="checkbox"/>	Item Repack
<input type="checkbox"/>	Lot Transfer/Maintenance
<input type="checkbox"/>	Lot Inquiry
<input type="checkbox"/>	Physical Inventory
<input type="checkbox"/>	Physical Inventory Scanning
<input type="checkbox"/>	Future Price Increase by Cat.
<input type="checkbox"/>	Future Cost Entry

## Menu Group Modules

Menu Group Modules

Sel	Description
<input type="checkbox"/>	Future Cost Calculation
<input type="checkbox"/>	Production Additional Cost
<input type="checkbox"/>	Manufacturing Forecast Report
<input type="checkbox"/>	Processed Items Batch Pick
<input type="checkbox"/>	Processed Items Label Print
<input type="checkbox"/>	Processed Items Order Labels
<input type="checkbox"/>	Processed Items Batch PT Print
<input type="checkbox"/>	Production Labels
<input type="checkbox"/>	Recipe Orders
<input type="checkbox"/>	Open Recipe Report
<input type="checkbox"/>	Production Orders

## Menu Group Purchasing

Menu Group Purchasing

Sel	Description
<input type="checkbox"/>	Purchase Order Entry
<input type="checkbox"/>	Purchase Order History Lookup
<input type="checkbox"/>	PO Confirmation
<input type="checkbox"/>	Vendor Lookup

## Menu Group Reports

Menu Group **Reports**

Sel	Description
<input type="checkbox"/>	Customer A/R Aging Detail
<input type="checkbox"/>	Customer A/R Aging Summary
<input type="checkbox"/>	Purchase Forecast Report
<input type="checkbox"/>	Consolidate Company BuySheet
<input type="checkbox"/>	Customer Sales Comparison Rpt
<input type="checkbox"/>	Customer Item Summary Report
<input type="checkbox"/>	Customer Call Report
<input type="checkbox"/>	Category Purchases Report
<input type="checkbox"/>	Category Sales Report
<input type="checkbox"/>	Catalog Report
<input type="checkbox"/>	Credit History Report
<input type="checkbox"/>	Customer Last Sale Report
<input type="checkbox"/>	Customer Listing
<input type="checkbox"/>	Customer History Price Report
<input type="checkbox"/>	Dead Inventory Report
<input type="checkbox"/>	Item Customer Detail Report
<input type="checkbox"/>	Item Customer Summary Report

Menu Group **Reports**

Sel	Description
<input type="checkbox"/>	Item Vendor Detail Report
<input type="checkbox"/>	Item Vendor Summary Report
<input type="checkbox"/>	Customer History Payments
<input type="checkbox"/>	Inventory Transaction Report
<input type="checkbox"/>	Item Listing
<input type="checkbox"/>	Item Purchases Report
<input type="checkbox"/>	Item Sales Report
<input type="checkbox"/>	Item Vendor X-Reference
<input type="checkbox"/>	Lot Cost Report
<input type="checkbox"/>	Lot Costing Report By PO
<input type="checkbox"/>	Lot Report
<input type="checkbox"/>	Lot Tracking Program
<input type="checkbox"/>	Master Price List Report
<input type="checkbox"/>	Open Sales Order
<input type="checkbox"/>	Open Purchase Orders
<input type="checkbox"/>	Open Orders Gross Profit
<input type="checkbox"/>	Sales Order History Report

Menu Group

Reports

Sel	Description
<input type="checkbox"/>	Purchase Order History Report
<input type="checkbox"/>	Customer Price List Report
<input type="checkbox"/>	Price Level Price List by Item
<input type="checkbox"/>	Price List by Customer
<input type="checkbox"/>	Price Level List w/GP% By Cat
<input type="checkbox"/>	Price Level List w/GP% By Item
<input type="checkbox"/>	Price Level List Report
<input type="checkbox"/>	Customer Special Price List
<input type="checkbox"/>	Inventory Re-Order Report
<input type="checkbox"/>	SalesPerson Summary Report
<input type="checkbox"/>	Sales History Buy Sheet
<input type="checkbox"/>	Customer Gross Profit Report
<input type="checkbox"/>	Customer Sales Report
<input type="checkbox"/>	Short Ship Report
<input type="checkbox"/>	Special Price List by Customer
<input type="checkbox"/>	Special Price List by ID
<input type="checkbox"/>	Stock Status Report

<input type="checkbox"/>	Customer Truck Routes
<input type="checkbox"/>	Inventory Valuation Report
<input type="checkbox"/>	Vendor Guide Report
<input type="checkbox"/>	Warehouse Stock Status Report
<input type="checkbox"/>	Warehouse Inventory Valuation

## Menu Group Sales

Menu Group		Sales
Sel	Description	
<input type="checkbox"/>	Batch Invoice Orders	
<input type="checkbox"/>	Batch Pick	
<input type="checkbox"/>	Buy Sheet	
<input type="checkbox"/>	Catchweight Hold Release	
<input type="checkbox"/>	Cash Receipts	
<input type="checkbox"/>	Credit Hold Release	
<input type="checkbox"/>	Invoice Register (End of Day)	
<input type="checkbox"/>	Batch Invoice Print	
<input type="checkbox"/>	Truck Manifest Report	
<input type="checkbox"/>	Order Confirmation	
<input type="checkbox"/>	Order Label Print	
<input type="checkbox"/>	Batch Pick Ticket Print	
<input type="checkbox"/>	Payment Register	
<input type="checkbox"/>	Truck Routing	
<input type="checkbox"/>	Route Order Confirmation	
<input type="checkbox"/>	Sales Order Entry	
<input type="checkbox"/>	Sales Order History Lookup	

## Menu Group System Maintenance

Menu Group		System Maintenance
Sel	Description	
<input type="checkbox"/>	Barcode	
<input type="checkbox"/>	Category	
<input type="checkbox"/>	Class Lookup	
<input type="checkbox"/>	Country	
<input type="checkbox"/>	Credit Reason	
<input type="checkbox"/>	Customer Type	
<input type="checkbox"/>	Email Text Maintenance	
<input type="checkbox"/>	Equipment Maintenance	
<input type="checkbox"/>	Foreign Language	
<input type="checkbox"/>	Fuel Zone	
<input type="checkbox"/>	Item Tax Lookup	
<input type="checkbox"/>	Locations	
<input type="checkbox"/>	Payment Method Lookup	
<input type="checkbox"/>	Price Level	
<input type="checkbox"/>	Truck Routes	
<input type="checkbox"/>	Sales Tax Lookup	
<input type="checkbox"/>	Ship Via	



<input type="checkbox"/>	Special Price Lists
<input type="checkbox"/>	Standard Notes
<input type="checkbox"/>	Unit of Measure
<input type="checkbox"/>	Warehouse

## Online Tab

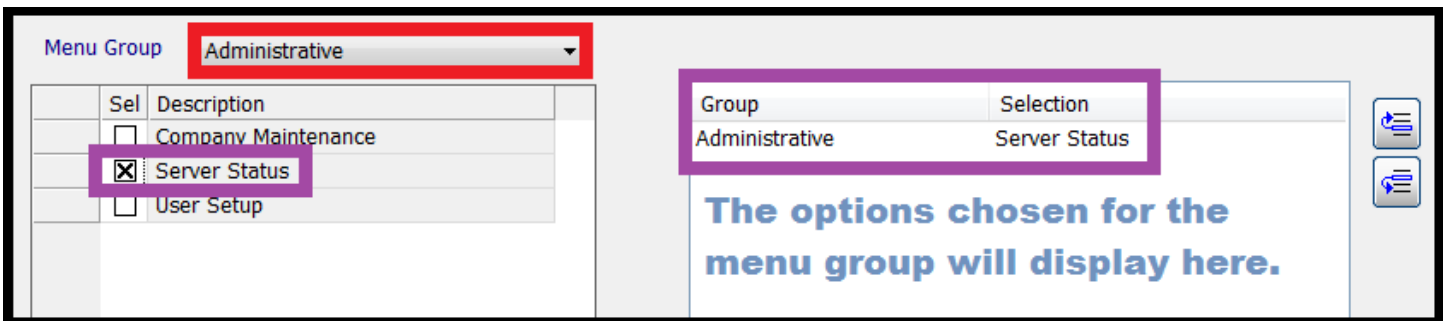
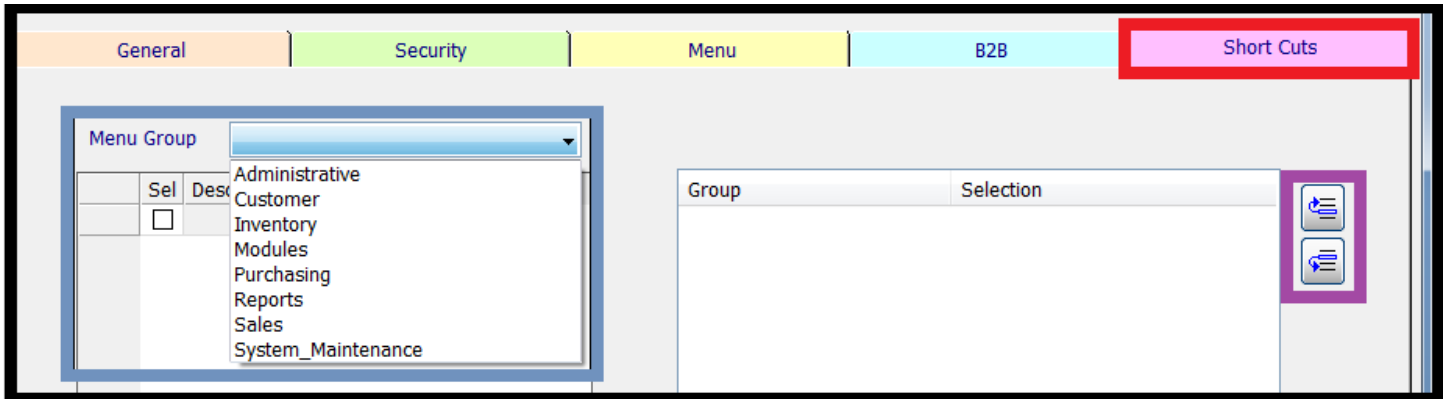
This Tab is for customers who purchase the eCommerce Module.

General		Security	Menu	Online Ordering	Short Cuts
Customer Assignment					
<input type="checkbox"/>	Cust ID	Customer Name	Allow Online A/R Display Access	<input checked="" type="checkbox"/>	
<input type="checkbox"/>			Allow Online Order History Access	<input checked="" type="checkbox"/>	
<input type="checkbox"/>			Allow Online Order Entry Access	<input checked="" type="checkbox"/>	
<input type="checkbox"/>			Hide Prices in Online Order Entry	<input type="checkbox"/>	

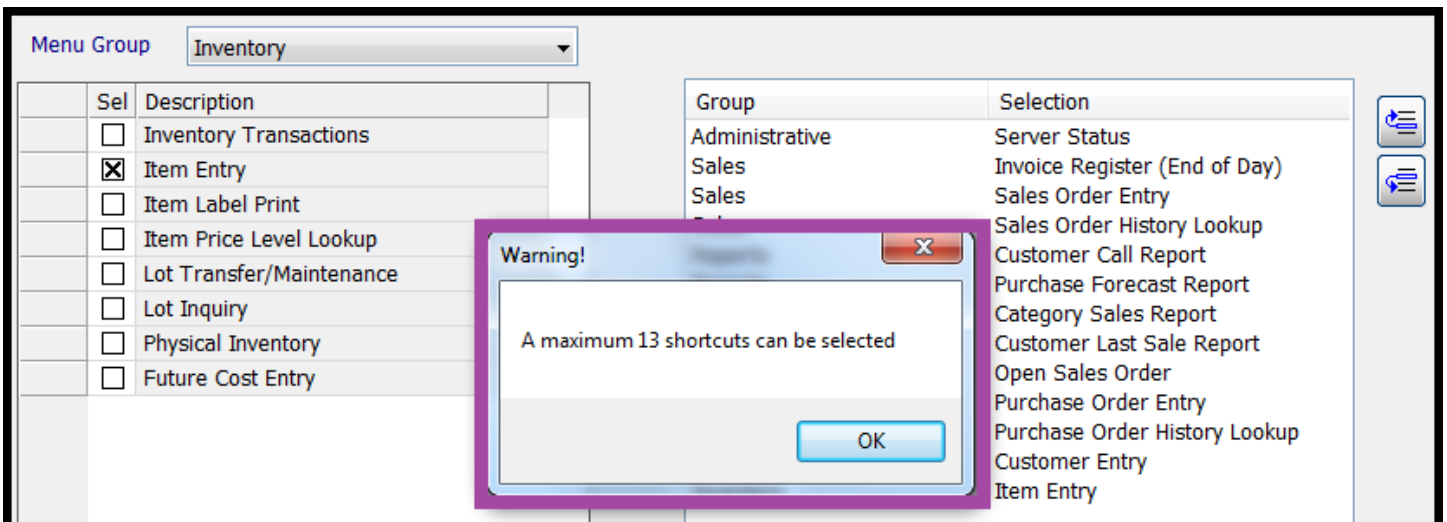
## Shortcuts Tab

You have the ability to customize up to 13 buttons that will appear on the specific user's main page at the top of the screen. These buttons, or Shortcuts, will allow users to go directly to a menu selection without navigating to the main menu group and choosing the selection.

Choose the Menu Group to create Shortcut Buttons.




If you choose more than the 13 allowable shortcuts a warning message will appear on the screen:



After you select the Shortcut buttons for the user, you can “move” them using the buttons on the right hand side of the screen to place them in the order the user would like them to display on the main screen. Click on the

item you want to move to highlight it and then click the up or down button on the right to move it to the correct location. The top of the list represents the far left of the shortcut bar.

Group	Selection
Administrative	Server Status
Sales	Sales Order Entry
Sales	Invoice Register (End of Day)
Sales	Sales Order History Lookup



For example, if our list looks as the one below, the shortcuts will appear as the one below:

Group	Selection
Administrative	Server Status
Customer	Customer Entry
Inventory	Item Entry
Sales	Sales Order Entry
Purchasing	Purchase Order Entry
Sales	Buysheet
Reports	Inventory Re-Order Report
Reports	Open Sales Order
Sales	Invoice Register (End of Day)
Reports	Open Purchase Orders
Reports	Purchase Forecast Report
Reports	Customer Last Sale Report

