SedonaSetup - OP - Users

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Setting up a Users is a two-step process. First you will create the User record, and then you will assign the User to one or more User Groups.

The User Group will determine which modules and which functions within each module to which the User will have access. Anyone you wish to give access to SedonaOffice must be setup as a User.

The password entered for each user is encrypted; if a user forgets their password, the company's system administrator will need to change or re-enter and save the password here in SedonaSetup.

Users must also be setup in the Employees setup table to be able to login to the SedonaOffice application. Once a User record has been created, you will navigate to the Employee setup table and link the Employee record to the User record.

When creating a User, if the User will be allowed to create new Users, select the Create Other Users checkbox.

If Customer Group Security has been activated in Setup Processing for Accounts Receivable refer to the information below for additional setup instructions.

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Users - Customer Group Security

If your company has opted to activate Customer Group Security, a second tab, Customer Groups, is displayed to the right of the User Groups tab in the data entry area of the User setup form.

Check the box to the left of each Customer Group for each group that the User should have access. If no Customer Groups are selected, the User will not be able to work with any customer records in the database.

You also have the ability to make a Customer Group to which a User has been granted permission to be set as Ready Only; the User will be able to view the customer information but will not be able to make any changes to the data.

To activate the Read Only function of a Customer Group, highlight the Customer Group, right-click and select the Read Only option. Click the Apply button to save your changes.

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