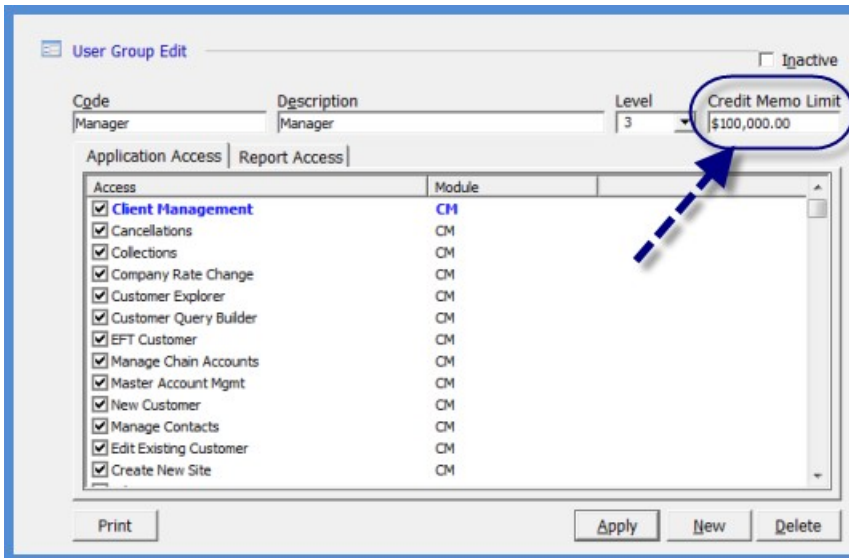


User Group Setup

Last Modified on 01/09/2023 4:56 pm EST

For each User involved in the Credit Request process that will be able to sign-off the Credit Request, the User must be assigned to a User Group with a *Credit Memo Limit* set up and User Group security privileges that will allow the User access to the various functions of the Credit Request process. For more information on the User Group security privileges related to Credit Request Users, refer to [Credit Requests – User Group Security](#).

For each User Group you may set a Credit Memo Limit amount. A User assigned to the group with a Credit Memo Limit amount will only be able to approve a Credit Request up to a total amount of the limit amount assigned to their User Group. You may have Users that you want to grant the permission to create Credit Requests, but not be able to sign-off on any amount requested. For these types of Users, their Credit Memo Limit would be set to zero.



The screenshot shows the 'User Group Edit' window. At the top right, there is an 'Inactive' checkbox. Below it, there are fields for 'Cgde', 'Description', 'Level', and 'Credit Memo Limit'. The 'Cgde' and 'Description' fields both contain 'Manager'. The 'Level' field contains '3'. The 'Credit Memo Limit' field contains '\$100,000.00'. Below these fields are tabs for 'Application Access' and 'Report Access'. The 'Application Access' tab is active, showing a list of modules with checkboxes. The 'Module' column lists 'CM' for each item. The items are: Client Management, Cancellations, Collections, Company Rate Change, Customer Explorer, Customer Query Builder, EFT Customer, Manage Chain Accounts, Master Account Mgmt, New Customer, Manage Contacts, Edit Existing Customer, and Create New Site. At the bottom of the window are buttons for 'Print', 'Apply', 'New', and 'Delete'. A blue dashed arrow points from the 'Credit Memo Limit' field to the 'CM' module in the list.

Access	Module
<input checked="" type="checkbox"/> Client Management	CM
<input checked="" type="checkbox"/> Cancellations	CM
<input checked="" type="checkbox"/> Collections	CM
<input checked="" type="checkbox"/> Company Rate Change	CM
<input checked="" type="checkbox"/> Customer Explorer	CM
<input checked="" type="checkbox"/> Customer Query Builder	CM
<input checked="" type="checkbox"/> EFT Customer	CM
<input checked="" type="checkbox"/> Manage Chain Accounts	CM
<input checked="" type="checkbox"/> Master Account Mgmt	CM
<input checked="" type="checkbox"/> New Customer	CM
<input checked="" type="checkbox"/> Manage Contacts	CM
<input checked="" type="checkbox"/> Edit Existing Customer	CM
<input checked="" type="checkbox"/> Create New Site	CM