# SedonaOffice
# Customer Group
# Security

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# About This Document

This document provides information on the Customer Group Security feature.  The information contained herein is an excerpt from the SedonaOffice Online Help.

# Customer Group Security Overview

Customer Group Security is used to group your Customers together so that you are able to apply security within that particular group.  For example, if you have different branch offices, you may limit employees to which customer records they may access.  This additional level of security is activated under the *User* setup table found in SedonaSetup in conjunction with a setting under *Setup Processing for Accounts Receivable* within SedonaSetup.  A User may be assigned to one or multiple Customer Groups.  **If your company activates this security functionality, every customer must be assigned to a Customer Group**.  The Customer Group field is assigned to the Customer on the Customer Setup Information form.

Additionally, you may assign a User to all Customer Groups but have the ability to make certain Customer Groups read only.  This would allow the User to open a customer record but would not be able to make any changes.

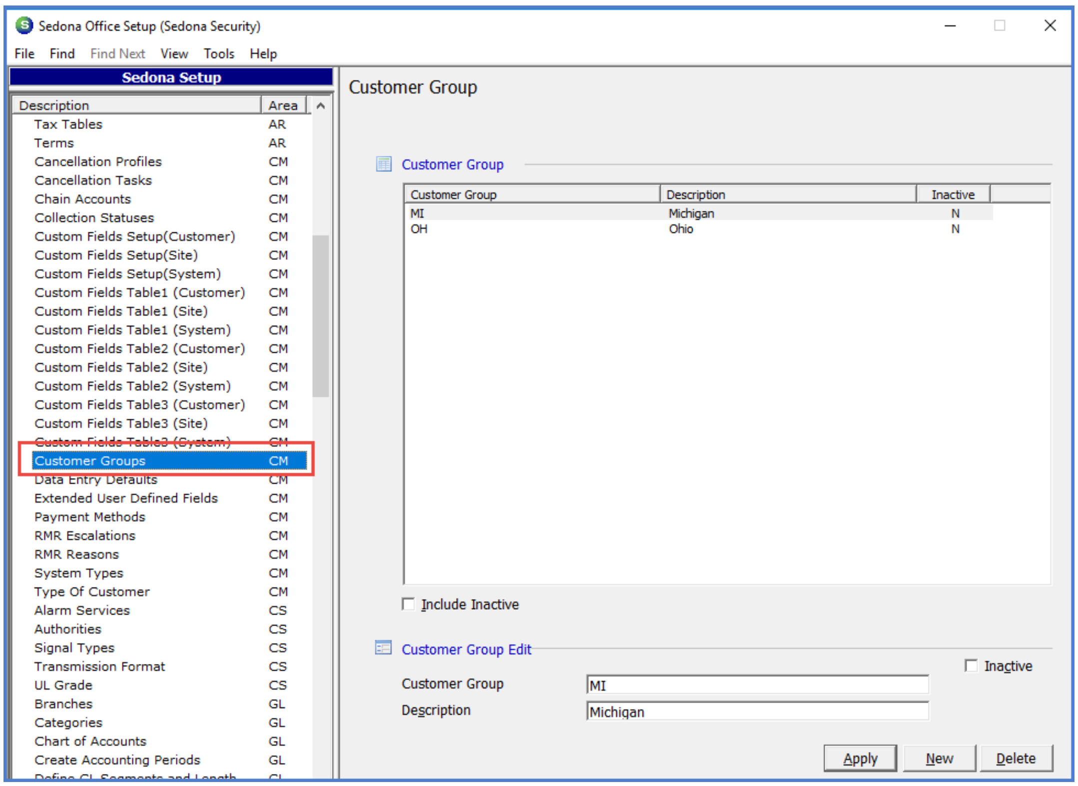
# Setup

To be able to use the Customer Group Security feature, three setups need to be addressed first.

# Customer Group Setup Table

You must first create the Customer Groups in SedonaSetup. A Customer Group name could be the same as a Branch name or any other nomenclature you would like to use. You may have as many Customer Groups as needed.

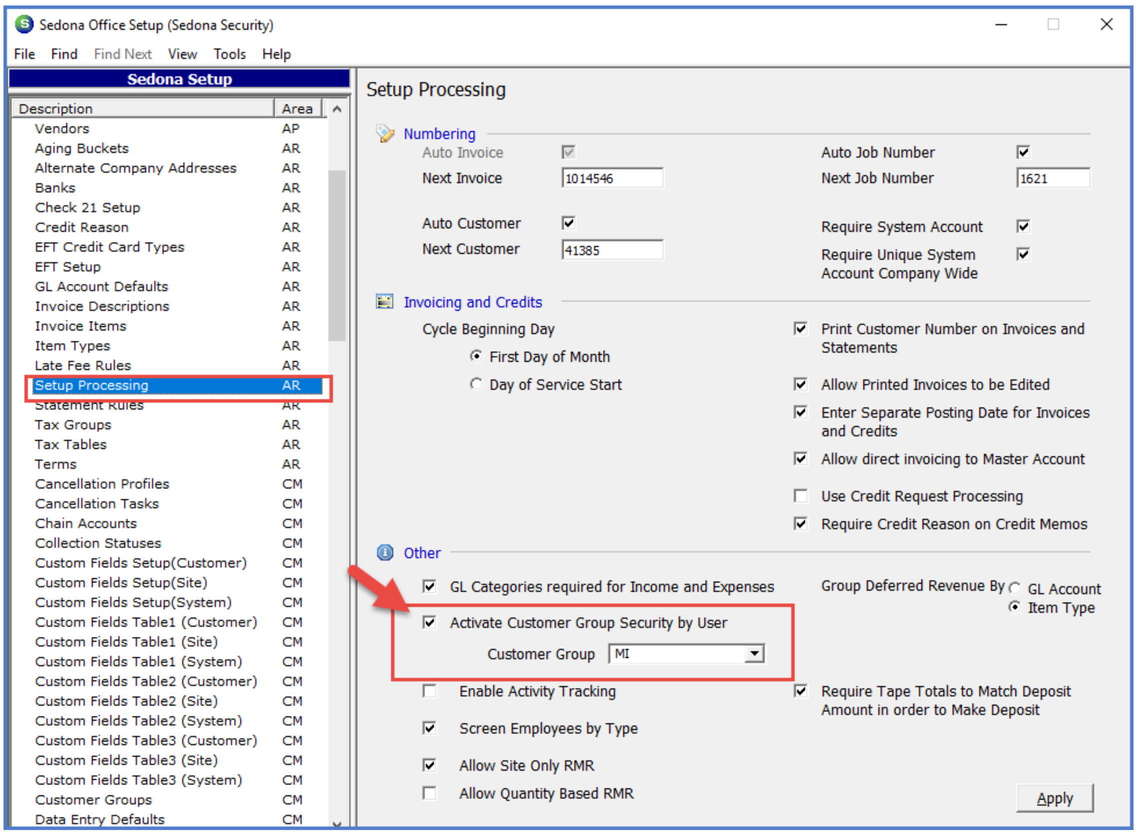
**Note: Once you begin using Customer Group Security, if you decide to add additional Customer Groups, make certain to go to each User in the User Setup table and link the User to the new Customer Groups where applicable.**



# Setup Processing for AR

This setup form is where the activation of the use of Customer Groups is set.  Once you check the “Activate Customer Group Security by User” checkbox, you will need to select the default Customer Group from the drop-down list.  When a User creates a new customer, this default Customer Group will auto-fill into the Customer Group field on the customer setup form.

**Note:  If your company is actively using SedonaOffice and you decide you want to use this feature, prior to activating Customer Group Security, each Customer record must be linked to a valid Customer Group.  The SedonaOffice support team can assist in doing this electronically.  This is a billable service.**

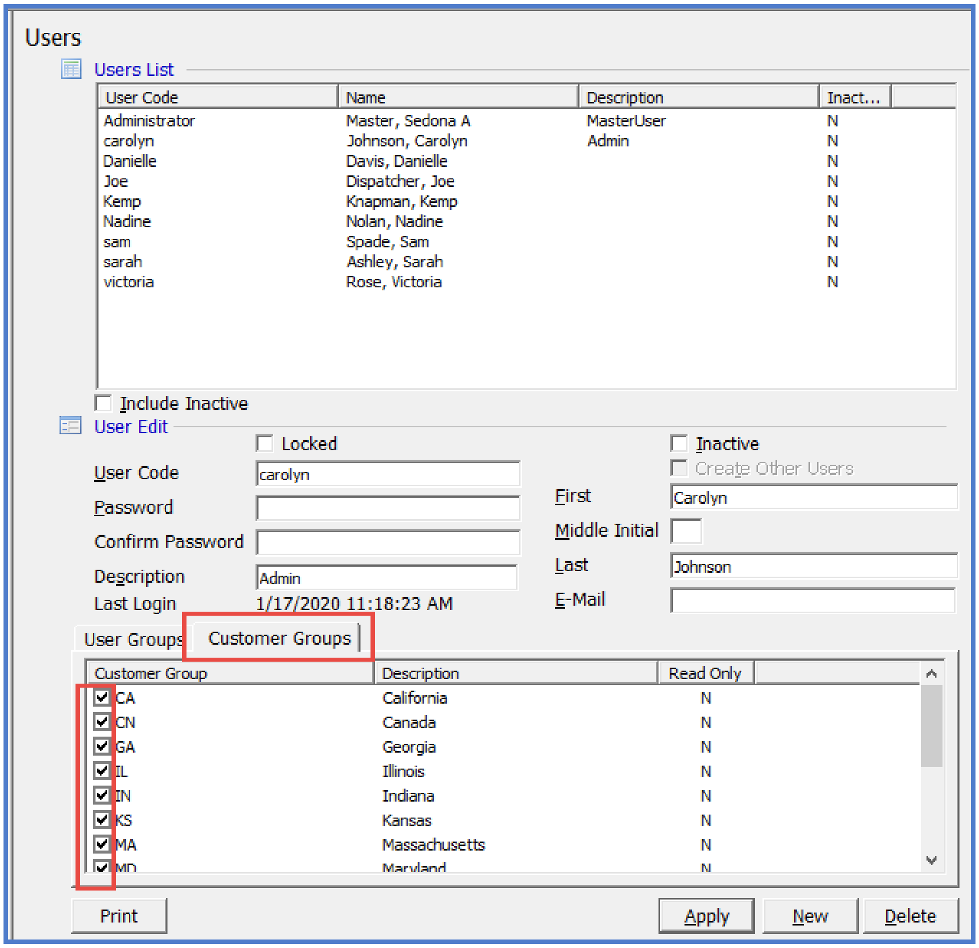


# User Setup

Once you have activated Customer Group Security on the Setup Processing for AR form, a new tab (Customer Groups) will be displayed on the User setup form. For each User, you will need to check the box to the left of each Customer Group to which the User will have access.

Once all Customer Groups are selected for the User, click the Apply button to save. Repeat the process for all Users that will need to have access to Customer information.

**Note: Once you begin using Customer Group Security, if you decide to add additional Customer Groups, make certain to go to each User in the User Setup table and link the User to the new Customer Groups where applicable.**



If there is a Customer Group that you want to make read only for the User, check the box to the left of the Customer Group, then right-click and select the Read-Only option.

# Functionality

When creating new Customers, the Customer Group field is required. You will not be able to save a new customer without selecting a Customer Group from the drop-down list.

The Customer Group 2 field is no longer used in the software.