

Managing Users

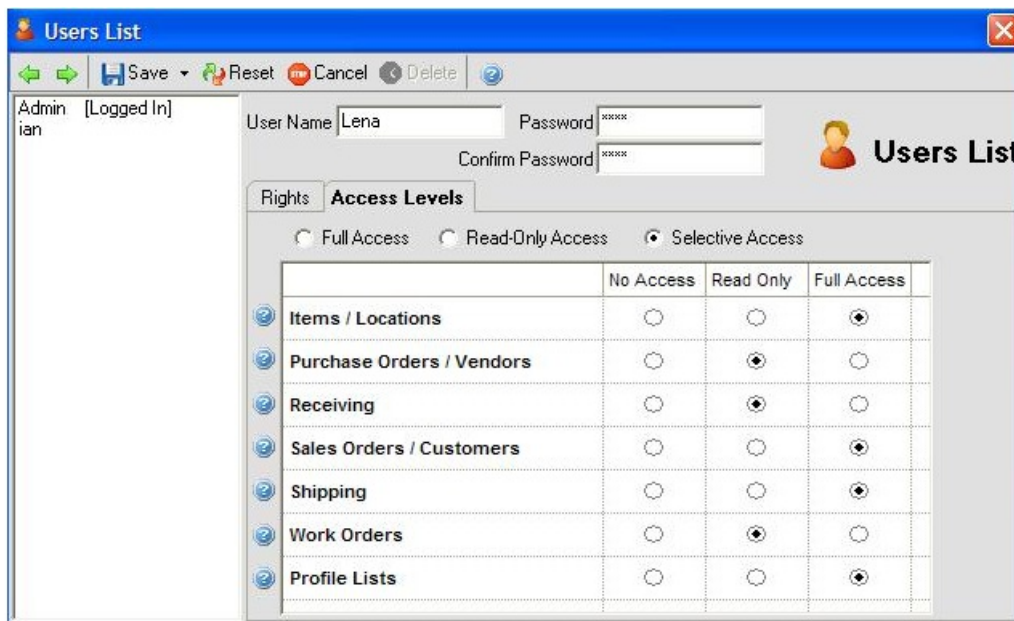
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The Manage Users command, available from the Company menu, allows you to set access levels for every individual in your organization who will be accessing the All Orders system, including sales, administration, production teams, etc. This must be done separately within All Orders, as the application does not make use of QuickBooks user profiles.

By default, only the Admin account exists. This account does not initially have a password. If you're going to be setting up a multi-user environment, then this is the first thing you'll want to remedy. Administrators have complete access to the program and its data, and only administrators can view, add, edit, or delete users and user rights. As such, this account needs to be well-protected with a strong password. Type a password into the Password field, and then retype it in the Confirm Password field.

Once you've protected your Admin account, it's time to add other users. Choose Save & New from the Save drop-down list button. You'll then be required to choose a User Name and Password as well as set access privileges.

After entering the unique user name and password, click the Access Levels tab.



The screenshot shows the 'Users List' application window. The 'Admin' user is logged in. The 'User Name' field contains 'Lena', and both 'Password' and 'Confirm Password' fields are masked with 'xxxx'. The 'Access Levels' tab is selected, showing three radio button options: 'Full Access', 'Read-Only Access', and 'Selective Access'. The 'Selective Access' option is selected. Below these options is a table with columns for 'No Access', 'Read Only', and 'Full Access'. The table lists various system components with radio buttons indicating the access level for each.

	No Access	Read Only	Full Access
Items / Locations	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Purchase Orders / Vendors	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Receiving	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Sales Orders / Customers	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Shipping	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Work Orders	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Profile Lists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

On this screen you can assign access levels to various parts of the program as follows:

- No Access. User cannot edit or even read the list.
- Read-Only Access. User can access the data, but cannot make edits.
- Full-Access. User can access the data and has full write privileges for making edits.

Then click the Rights tab and complete the user rights:

1. This user is connected to QuickBooks option appropriately. Unchecking this option disables synchronization with QuickBooks. See Synchronizing with QuickBooks on different strategies for QuickBooks exchanging information with QuickBooks.

3. There are numerous check boxes that can be used to grant/restrict access to the user in question, such as the ability to delete records or approve Sales Orders. Check all the boxes that apply.
4. In addition to these check boxes, All Orders also sports two special filters: by Sales Rep, and by Location. For example, if you want to restrict an employee's data access to a customers having a particular sales rep.
5. Choose either Save & Close to save your work and exit the dialog, or Save & New to save the current user and move on to the next one.

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