USER MAINTENANCE

🤓 User Maiı	ntenance (ABC) 3/30/2015					
User Logon		4 D DI			Сору	
First Name	Bob Last Nan	ne Builder			User Code B	
Password	S\$\$\$\$\$\$\$\$\$\$\$\$\$\$\$\$\$\$\$ Confirm Passwo	rd	Cus	tomization Group	Expires	
E-mail	rklutho@connerash.com			Job Title	Accounting Manager	r/Controller 🔄
<u>1</u> . Maintena	ance <u>2</u> . Preferences <u>3</u> Auto-6	Complete				
	Company	Role		Start Date	Expiration Date	
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2	Ф.		-			
User Ac	ccount Locked			Accept	<u>C</u> ancel <u>D</u> el	lete 👌 🕢

Library Master -> Main -> User Maintenance Tab

User Code: Three character User Code that is used to identify the person who entered various transactions.

Password: The use of a password is optional but highly recommended. **The password is Case Sensitive**, the User Logon is not.

Customization Group: The customization code is used by the Customizer module and user lookups for group customizations.

Expires: Enter the date that you want the user's account to expire.

Email Address: Enter the Users email address - Optional

Job Title: Enter the Users job title from list - Optional

Company/Role: Select the role to assign to the user for the company selected. If you assign multiple roles to a user, the least restrictive security permissions prevail.

Start/Expiration Date: Enter the Start date that a user can access the system. Enter the Expiration date to terminate the users' login as of a specific date. This feature is Optional and only used to restrict access.

User Account Locked: The user's account will be locked automatically if too many incorrect logon attempts are made by the user or if the date in the user's Expiration Date field has passed. Password Attempt Lockout is set up in the System Configuration menu on the Security Tab.

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User Logon	Bob	<u> </u>	D D		Co	PY	<u>R</u> ename
First Name	Bob	Last Name	Builder		User Code	BOB]
Password	\$\$\$\$\$\$\$\$\$\$	nfirm Password		Customization Group	Expires		
E-mail	rklutho@connerash.co	m		Job Title	<select job="" title=""></select>		•
<u>1</u> . Maintena	ince 2. Preferences	<u>3</u> Auto-Cor	nplete				
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Low Spee	ed Connection		Partial L	ookup Default	Begins with	-	
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Library Master -> Main -> User Preferences Tab

Automatic Logoff: Select this check box to log off a user automatically after the number of minutes entered in the Automatic Logoff Delay in Minutes field has elapsed with no activity. Clear this check box if you do not want to log off a user automatically.

Implied Decimal Point: Select this check box to use an implied decimal point when entering numeric values. The system adds the decimal point automatically when you enter numeric values (for example, 123 = 1.23). Clear this check box if you do not want to use an implied decimal point (for example, 123 = 123.00).

[ENTER] Key Like [TAB] Key for Grid: Select this check box to allow the ENTER key to function like the TAB key within grids. If this check box is selected, the ENTER key advances to the next field in the grid. Clear this check box if you want the ENTER key to advance to the next line within the grid.

Display Reduction Amounts in Red: Select this check box to display amounts that reduce the balance in red text. Clear this check box if you do not want to display amounts that reduce the balance in red text.

Use Graphic Report Format: Select this check box to print graphical reports. This setting applies only to standard reports in the Job Cost, Material Requirements Planning, Payroll, Time Card, and Work Order modules.

Partial Lookup Default: Select the method to display data when performing a partial lookup at a field.

- Select Begins with to display only records with matching criteria. For example, if "B" is entered as the partial lookup, only records that start with "B" appear.
- Select Greater than to display all records that start with the selected criteria. For example, if "B" is entered as the partial lookup, all records that start with "B" and greater than "B" appear.

Prompt for Company Code: Select this check box to prompt the user for a company code when logging on to the system. Clear this check box if you do not want to prompt the user for a company code when logging on to the system.

Default Report Preview Zoom: Enter the default zoom setting to preview reports, forms, and listings. You can type a value between 25 and 400 percent, or select a zoom setting from the list.

- Select Page Width to display the entire width of the report page in the Report Preview window.
- Select Whole Page to display the whole page of the report in the Report Preview window.
- Note: Reports, forms, and listings will preview at the zoom setting for the selected user in all modules except Job Cost, Material Requirements Planning, Payroll, TimeCard and Work Order.

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Pa	ssword	\$\$\$\$\$\$\$\$\$\$ Confirm Passv	vord	Customization Group	Expires	
E-r	nail	rklutho@connerash.com		Job Title	<select job="" title=""></select>	-
1	. Maintena	ance] <u>2</u> . Preferences] <u>3</u> Aut	o-Complete			1
		Record Type		Description	Enable	- 🔜 -
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Library Master -> Main ->Auto-Complete Tab

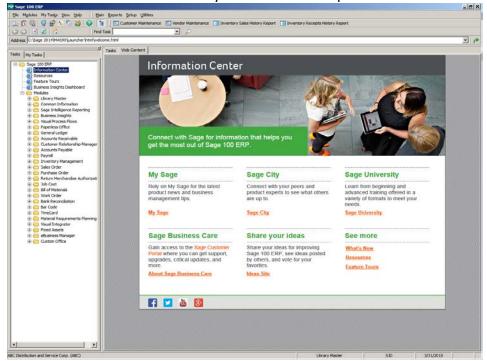
Enable: Select this check box to enable the auto-complete feature for this type of record. Clear this check box to disable the feature. This feature can be enabled for this user only if the Enable Auto-Complete check box is selected in <u>System Configuration</u> -> Preferences Tab.

^{sage} System Configuration (ABC) 3/30/2015	
Registered Customer Conner Ash P.C.	Uninstall
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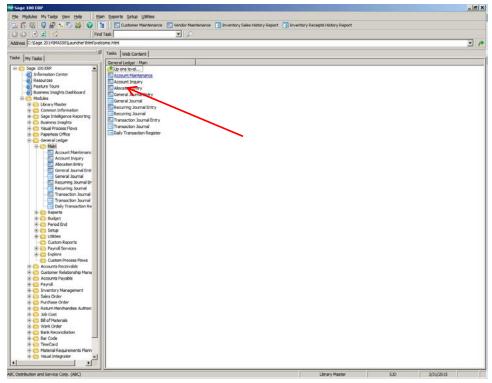
Navigating the Menus

Detail View – Shows entire desktop and provides access to features such as Tasks, MyTasks and Web Content.

Click the Folder next to the Menu item you would like to open.



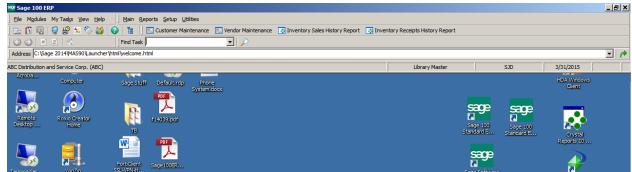
The menu item list will appear on the right side of the screen. Click on the menu item that you want to open.



<u>Collapsed View</u> – Hides the Tasks, My Tasks and Desktop Web pages. It frees up your desktop space. Click on the Detail View button to collapse the desktop.

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The Sage Desktop will be minimized to the top of the screen, showing the Windows Desktop in the background.



Click on the Module code field on the status bar to change modules.

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The menu will change at the top to the module menu that you have selected.

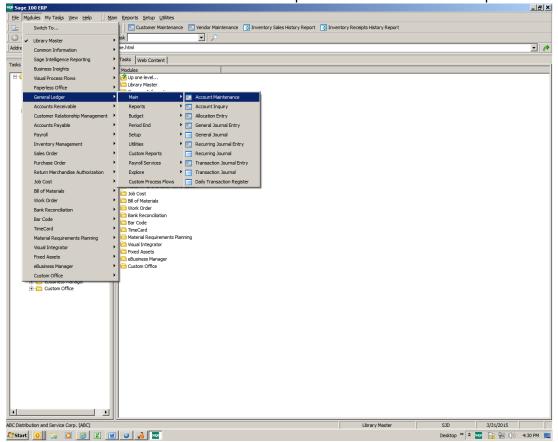
View Help	Setup Utilities Custom Reports	Payroll Services Explore	Custom Process Flows
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Corp. (ABC)			General Ledger

Click on the menu item that you would like to access.

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<u>Cascading View</u> – Click Modules from top menu, then scroll to the menu you would like to select. Scroll to the right to select the menu items.

Note:	This view of	can be used	l with full	screen Desk	top or with	a minimized I	Desktop.



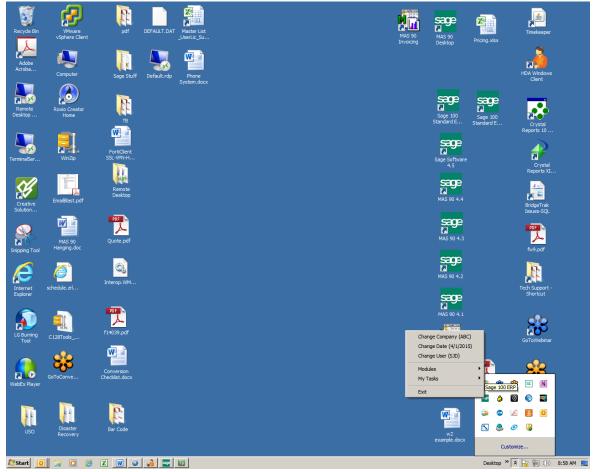
Minimized View – allows you to minimize your Desktop but still access most of the software functions.

S View Help
 Main Beports Budget Period End Setup Utilities Qustom Reports Payrol Services Explore Custom Process Flows

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Click on the Minimize button in the upper right-hand corner.

Right click on the Sage icon in System Tray. Then navigate to the menu item you would like to access.

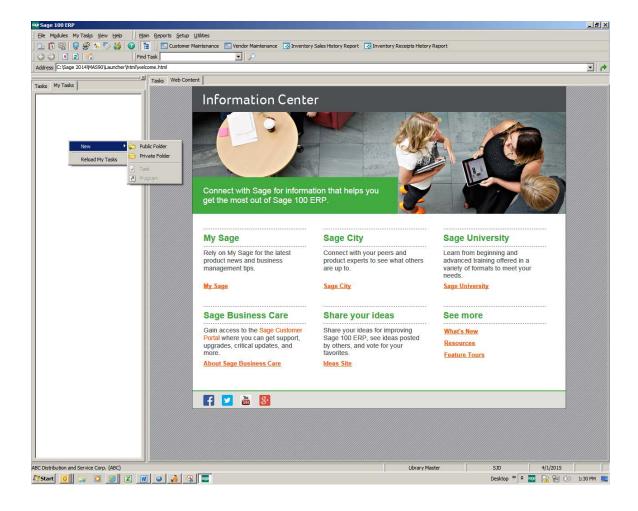


My Tasks:

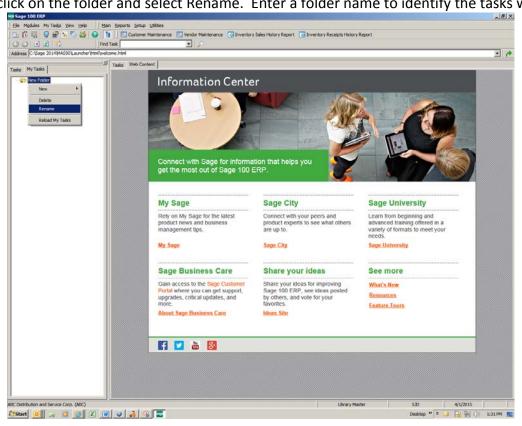
Click on the My Tasks tab to create new tasks or access existing tasks.

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Right click in the blank white area. Click on New and select either the Public or Private folder.



Right click on the folder and select Rename. Enter a folder name to identify the tasks within the folder.



To add a Task to the Folder, right click on the Folder, click on New, then click on Task.



A Browse window will appear.

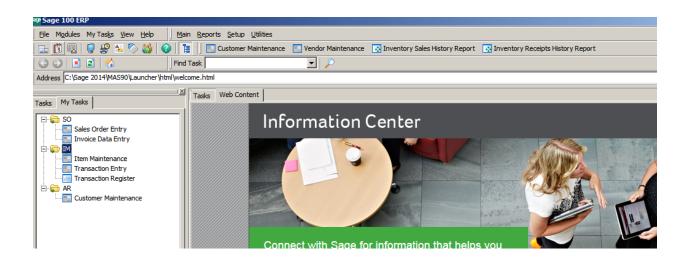
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🛅 Business Insights	🛱 Purchase Order 🛛 🛱 Fix
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🛅 General Ledger	🛅 Bill of Materials
C Accounts Receivable	🚞 Work Order
Customer Relationship Management	🛅 Bank Reconciliation
Counts Payable	🛅 Bar Code
•	
Task Name:	Open
	Cancel

Double click on the Module, another Browse window will appear.

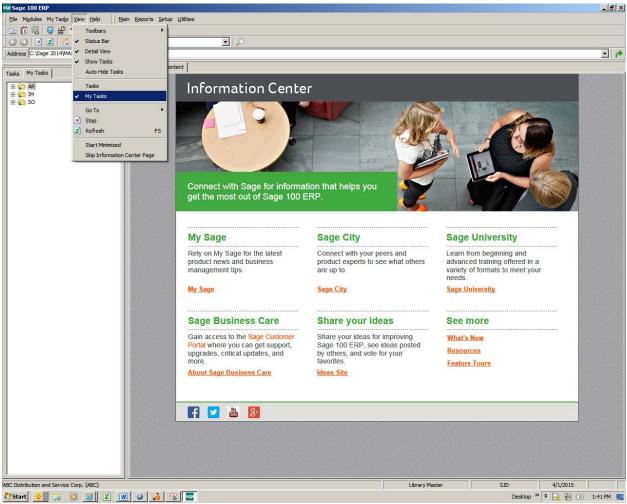
Browse				<u>?</u> ×
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Main Shipping Inquiries Reports Period En Setup Utilities Custom R Explore Custom P	_			
Task Name:				Open Cancel

Select the Menu, and then double click on the Task. You can select multiple tasks to add by repeating this process.

Browse	? ×
Location: 🔂 Main	- 🔾 🔁 📰 📰
Sales Order Entry Sales Order Printing Picking Sheet Printing Shipping Label Printing Daily Drop Ship Report Invoice Data Entry COD Label Printing COD Label Printing Daily Sales Reports/Updates Daily Transaction Register	Auto Generate Invoices Selection Auto Generate Orders Selection Sales Order Batch Authorization
Task Name: Sales Order Entry	Open Cancel



To set the My Tasks tab as your default when opening Sage, click on View, select My Tasks from the drop down list.



Bonus Round:

- Undock menus
- Add menu items to top screen