

# AUTOPOWER

## System

**SETUP USERS  
&  
PRINTERS**

**USER GUIDE**



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## INTRODUCTION

### Overview

The purpose of this guide is to explain setting up printers and users within the AutoPower System.

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## SETUP PRINTERS

The Printer Setup will allow you to create a Printer Type, create a Printer Form Number for a Printer Type and create a Printer Group that can then be assigned to a user. The user's Printer Group is assigned using the Login User File Maintenance screen under the Utility Menu. When the user logs onto the system the user will be assigned to this Printer Group.

05/25/2016      Login User File Maintenance      IN-OPFM

LOGIN ID.....:

1. Operator Number.....:	19. Cust F/M Priv Lvl:
2. Printer Group.....:	20. Scroll Alert BAMS:
3. Start-Up Menu.....:	21. Sales History O/E:
4. Spooler Access.....:	22. Collection Notes..:
5. File Maintenance.....:	23. Remote Login.....:
6. Enter Credit Memo's...:	24. AutoCat Style.....:
7. Release Credit Holds...:	25. Access Payroll....:
8. Time Clock Manager....:	26. Access BPRO.....:
9. Stock Adj. Branches...:	27. Admin HomePage...:
10. Inventory Branch.....:	28. GUI System.....:
11. Department Number....:	29. Menu Shortcuts...:
12. ARBy Access.....:	30. OE Price Changes..:
13. Add New Account in O/E:	31. Menu Buttons Pos..:
14. Can Access TCL.....:	32. Gui Font Size.....:
15. Credit Hold Que Name..:	33. Admin News.....:
16. Alt. Menu Profile.....:	34. Password Required:
17. Allowed to see cost...:	35. Is a Manager.....:
18. Branch Entry in O/E...:	36. Show CritNotes...:

Enter the User's Login ID; or, ?|F1

## ACCESSING THE PRINTER SETUP SCREEN

**From the Main Menu > Click on Utility Programs Menu > Click on Printer Controls**

The Printer Setup screen will display as shown below.

The screenshot shows a window titled "Printer Setup" with a close button (X) in the top right corner. Below the title bar, the text "Setup Printer Definitions" is displayed in blue. To the right of this text, the user information is shown: "User: CPADGETT - CYNTHIA PADGETT" and "User's Printer Group: DEFAULT". Below this, there are three tabs: "Printer Type", "Form No.", and "Printer Group". The "Printer Type" tab is selected. The main area of the window is light green and contains the following fields: "Printer Type:" with a dropdown menu, "Description:" with a text input field, "Type of Printer:" with a text input field, and "Printer Model:" with a text input field. To the right of these fields are three buttons: "OK", "Delete", and "Cancel". At the bottom right of the window is a "Close" button.

The User Name and User's Printer Group fields at the top right of the screen will default to the name of the user who is logged onto the system and will be adding/changing or deleting the printer definitions. It is informational only detailing who is logged in this screen at the moment.

## ESTABLISHING PRINTER TYPES

The Printer Setup application contains a tabbed panel with three tabs: **Printer Type**, **Form No.** and **Printer Group**. You can click on the Close button to close this screen and any changes made will not be saved and you will return to the menu.

### Printer Setup: Printer Type Tab

The **Printer Setup: Printer Type** screen is used to maintain printer type definitions. Printer types distinguish "laser", "dot matrix" and "label" types of printer.

The screenshot shows the 'Printer Setup' application window. The title bar reads 'Printer Setup' with a close button. The main area has a header 'Setup Printer Definitions' and user information: 'User: CPADGETT - CYNTHIA PADGET' and 'User's Printer Group: DEFAULT'. Below this is a tabbed interface with three tabs: 'Printer Type' (selected), 'Form No.', and 'Printer Group'. The 'Printer Type' tab contains a 'Printer Type:' dropdown menu with 'LASER' selected. Below this is a text box for 'Description:' containing 'LASER PRINTER'. To the right of the text box are three buttons: 'OK', 'Delete', and 'Cancel'. At the bottom right of the window is a 'Close' button. The 'Type of Printer:' and 'Printer Model:' fields are empty.

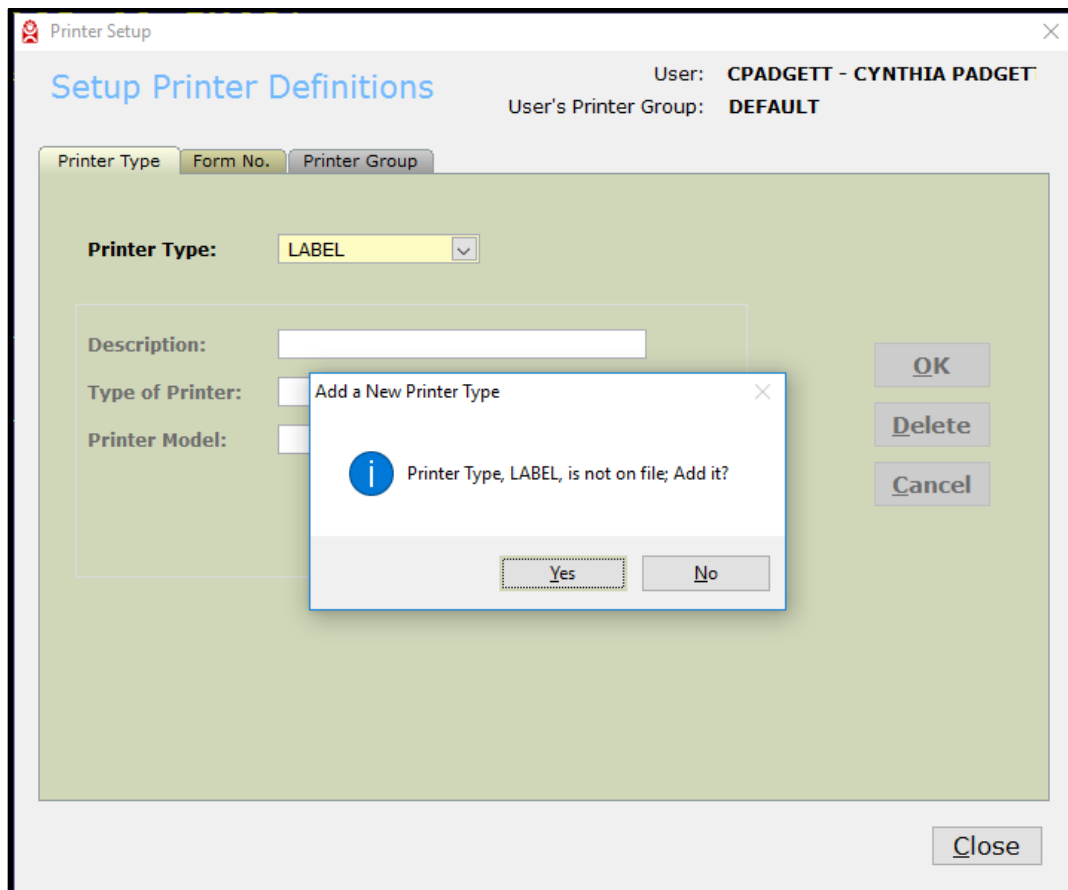
When you first use this screen the Printer Type box is empty. Once printer types have been added, click on the drop down arrow to see the existing printer types. Clicking on an existing printer type the description, type of printer and printer model will be shown.

### Adding a Printer Type

You can also type in a non-existent printer type into the Printer Type box. A message popup appears “Add a New Printer Type and the message Printer Type (Name) is not on file; Add it?”

If you click on “Yes”, the entry will be accepted and the cursor will now be in the description field. If you click on “No”, the information typed will be discarded.

An example of adding a new Printer Type is shown below.



### Editing Printer Type Data

If a change is made to an existing Printer Type, the OK button will be highlighted so that you may click on it to save your changes.

### Deleting a Printer Type

You can also delete an existing Printer Type. Once a Printer Type has been selected, click on the Delete button to delete it.

The **Description box** will allow you to type in a description of the printer. The printer could be a Laser Printer, Label Printer or maybe a report printer. This is a freeform entry.

The **Type of Printer box** will allow you to type in if the printer is a LASER, LABEL or DOTMTX printer.

The **Printer Model box** will allow you to type in the manufacturer make or model of the printer.

**You must click on OK to save your changes!**

Click on the Cancel button to exit from this program and return to the menus. Should changes have been entered and the Cancel button is clicked, those changes will not be saved.



## Printer Setup: FORM NUMBER

The **Printer Setup: Form Number tab** defines "form numbers" to be associated with the physical printer. This screen maps the "form number" to the operating system's printer name and its printer type. The Printer Form Number screen is shown below on the Form No. tab.

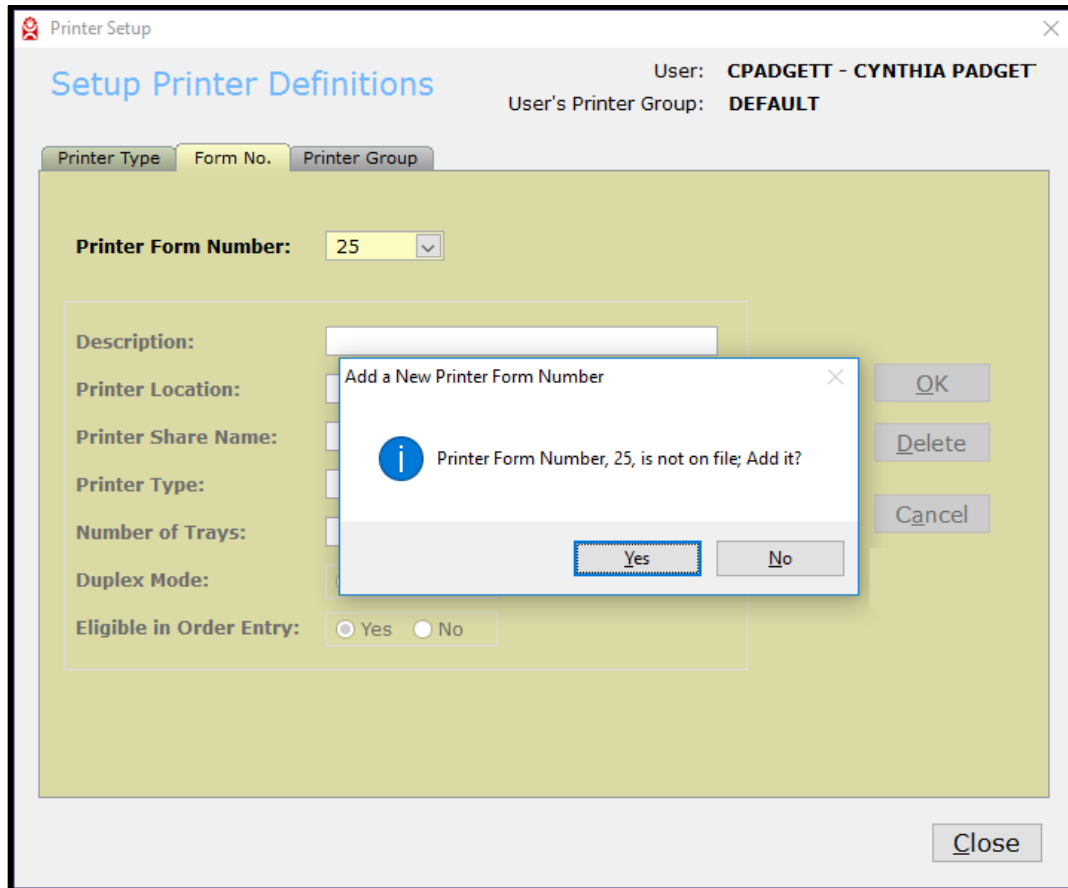
The screenshot shows the 'Printer Setup' window with the 'Form No.' tab selected. The window title is 'Printer Setup' and it includes a close button (X). The user is identified as 'CPADGETT - CYNTHIA PADGETT' and the printer group is 'DEFAULT'. The 'Form No.' tab is active, showing a list of printer form numbers and their associated details. On the left, there are input fields for 'Printer Form Number:', 'Description:', 'Printer Location:', 'Printer Share Name:', 'Printer Type:', 'Number of Trays:', 'Duplex Mode:', and 'Eligible in Order Entry:'. The 'Printer Form Number:' field has a dropdown arrow. The table below lists the existing printer form numbers and their details.

Form No	Printer Model	Description	Physical Location
0	LASER	SYSTEM PRINTER	W1
11	LASER	SUPPORTLASER	W1
22	LASER	LASERJET9000	W1
23	LASER	SHIPPING LABEL PTR	W1
24	LASER	PRODUCT LABEL PTR	W1
33	LASER	Todd's Printer	Todd's Office
44	LASER	Valerie's PTR	Valerie's Cube
55	LASER	Tom's PTR	Tom's Cube
99	LASER	EODPTR	W1
900	LASER	SYSTEM PRINTER 0	W1
999	LASER	PDFCreator	Virtual

At the bottom right of the window is a 'Close' button.

When you first use this screen the fields are blank. Once Form Numbers have been added you can click on the drop down arrow to view the existing Printer Form Numbers. The Form Number, Printer Model, Description and its Physical location will display. You may click on a row to select the Printer Type for editing. The description, printer location, printer share name, printer type, and the number of trays are populated from existing Printer Form Numbers setup on your system.

You may type in a **Printer Form Number** in the Printer Form Number box that hasn't been setup. A message will popup that the printer form number is not file; Add it? if you click Yes, the new Printer Form number will be accepted and your cursor will go to the description field. If you click on No, then the data that you typed in will be discarded.



The **Description field** is a textbox that accepts any freeform entry. This is a required field. Type in this field describing how the printer will be used for example: Invoicer, Label Printer, Report printer and so forth. The Description is useful when selecting a specific printer when running reports.

The **Printer Location field** is a textbox that accepts freeform entry. This is a required field. Type in this field the exact location where the printer resides; e.g., W1 Warehouse, Accounting, Counter and so forth.

The **Printer Share Name field** is a textbox that accepts freeform entry. Enter the Sharename assigned to this printer when it was setup in the Windows Printer Folder. Must precede the Sharename with an "=" sign. **Example, =EODPTR**

The **Printer Type field** is a dropdown of the printer types setup in the first tab named Printer Type. This will identify the Type of Printer associated with its Form Number. Select from the dropdown the type of printer that you are setting up, example Laser or Label.

The **Number of Trays field** will allow you to enter in the number of trays contained in this printer. The software may be configured to print documents from one of these trays. Do not count the manual feed as a tray. This is not a required field.

The **Duplex Mode field** will allow you to designate if this printer has a duplex mode that will allow you to print on the back of invoices or other documents.

The **Eligible in Order Entry field** will allow you to designate if this printer is to be available for selection from within the Order Entry system when requesting the printing of Invoices, Quotes, Picking Tickets or Packing List.

The screenshot shows a 'Printer Setup' window with a title bar containing a red 'X' icon and the text 'Printer Setup'. The window has a close button (X) in the top right corner. The main area is titled 'Setup Printer Definitions' in blue. Below the title, it shows 'User: CPADGETT - CYNTHIA PADGETT' and 'User's Printer Group: DEFAULT'. There are three tabs: 'Printer Type' (selected), 'Form No.', and 'Printer Group'. The 'Printer Form Number' is set to '99'. The 'Description' field contains 'EODPTR'. The 'Printer Location' field contains 'W1'. The 'Printer Share Name' field contains '=EODPTR'. The 'Printer Type' dropdown is set to 'LASER'. The 'Number of Trays' field is empty. The 'Duplex Mode' has radio buttons for 'Yes' and 'No', with 'No' selected. The 'Eligible in Order Entry' has radio buttons for 'Yes' and 'No', with 'No' selected. On the right side, there are buttons for 'OK', 'Delete', and 'Cancel'. At the bottom right, there is a 'Close' button.

## Printer Setup: Printer Group Tab

The **Printer Setup: Printer Group** screen defines a "Printer Group". A *Printer Group* is a grouping of Printer Form Numbers associated with various document types. Subsequently, each user is assigned to a printer group, thus the user inherits the printer (Form Number) from their Printer Group.

Remember each user is assigned a Printer Group which is defined by the User's Profile.

This program will allow you to define the set of printers into a named group. This group name is then associated with a Group of Printers.

In the example below the Printer Group was named Default. In the Default Printer Group, we assigned the Reports, Invoices, Picking Tickets, Service Work Orders, Rebuild Work Orders, Packing Lists, Receiving Report, Barcode Receive Report to print to Printer Form Number 0. The UPS Shipping labels, Shipping labels, will print to Printer Form Number 22, while the Receiving Bar Code Product Labels will print to Printer Form Number 23.

**Printer Setup**

Setup Printer Definitions

User: CPADGETT - CYNTHIA PADGETT  
User's Printer Group: DEFAULT

Printer Type | Form No. | Printer Group

Printer Group: DEFAULT

Documents Types

	Form Number		Form Number
Reports:	22	UPS Shipping Labels:	22
Invoices:	22	Shipping Labels:	22
Cashier Invoice:		Rebuilt Unit Tags:	
Credit Memos:		Core Tags:	
Picking Tickets:	22	Receiving BC Product Labels:	23
Service Work Orders:	22	Bar Code Product Labels:	
Rebuild Work Orders:	22	Small Rebuilt Product Labels:	
Packing Lists:	22	Large Rebuilt Product Labels:	
Receiving Report:	22	Package/Box Labels:	
BarCode Receive Rpt:	22		

OK  
Delete  
Cancel  
Help  
Close

Printer Setup

Setup Printer Definitions

User: CPADGETT - CYNTHIA PADGET  
User's Printer Group: DEFAULT

Printer Type Form No. Printer Group

Printer Form Number: 0

Description: SYSTEM PRINTER

Printer Location: W1

Printer Share Name: =UVDEFAULT

Printer Type: LASER

Number of Trays:

Duplex Mode: ☐ Yes ☒ No

Eligible in Order Entry: ☐ Yes ☒ No

OK

Delete

Cancel

Close

You can change any Document type to print to a different Printer Form Number “printer number” just by clicking on the drop down arrow and selecting the different Printer Form Number. If the Printer Group has some document types that should not be printed, leave the Form Number field blank.

Printer Setup

Setup Printer Definitions

User: CPADGETT - CYNTHIA PADGET  
User's Printer Group: DEFAULT

Printer Type Form No. Printer Group

Printer Group: DEFAULT

Documents Types

Form Number

Form Number

Reports: 22

Invoices: 22

Cashier Invoice:

Credit Memos:

Picking Tickets:

Service Work Orders:

Rebuild Work Orders:

Packing Lists:

Receiving Report:

BarCode Receive Rpt:

UPS Shipping Labels: 22

Shipping Labels: 22

Rebuilt Unit Tags:

Core Tags:

OK

Delete

Form No	Printer Model	Description	Physical Location
0	LASER	SYSTEM PRINTER	W1
11	LASER	SUPPORTLASER	W1
22	LASER	LASERJET9000	W1
23	LASER	SHIPPING LABEL PTR	W1
24	LASER	PRODUCT LABEL PTR	W1
33	LASER	Todd's Printer	Todd's Office
44	LASER	Valerie's PTR	Valerie's Cube
55	LASER	Tom's PTR	Tom's Cube
99	LASER	EODPTR	W1
900	LASER	SYSTEM PRINTER 0	W1
999	LASER	PDFCreator	Virtual

Close

## SETTING UP USERS

### Setting up a User

From the Main Menu > Click on Utility Programs Menu > Click on Operator/User/Mechanic F/M

The Operator/Salesperson/Mechanic File Maintenance screen will display as shown below.

Your cursor will be in the Operator/Salesperson/Mechanic Number field..

05/20/2016	Operator/Salesperson/Mechanic File Maintenance	AR-NSFM
Operator/Salesperson/Mechanic No...: █		
1) Name .....		
2) Status: (A)ctive, (I)nactive .....		
3) Branch Location (W1, W2, etc) .....		
4) Delivery Driver (Y,N) .....		
5) Shop Cost per Hour .....		
6) Shop Billing Rate per Hour .....		
7) Department No .....		
8) Employee Payroll No .....		
9) Employee Email Address .....		
10) Cell Phone No .....		
11) Shift Start Time .....		
12) Lunch Start Time .....		
13) Lunch Stop Time .....		
14) Shift Stop Time .....		
15) Supervisor Group IDs for Alerts ...:		
16) Able to Change Help Messages .....		
17) Driver's License Number .....		
18) Driver License Expiration Date .....		
Enter the User's ID (can be alpha-numeric), or ? F1 to search		

**Field Descriptions:**

**User Number** - Enter the Operator/Salesperson/Mechanic number. The Operator/Salesperson/Mechanic/Users can be the same as the employee number. If this is a new record, the cursor will advance to the next field. If this is an existing user record, the Operator/Salesperson/Mechanic information will display on the screen.

You can also type in a question mark at the Operator/Salesperson/Mechanic Number field to view a dialogue box of existing Users setup on the system.

05/20/2016 Operator/Salesperson/Mechanic File Maintenance AR-HSFM

Operator/Salesperson/Mechanic No.... ?

1) Name .....  
 2) Status: (A)ctive, (I)nactive .....  
 3) Branch Location (W1, W2, etc) .....  
 4) Delivery Driver (Y,N) .....  
 5) Shop Cost per Hour .. PLEASE SELECT SALESPERSON  
     CP CYNTHIA PADGETT  
     2 GEORGE JONES  
     JMP JANINE POLITZ  
     JP JIM PIGG  
     0 JOHN SMITH  
     MJ MIKE JARVINEN  
     MM MIKE MALLORY  
     MJL MILTON, LEONA  
     Arrow Down or <Esc>  
 6) Shop Billing Rate pe  
 7) Department No .....  
 8) Employee Payroll No .....  
 9) Employee Email Addre  
 10) Cell Phone No .....  
 11) Shift Start Time ...  
 12) Lunch Start Time ...  
 13) Lunch Stop Time ...  
 14) Shift Stop Time ..  
 15) Supervisor Group IDs for Alerts ...  
 16) Able to Change Help Messages .....  
 17) Driver's License Number .....  
 18) Driver License Expiration Date .....

1. **Name:** Type in the name of the Operator/Salesperson/Mechanic/User and press **ENTER**. Type in the first name, middle initial, and the last name.
2. **Status:** Type in **A** if the employee is an Active employee or type in **I** if the employee has been terminated or inactive.
3. **Branch Location:** Type in the Branch Location where this user works and press **ENTER**. An entry is required in the Branch Location field. The system will not advance further until an entry is made. (i.e.: W1 = Branch Location 1)
4. **Delivery Driver:** Type in **Y** if this user is a delivery driver. Type in **N** if this user is not a delivery driver. This prompt must be if the user will be assigned orders to be delivered to customers when using the Driver Delivery module.
5. **Shop Cost Per Hour:** Type in the shop cost per hour for this mechanic and press **ENTER**. The decimal points need to be entered. (Example: Forty dollars per hour enter 40.00. Remember to include the cost of this user's insurance and benefits along with hourly wage.) This field is not necessary for Payroll Time Clock Operation.

- 6. Shop Billing Rate Per Hour:** Type in the shop-billing rate per hour for this mechanic and press **ENTER**. The decimal points need to be entered.
- 7. Department number:** Type in the department number that this user is associated with and press **ENTER** or type in a **?** to view the available departments.
- 8. Employee Payroll number:** Type in the employee payroll number assigned to this user and press **ENTER**. You can also press the F4 function key to delete this field. If the Time clock and Payroll module is being used, then this field must be setup.
- 9. Employee Email address:** Type in the user's Email Address and press **ENTER**. You can press the F4 function key to delete the entry in this field.
- 10. Cellphone Number:** Type in the user's cell phone number and press **ENTER**. You can press the F4 function key to delete the entry in this field. (Informational only)
- 11. Shift Start Time:** Type in the time when this user's work shift begins and press **ENTER**. This time does print on some reports. You can press the F4 function key to delete the entry in this field.
- 12. Lunch Start Time:** Type in the time when this user's lunch period begins and press **ENTER**. You can press the F4 function key to delete the entry in this field.
- 13. Lunch Stop Time:** Type in the time when this user's lunch period ends and press **ENTER**. You can press the F4 function key to delete the entry in this field.
- 14. Shift Stop Time:** Type in the time when this user's work shift ends and press **ENTER**.
- 15. Supervisor ID's for Group Alerts:** (Future Use)
- 16. Able to Change Help Messages:** (Future Use)
- 17. Driver's License Number:** Type in the user's Driver's License Number and press **ENTER**. You can press the F4 function key to delete the entry in this field.
- 18. Driver's License Expiration Date:** Type in the expiration date for the user's driver license number and press **ENTER**. You can press the F4 function key to delete the entry in this field.



Below is an example of a User setup in the system.

05/20/2016	Operator/Salesperson/Mechanic File Maintenance	AR-NSFM
Last F/M by JOHN SMITH on 04/28/16		
Operator/Salesperson/Mechanic No...: 0		
1) Name .....	JOHN SMITH	
2) Status: (A)ctive, (I)nactive .....	A	
3) Branch Location (W1, W2, etc) .....	W1 - CHARLOTTE	
4) Delivery Driver (Y,N) .....	Y	
5) Shop Cost per Hour .....	25.00	
6) Shop Billing Rate per Hour .....	40.00	
7) Department No .....	1 - SALES	
8) Employee Payroll No .....		
9) Employee Email Address .....	support@autopower.com	
10) Cell Phone No .....		
11) Shift Start Time .....	08:00am	
12) Lunch Start Time .....	12:00pm	
13) Lunch Stop Time .....	01:00am	
14) Shift Stop Time .....	05:00am	
15) Supervisor Group IDs for Alerts ....	CPADGETT	
16) Able to Change Help Messages .....	Y	
17) Driver's License Number .....		
18) Driver License Expiration Date .....		
Options: (U)pdate, (E)dit, (DELETE), (S2), (P)rofile, E(X)it, Item#: █		

## Options:

- **(U)pdate:** Type in “U” and pressing enter will update your inputs or edits to the salesman record.
- **(E)dit:** Type in “E” and pressing enter will allow you to edit all fields starting from the User’s name and going from field to field allowing you to edit the field.
- **(D)elete:** Type in the word “DELETE” will allow you to delete the complete record.
- **(S2):** Type in “S2” and pressing enter will display the screen number two so that you may enter or edit the User’s passwords.
- **(P)rofile:** Type in “P” and pressing enter will allow you to edit the user’s Profile screen.
- **E(X)it:** Type in “X” and pressing enter will exit you from the screen and not save your changes.
- **Item#:** Type in the line **item #** and pressing enter will allow you add/edit/change that field number.

## Option Screen “S2”

### User Passwords

```

AUTOPOWER
06/03/2015   Operator/Salesperson/Mechanic File Maintenance - #2   AR-HSFH

Operator/Salesperson/Mechanic No... 0 - JOHN SMITH
!_____ Passwords _____!
1) File Maintenance ..... #
2) Price Change Authorization ..... #
3) O/E Credits Entry ..... #
4) Credit Hold Release ..... #
5) Change O/E Salesman No ..... #
6) Sales Order Cancellation ..... #
7) Special Order Cancellation ..... #
8) Edit/Remove Sales Tax ..... #
9) Warranty Returns ..... #
10) Void an Invoice ..... #
11) AutoMail ..... #
12) Timeclock ..... #
13) EzWriter ..... #
14) Transfer Parts for Inventory ..... #
15) Edit Average Cost..... #
16) RMA Credit Memo Authorization ..... #
17) Product Pricing F/M Access..... #
18) Delete a PO..... #
Options: (U)pdate, (E)dit, (DELETE), (S1), (P)rofile, E(X)it, Item#:
  
```

### Field Descriptions

1. **File Maintenance Password:** If this user is authorized to make file data changes throughout the system, then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.
2. **Price Change Authorization Password:** If the user is authorized to change selling prices in order entry, then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.
3. **O/E Credits Entry:** If the user is authorized to enter credits for returned goods in order entry, then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.
4. **Credit Hold Release Password:** If this user is authorized to release orders on credit hold then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.
5. **Change O/E Salesman No.:** If this user is authorized to change the salesman number assigned to the sales order in order entry, then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.

- 6. Sales Order Cancellation:** If this user is authorized to cancel a Sales Order, then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.
- 7. Special Order Cancellation:** If this user is authorized to remove a Special Ordered part from a sales order, then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.
- 8. Edit/Remove Sales Tax:** If this user is authorized to change or remove the sales tax from an invoice then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.
- 9. Warranty Returns:** If this user is authorized to enter Warranty Returns in order entry, then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.
- 10. Void an Invoice:** If this user is authorized to void an invoice produced today then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.
- 11. AutoMail:** If this user is authorized to conduct AutoMail Housekeeping then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.
- 12. Timeclock:** If this user is authorized to display their time clock punches, then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.
- 13. EzWriter:** If this user is authorized to access the EzWriter Report Builder then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.
- 14. Transfer Parts for Inventory:** If this user is authorized in the transferring of parts from branch to branch (STOCK TRANSFERS) then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.

**15. Edit Average Cost:** If this user is authorized to edit a Part's Average Cost field using the Product Master Record maintenance program, then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.

**16. RMA Credit Memo Authorization:** If this user is authorized to access the RMA (Return Material Authorization) Credit Memos then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.

**17. Product Pricing F/M Access:** If this user is authorized to access the Product Pricing F/M screen then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.

**19. Delete a PO:** If this user is authorized to delete a Purchase Order (PO) then type in a password containing up to 8 alpha-numeric characters and press **ENTER**. If not authorized, leave blank. If there is an existing entry in this field and you need to delete it, you can press the F4 function key to delete the entry.

## Options:

- **(U)pdate:** Type in “U” and pressing enter will update your inputs or edits to the salesman record.
- **(E)dit:** Type in “E” and pressing enter will allow you to edit all fields starting from the User's name and going from field to field allowing you to edit the field.
- **(D)elete:** Type in the word “DELETE” will allow you to delete the complete record.
- **(S2):** Type in “S2” and pressing enter will display the screen number two so that you may enter or edit the User's passwords.
- **(P)rofile:** Type in “P” and pressing enter will allow you to edit the user's Profile screen.
- **E(X)it:** Type in “X” and pressing enter will exit you from the screen and not save your changes.
- **Item#:** Type in the line **item #** and pressing enter will allow you add/edit/change that field number.

## Setting up a User's Login Profile

From the Main Menu > Click on Utility Programs Menu > Click on Login User F/M

The Login User File Maintenance screen will display as shown below.

LOGIN ID.....: JSMITH		** NEW ITEM **	
1. Operator Number.....: JS	19. Cust F/M Priv Lvl: 1	20. Scroll Alert BAMS: Y	21. Sales History O/E: Y
2. Printer Group.....: DEFAULT	22. Collection Notes.: Y	23. Remote Login.....: Y	24. AutoCat Style.....
3. Start-Up Menu.....: MAIN	25. Access Payroll....: N	26. Access BPRO.....: Y	27. Admin HomePage....: Y
4. Spooler Access.....: Y	28. GUI System.....: Y	29. Menu Shortcuts....: Y	30. OE Price Changes.: Y
5. File Maintenance.....: Y	31. Menu Buttons Pos.: :	32. Gui Font Size.....	33. Admin News.....
6. Enter Credit Memo's...: Y	34. Password Required:	35. Is a Manager.....: N	36. Show CritNotes....: N
7. Release Credit Holds...: Y			
8. Time Clock Manager....: YA			
9. Stock Adj. Branches...: W1			
10. Inventory Branch.....: W1			
11. Department Number....: 1			
12. ARBy Access.....: Y			
13. Add New Account in O/E: Y			
14. Can Access TCL.....: Y			
15. Credit Hold Que Name...: CH-QUE			
16. Alt. Menu Profile.....			
17. Allowed to see cost...: Y			
18. Branch Entry in O/E...: Y			

Options: (U)pdate, (E)dit, (S)M-FM, (D)elete, E(X)it, #:

### Field Descriptions

**Login ID** Type in the User's Login ID (Uppercase) and press **ENTER**.

**1. User Number:** Type in the User's Operator Number and press **ENTER**.

**2. Printer Group:** Type in the Printer Group to be assigned to this User and press **ENTER**. This group name associates the Printers to be used by the User.

**3. Start Menu:** Enter the Start Menu. Type in the highest starting menu for this user and press **ENTER**. Example: MAIN or COUNTER. Custom menus for the Users can be setup using AutoPower Menu Utilities.

**4. Spooler Access:** Type in **Y** if this user should have access to the Printer Spooler and press **ENTER**.

**5. File Maintenance:** Type in **Y** if this user is allowed to perform file maintenance and press **ENTER**. File Maintenance Passwords must be entered (See User Password section of this manual).

**6. Credit Memo's:** Type in **Y** if this user is allowed to enter credit memos and press **ENTER**.

**7. Release Credit Holds:** Type in **Y** if this user is allowed to release sales orders placed on credit hold and press **ENTER**.

**8. Time Clock Manager:**

- Enter "N", "YN", YB" or "YA" for timeclock access / editing.
- Enter N if this user does not have timeclock access.
- Enter "YN" if the user has timeclock access but he cannot edit the timeclock entries.
- Enter "YB" if the user can access the timeclock menu for his branch and edit the timeclock entries.
- Enter "YA" if the user can access the timeclock menu for all branches and edit entries.

**9. Stock Adj. Locations:** Type in the allowable branch location where stock adjustments can be performed, separated by commas, or ALL and press **ENTER**.

**10. Inventory Branch:** Type in the user's default inventory branch E.g., W1 or W2, so forth and press **ENTER**.

**11. Department Number:** Type in the user's default department number or '?' for choices and press **ENTER**.

**12. ARBY Access:** Type in (Y/N) if this user is allowed to use the ARBy report writer program and press **ENTER**. ARBY is Access Report Builder. The user can have the ability to create a wide variety of reports or display of information found in virtually any data file, whether it is inventory, purchasing, sales history or accounting files.

**13. Add New Account in O/E:** Type in if this user is allowed to add new customer accounts in O/E and press **ENTER**.

**14. Can Access TCL?** Type in (Y/N) if this user can access Terminal Command Level and press **ENTER**. Everyone should not have access to this utility.

**15. Credit Hold Que Name:** Type in the credit hold queue "CH-QUE" for the storage of sales orders placed on credit hold and press **ENTER**.

**16. Alt. Menu Profile:** What is this user's menu profile? Your system may have multiple menu profiles setup for your users. Example, counter men, accounting, purchasing and so forth. You may have only a select few users that have access to the Payroll menu WHILE the other users would not logon to this menu. These Menu Profiles are setup during the initial installation of your system.

**17. Allowed to see cost?** Type in **Y** if this user is allowed to view part number cost and press **ENTER**.

**18. Branch Entry in O/E:** Type in the Branch Location ID; ex: W1, used at the start entry of a sales order in O/E and press **ENTER**.

**19. Cust F/M Priv Lvl:** (Future Use)

**20. Scroll Alert BAMs:** (Future Use)

21. **Sales History O/E:** Type in **Y** if this user can view the customer sales history during Order Entry process and press **ENTER**.
22. **Collection Notes:** Type in **Y** if this user can access customer's collection notes from within Order Entry and press **ENTER**.
23. **Remote Login?: (No longer used)**
24. **AutoCat Style:** AutoCat menu style (1=Wrenthead, 2=Activant). Skip if Autocat is not used.
25. **Access Payroll:** Type in (Y/N) if this user is allowed to access the Payroll Account module and press **ENTER**.
26. **Access BPRO:** Type in (Y/N) if this user is allowed to access the BusinessPro Accounting module and press **ENTER**.
27. **Admin HomePage:** Type in (Y/N) if this user is allowed to perform Administration functions on the Home Page and press **ENTER**.
28. **GUI System:** Type in (Y/N) if this user will be using the new GUI application and press **ENTER**.
29. **Menu Shortcuts:** Type in (Y/N) if this user is allowed to enter Menu Shortcuts and press **ENTER**.
30. **OE Price Changes:** Type in (Y/N) if this user is allowed to make price changes in Order entry using the "P" option and press **ENTER**.
31. **Menu Buttons POS:** Show Menu Buttons at TOP, BOTTOM, RIGHTSIDE of the Menu Screen.
32. **GUI Font Size:** Type in the preferred GUI App Font Size: 8,9,10,11,12,14 and press **ENTER**.
33. **Admin News:** Type in (Y/N) if this User can Administer Company News found on the GUI Menu? and press **ENTER**.
34. **Password Required:** Type in (Y/N) if this user is required to enter their User # and Password? and press **ENTER**.
35. **Is a Manager:** Type in (Y/N) if this user is a Manager having special privileges? and press **ENTER**.
36. **Show CritNotes:** Type in Y/N if this user can display any part number's critical notes and press **ENTER**.

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