

How To Setup A New User

Summary

Disclaimer: This applies only to Enterprise customers.

When a new employee joins your company, you'll need to setup a new user within the system before he/she can begin using it.

Step-by-Step Guide

Administration	Users - Setup				
Choose Company	Superuser	Mobile Us	er 🗌 S	upport User	
Exchange Rates and Indexes	User Code	Viedeur Arreust			
System Initialization	User Name	VINDOWS ACCOUNT			
	Employee			•	(3)
7 Setup	E-Mail				
Contral General	Mobile Phone				[
	Mobile Device ID				[
Users 🔤	Fax				
User Defaults	Defaults				
	Branch		Main	•	
Sales Employees/Buyers	Department		General	•	1. 20
Territories	Password		Location		
Commission Groups	Password Never	Expires			
Predefined Text	Change Passwor	d at Next Logon			
Reference Field Links					
E Freight					
Report and Layout Manager					
🔲 Dashboard Manager	ОКС	ancel Copy	Form Settings	Send Mobile Setti	g

2. Fill in all the information listed, especially User Code, User Name, E-Mail, and Location*



Users - Setup			
Superuser	Mobile Use	er	
User Code		EXAMPLE	
Bind with Microsoft Wind	dows Account		
User Name		Example User	
Employee			• 🗉
E-Mail		Example@brewery.com	
Mobile Phone			
Mobile Device ID			
Fax			
Defaults			
Branch		Main	Ŧ
Department		General	•
Authorization Groups			
Language			•
Password		****	
Password Never Exp	ires	Locatio 1	•
<u>Change Password at</u> <u>Locked</u>	Next Logon		
Add Canc	el Copy	Form Settings	

- 3. Example:
- 4. Click the button next to the Password field to set the user's password
- 5. Click the Add button on the bottom
- 6. In the Employee Tab, you can optionally create an Employee Master Data for the user to hold

HR information, which you can then associate with the new user.

1. This is located in Human Resources->Employee Master Data (Switch to Add mode with

Banking		Employee Master Data							
Inventory		First Name			Empl	over No.	90		
Production		Middle Name			Ext. Employee No.				
MDD		Last Name				ctive Employe	•		
TRP		Job Title							
Service		Position Department		•	Office Phone Ext.				
Human Resources				*					
		Branch		*	Mobi	e Phone	1		
Employee Master Data		Manager			Page	-			
Human Resources Reports		Jser Code		-	Home	Phone		100	
OBeer Advanced QC		sales cilipioyee			E-Ma	Aail	-		
Interfaces		Address	Membership	Administ	ration	Personal	Figance	Remarks	Attaghment
Utilities		Work Address				Home Ad	dress		
o cincles									
E Reports		Street				Street		1	
		Block Building/Floor/Room Zip Code City County				Block			
					Building/Fl Zip Code		loor/Room		
						City County			
		State		▼ Stat		State	te		
		Country		* Country		Country			



You new user should now be setup.

Note: Before they can access the software, they will need a license. See this <u>Quick Note</u> for more details.

*For some customers, you will need to set the Bind with Microsoft Windows Account. You will know that this is a requirement when you login and get a "**Current MS Windows account is not bound to any specified company on specified server**." error.

If you see that message, you have to enter in the Orchestrated username after one of the two following:

- Orchprod\
- Orchestrasw\

For example:

- Orchprod\jeffm
- Orchestrasw\jeffm

Please note that it will be one OR the either, but not both.

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