

How to create a User

Enter the system with an 'administrator' role.

Create a Business Partner (bp)

Enter the Search Key and Name fields.

Business Partner

Inserted

Client*	Demo
Search Key	John Smith
Name*	John Smith
Name 2	
Reference No	
Credit Status	Credit OK

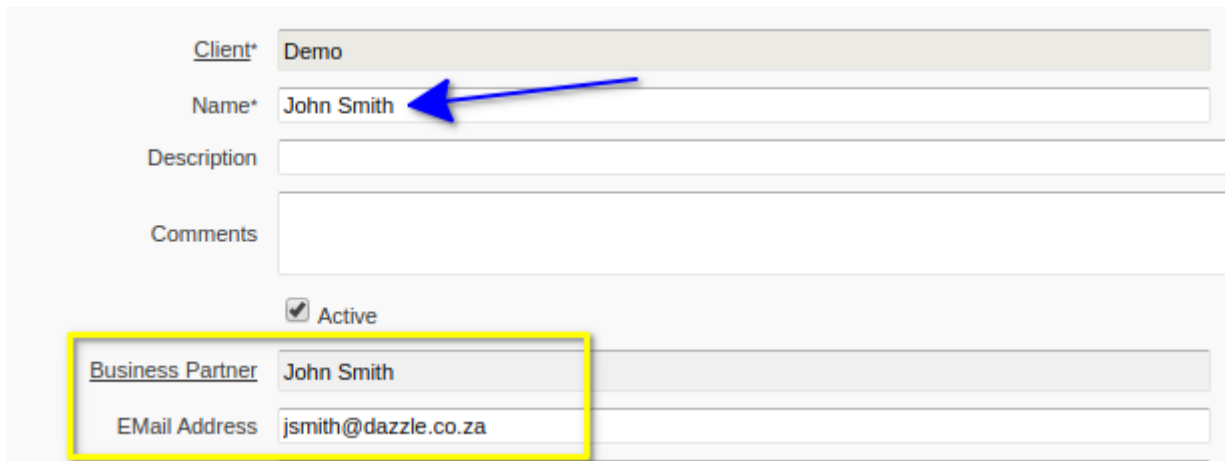
Then choose the bp group and tick the Employee and Sales Representative boxes. Then save the record.

Organization*	*
Business Partner Group*	Employee
Rating	
Credit Limit*	0.00
<input type="checkbox"/> SO Tax exempt	<input type="checkbox"/> PO Tax exempt

Logo	<input type="checkbox"/>
<input type="checkbox"/> Customer	
<input checked="" type="checkbox"/> Employee	
<input checked="" type="checkbox"/> Sales Representative	
Representative/Agent	Yogan
Open Balance	
URL	
<input type="checkbox"/> Summary Level	

Create the User

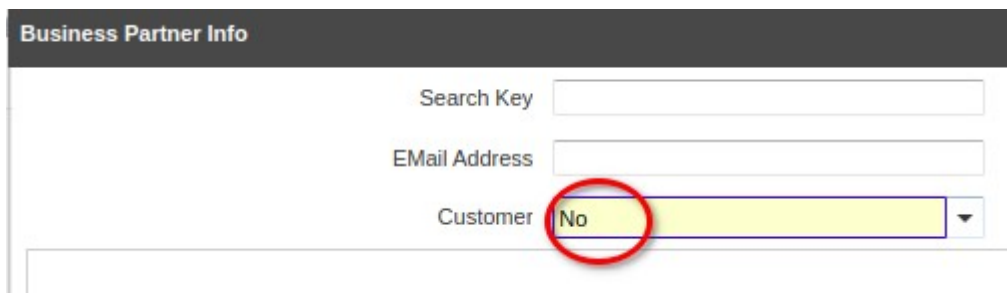
Enter the Name, bp and email address.



A screenshot of a user creation form. The form includes the following fields and elements:

- Client***: Demo
- Name***: John Smith (indicated by a blue arrow pointing to the text)
- Description**: (empty)
- Comments**: (empty)
- Active**
- Business Partner**: John Smith (highlighted with a yellow box)
- E-Mail Address**: jsmith@dazzle.co.za (highlighted with a yellow box)

When choosing the bp, ensure the 'Customer' field is marked as 'No' or is blank.



A screenshot of the 'Business Partner Info' form. The form includes the following fields and elements:

- Search Key**: (empty)
- E-Mail Address**: (empty)
- Customer**: No (circled in red)

Save the record and then enter a password for this user.



A screenshot of the password entry section of the form. It includes the following fields and elements:

- Partner Location**: (empty)
- Password**: (masked with dots, indicated by a blue arrow pointing to the dots)

If you require the same user to access other clients then ensure the email address and password details are the same as the other client's user record.

If the user requires to send emails from the system then enter details into the following fields under the 'Internal' section of the 'User' record. Consult your Dazzle support representative for further information.'

Internal

EEmail User ID

EEmail User Password


From the 'User' record go into the 'User Role' sub-tab.

User Contact > User Roles

Inserted

Client*	Demo
User/Contact*	John Smith
Role*	Demo Admin

Active



Then choose the role you require and save the record. You may create more than one role for a user.

Some roles require a configuration on the user record for access to certain organisations within a client. In which case go into the 'Org Access' sub-tab and choose the organisation/s that the user has access to.

Organization*

Jhb

*

Bloem

Cpt

Dbn

Jhb