Knowledgebase Article

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Article ID: 4197
Subject: Setting up User Accounts/Permissions in Pro Gold i2 3.xx
Last Modified: July 28, 2009

Applies to: Pro Gold i2 3.xx

Purpose: Access to certain areas of the system can be limited in Pro Gold i2. When a User ID is set up, a user can have access to the entire program, or certain parts. Once a user profile is setup, the user will login to Pro Gold i2 with a username and password that will determine what parts of the program they can access.

Procedure: Below are the steps to setup security settings and create user accounts in Pro Gold i2.

- **Step 1: Enter a Password on the Super account**
  - The **Super** login is the default master ID
  - By default, there is no password assigned to the **Super** account
  - <u>A password should be assigned and given only to those users who should have unrestricted access to Pro Gold i2</u>
  - At the **Main Menu**, select the **Settings and Utilities** option and click on the **Company Defaults** icon
  - Select the **Security Tab**
  - Verify that **Supe**r is listed in the **User Name** field
  - Click **Change Password** button
  - Enter the desired password in the field
  - Click **Ok** button
  - Logout and log back into Pro Gold i2 to verify new password

- **Step 2: Create a New User Account**
  - User accounts are necessary when a Pro Gold user has restricted access within the program
  - At the **Main Menu**, select the **Settings and Utilities** option and click on the **Company Defaults** icon
  - Select the **Security Tab**
  - Click **New User** button
  - Enter a name for the user profile in the **User Name** field
    - Recommend using the position/billet name for the user name versus using a person's name (Example: Front Desk)
    - If there is a personnel change, the password can simply be reset
  - Click the dropdown box in the **Select Area** field
  - The system will prompt to assign a password for the new account
    - Enter a password in the **Enter New Password** screen (System is not case sensitive)
  - Click the **OK** button to assign the new password and close the **Enter New Password** screen

- **Step 3: Assign Tab Access (Select Areas of use Within Pro Gold i2)**

<u>**Assign Tabs**</u>

  - Use the **Select Area** dropdown to assign the areas in Pro Gold i2 that the user will access
    - **Note**: If a user needs access to more than one tab, then <u>each tab needed must be selected and added to the **Areas Allowed** list of the user account</u>
    - Some areas (i.e., Tabs) can also be restricted by office and contain and office selection option
    - See below for important information on certain **Select Area** options
  - Click the **Add** button to add the entry to the **Areas Allowed** list
  - Finish adding all of the areas for access to the user account
    - To remove an access area, highlight the option and click the **Remove** button

- Click the **Save User** button to save the profile

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Tab Areas Available The following areas are available in Pro Gold i2:

- Accounting Tab
- Accounts Receivable Tab (Full) *
- Accounts Receivable Tab (Restricted) *
- Banking Tab #
- Contact Mgmt. Tab *
- Payroll Tab
- Property System Tab (Full) * #
- Property System Tab (Read Only) * #
- Property System Tab (Restricted) * #
- Setup Tab (Full)
- Setup Tab (Restricted)
- Vendors and Payables Tab (Full) *
- Vendors and Payables Tab (Restricted) *

* These areas can also be restricted by office (Requires more than one Non Co-op office to be established in Pro Gold i2)

Do not assign an office record to **Property System Tab** options if user uses escrow banking

Tab Permission Options **Select Area** Options

- **Accounts Receivable Tab**
  - **Full**: Full access to the **Accounting => Customers Menu**
  - **Restricted**: Limited to certain areas under the **Accounting => Customers Menu** :
    - No access to the **Terms and Balances Tab** within the customer record
    - No access to the following icons: **Assess Finance Charges**, **Batch Posting**, **Receive Payments**, **Print Statements**, and **Issue Credit Memo**
  - **Office**: Can access all **Normal** customer records and records that have no office assigned (i.e., **Not Assigned** Office); Can only access **Agent** customer records for the office that is assigned (Can assign more than one office)
- **Banking Tab**
  - When the **Banking Tab** is selected, a bank account must also be assigned.
  - If the user is to be given access to multiple bank accounts, the **Banking Tab** must be added with each bank account. (i.e.: For 2 bank accounts, the **Banking Tab** would be added to the user account twice; one entry with each bank account assigned.)
  - **Note**: Do not assign an office record to the **Property System Tab** options if the user account uses escrow banking

- **Contact Mgmt. Tab**

  - **Office**: Can access contact records that have no agent assigned and contact records for the office that is assigned to the user account (Can assign more than one office)

    - **Note:** User account should have same office(s) assigned under the **Contact Mgmt. Tab** as they do under the **Property System Tab** option

- **Property System Tab**

  - **Full**: Full access to the **Transactions Menu**

  - **Restricted**: Limited access in the **Work with Properties** icon (no commission details or commission tree access) All other

  - **Read Only**: Limited access to the **Transactions Menu: Work with Properties** is **Read-Only** access (showings and marketing can be edited), **Property Reports**, **Batch Marketing** and **Checklist Calendar** icons

  - **Office**: Can only access the property records for the office that is assigned (Can assign more than one office)

    - Assigning an office to the user account, removes access to the **Agent Deductions**, **Company Deductions** and **Commission Plan** icons on the **Transactions Menu** and the **Commission Tab** of the **Agent Information** icon

    - **Note 1**: Do not assign an office record to the **Property System Tab** options if the user account uses escrow banking

    - **Note 2**: User account should have same office(s) assigned under the **Property System Tab** as they do under the **Contact Mgmt. Tab** option

- **Setup Tab**

  - **Full**: Full access to the **Settings and Utilities Menu**; allows user account the ability to create/view user accounts/permissions (Security)

  - **Restricted**: Access to the **Settings and Utilities Menu**, except the ability to create/view user accounts/permissions (Security)

- **Vendors and Payables Tab**

  - **Full**: Full access to the **Accounting => Vendors Menu**

  - **Restricted**: Limited access to certain areas under the **Accounting => Vendors Menu**:
    - No access to the following icons: **Work with Vendors**, **Accounts Payable**, and **Batch Posting**
    - **Enter and Pay One Bill** icon: Can view, approve and print bills (Note: If bill is not posted, user account can edit Vendor, Terms, Invoice Date, Invoice #, Due Date and Invoice Amount fields)

    - **Pay Multiple Vendors** icon: Can only view bills

  - **Office**: Can access bills that have no office assigned (i.e., **Not Assigned** Office) and any bills for the office that is assigned (Can assign more than one office)

- **Reports**: Users are not automatically granted access to reports. Reports must be granted to a user individually through the "Manage Reports" option. For more information, refer to Knowledge Base Article 4198.

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References: Below is a link you can use to access Enhancement HelpNet Center resources, which includes the Knowledge Base Article (KBA) Library, Pro Gold i2 Documentation, and Training Webcasts:

http://secured.progoldi2.com/webcast.aspx

- The Enhancement HelpNet links are located on the right side of the web page.

Related articles: 4198

Keywords: ID Accounts, Login, Permissions, Security, Sign in, User Access, 4197