

PRO GOLD XP Knowledge Base Article

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Article ID: 4199
Subject: Setting up User Accounts/Permissions in Pro Gold XP 2.0
Last Modified: August 18, 2008

Applies to: Pro Gold XP 2.0

Issue: Access to certain areas of the system can be limited in Pro Gold XP. 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 XP with a username and password that will determine what parts of the program they can access.

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

- “Super” account
 - Note: The “Super” login is the default master ID. By default, there is no password assigned to the “Super” account. A password should be assigned and given only to those users who should have unrestricted access to Pro Gold XP.
 - Select the **Setup Tab** and click on the “**Change Company Info**” icon.
 - Select the **Security Tab**.
 - Verify that “Super” is listed in the “**User Name**” field.
 - Click “**Change Password**”.
 - Enter the desired password in the field.
 - Click “**Ok**”.
- Create a New User Account
 - Select the **Setup Tab** and click on the “**Change Company Info**” icon.
 - Select the **Security Tab**.
 - Click “**New User**”.
 - Enter a name for the user profile in the “**User Name**” field.
 - **Note:** It is recommended to use 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 “**Change Password**” and enter the password that will be used for the user name.
 - Use the “**Area**” drop down to select areas of Pro Gold XP that the user will be able to access.
 - **Note:** If a user has access to more than one tab, then each tab must be selected and added to the user account.
 - See below for important information on certain “Select Area” options.
 - A new line will appear to select another area of access.
 - Finish adding all of the areas for access to the user account.
 - To remove an access area, click the **red “x”** next to the option.
 - Click “**Save User**” to save the profile.
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- “**Select Area**” Options
 - 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. (IE: For 2 bank accounts, the Banking Tab would be added to the user account twice; one entry with each bank account assigned.)

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Knowledge Base Article

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- Property System Tab
 - **Full:** Full access to the property tab, including property information, deduction, commission plan and agent setup, and commission processing.
 - **Note:** If a user is not given access to the Setup Tab, they will have limited access to certain options in the Properties Tab- Work with Properties full access, Property Reports, Batch Marketing and Check List Calendar.
 - **Restricted:** limited access to the Property tab- Work with Properties limited access (no commission details or commission tree access), Property Reports, Batch Marketing and Checklist Calendar.
 - **Read Only:** limited access to the Property tab- Work with Properties Read-Only access (showings and marketing can be edited), Property Reports, Batch Marketing and Checklist Calendar.
- Setup Tab
 - Full: full access to the Setup Tab.
 - Restricted: access to all of the Setup Tab, except the ability to edit/view user accounts/permissions (Security).

References: Below is a link you can use to access Enhancement HelpNet Center resources, which includes the Knowledge Base Article (KBA) Library, Pro Gold XP 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: User access, ID Accounts, Security permissions, 4197