Knowledgebase > SalesPad > System > System User Card

System User Card

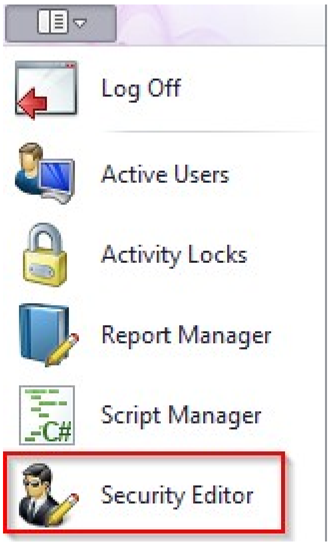
Megan De Freitas - 2024-11-22 - System

Overview

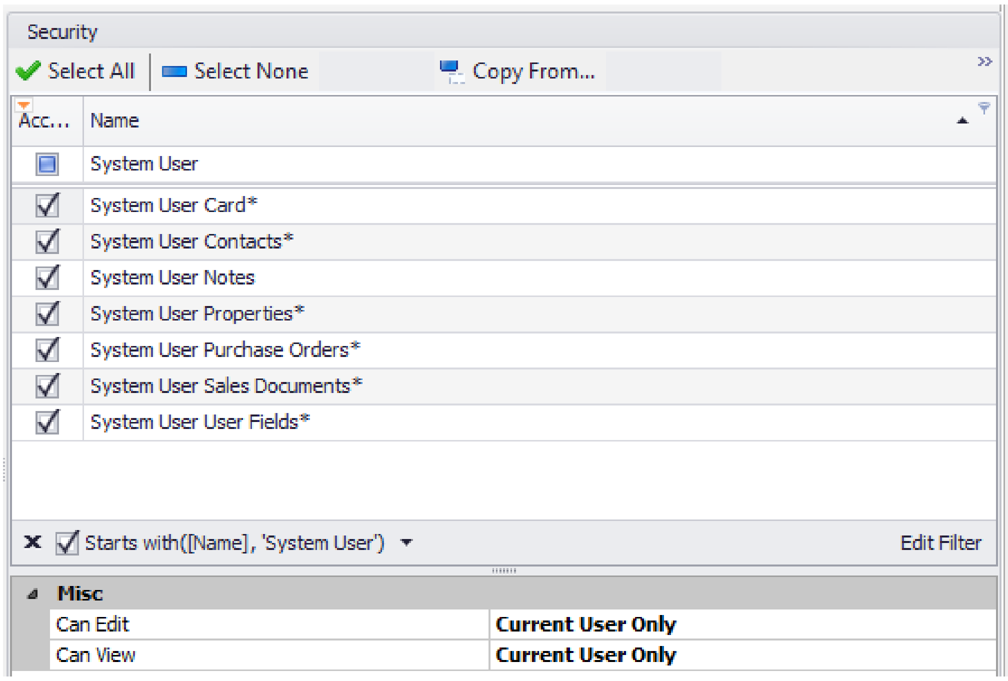
The System User Card gives users easy access to recent documents or contacts that they have created or their Sales Representative may have created. The card is also beneficial for Administrators by allowing them to monitor and view permissions of users based on UDFs. Additionally, there is a Notes tab and User Defined Fields can be added for holding additional information for individual users.

Click here to download a Quick Report that you can use to load all the current system users.

Security

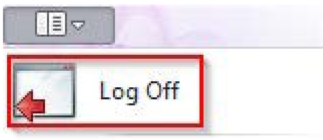
1. To enable the System User card, go to the Security Editor and enable the appropriate modules


2. Type in System User to bring up all of the Securities relating to the System User Card



3. For changes to take effect, click **Save** in the Action Toolbar

4. Then click **Log Off** from the **Administrative** dropdown



System User Card – Enables the System User Card screen

Can Edit and *Can View* each have three options: *ALL*, *Current User Only*, and *NONE*

- *ALL*- Every user in the current security group may edit/view any System User Card.
- *Current User Only* - Only the current user logged in can see their own System User Card, no other user in the current security group may edit/view their System User Card. This is the default sub- security.
- *NONE* - No user in the current security group may view ANY System User Cards.

System User Contacts **-** enables CRM Contacts on the System User Card

- *Can Export Grid* – Can export the grid for user contacts. Defaults to True**.**

System User Properties – Enables the System User Properties panel

- *Allows Screen Layout Customization* – Enables the user to change the screen layout.
- *Can Edit Default Warehouse* – Enables the user to switch warehouses.
- *Can Edit Sales Rep* – Enables the user to switch between sales representatives.
- *Can Edit Security Group* – Enables the user to edit security groups for users.
- *Can Edit Start Date* – Can change the start date for the user. All System User Properties sub-securities default to False.

System User Purchase Orders – Enables access to the Purchase Orders specific tab.

- *Can Export Grid* – Allows a user to export the grid of Purchase Orders. Defaults to True**.**

System User Sales Documents – Enables access to the Sales Documents specific tab.

- *Can Export Grid* – Allows a user to export the grid of Sales Documents**.** Defaults to True**.**

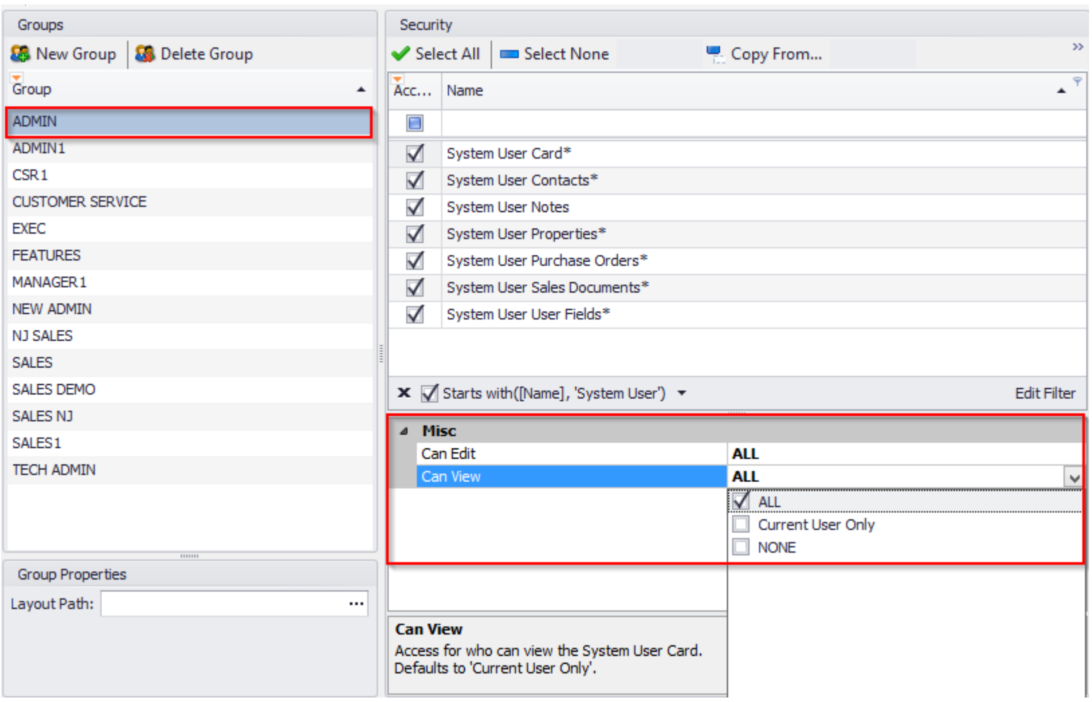
System User User Fields – Enables access to the User Fields specific tab.

- *Allow Layout Customization* – Disables/Enables access to layout customization. Defaults to False
- *Read Only* - Sets user fields to editable or not. Defaults to False

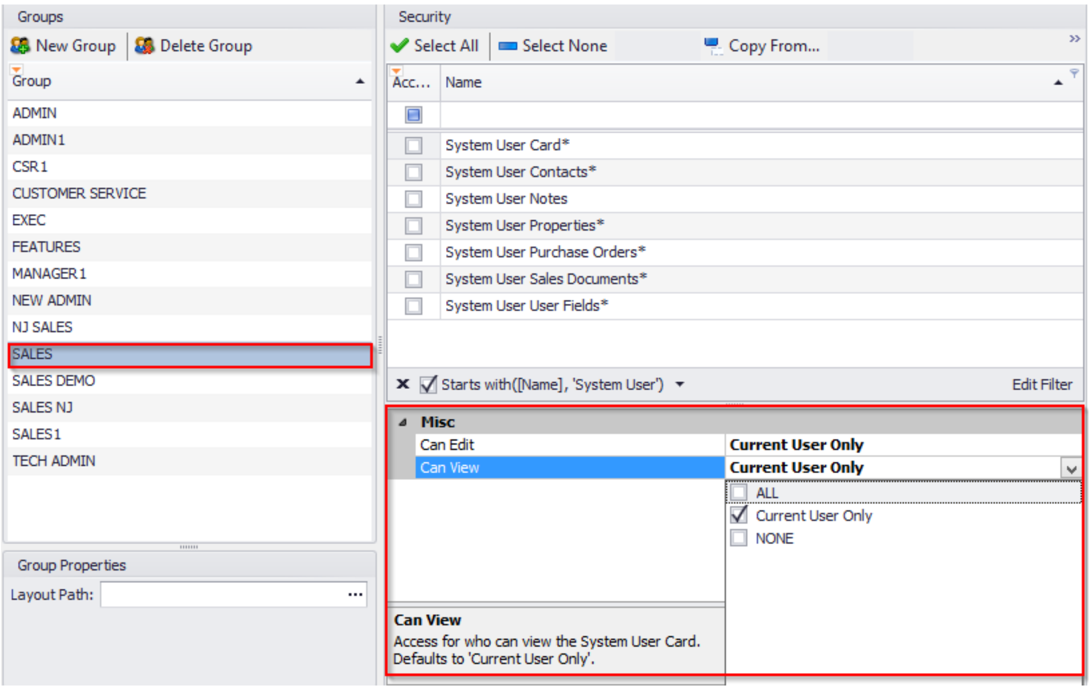
Example

Admins vs Sales groups

In this example, you can see that the Admin Security Group has *Can View* set to *ALL* which enables the admin to edit and view any user's access on the System User Card**.**



In the Sales security group, you can see that users in the Sales security group only have the ability to see their own System User Card**.**



Locks

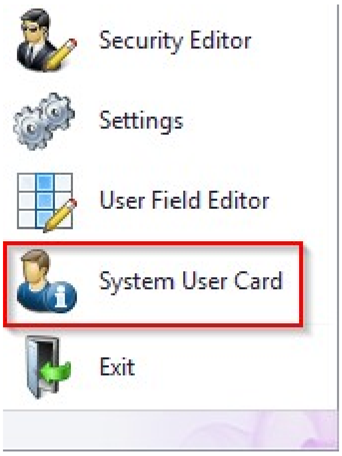
There are Locks for the System User Card, so if another user is currently viewing a card then the System User Card will be locked by that user and will be Read Only for other users.

System User Card

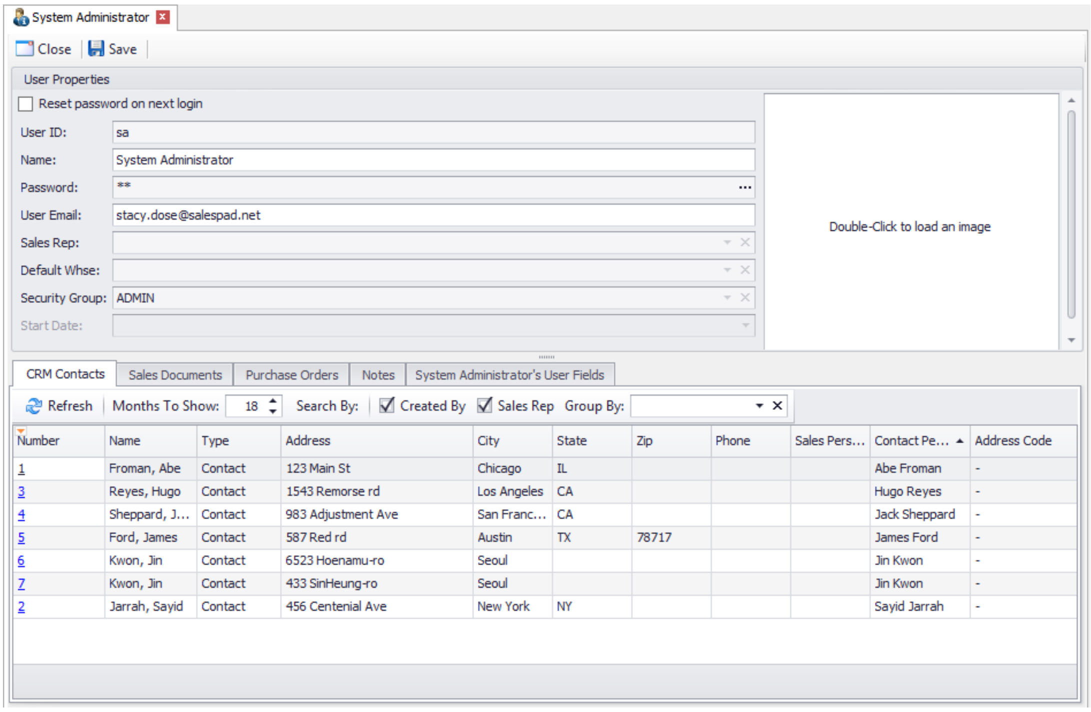
Usage

The System User Card is a main menu option. The icon will show the current users avatar.

1. Click the **Administrative** dropdown and select System User Card to access the card

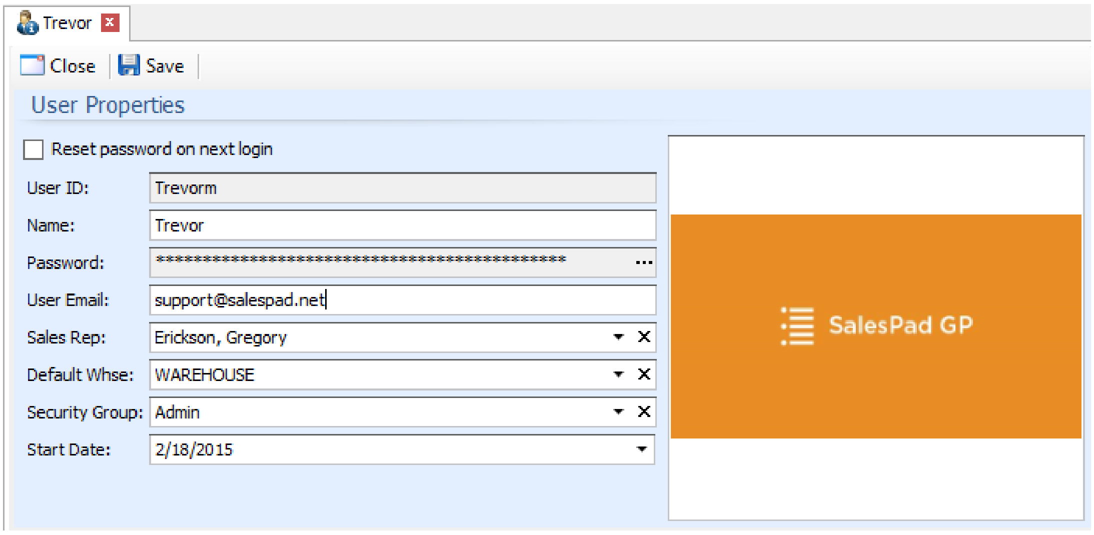


This will open the "System Administrator" screen.



Properties

User Properties allows the user to edit and view their information. The image field allows the user to set a unique avatar, which will appear in the main menu dropdown for their System User Card.



User ID: Shows the user logged

Name: Shows the display name for the user

Password: The password for the user

User Email: Email for the user

Sales Rep: Shows any Sales Representatives assigned to the user. Can be changed to different representatives

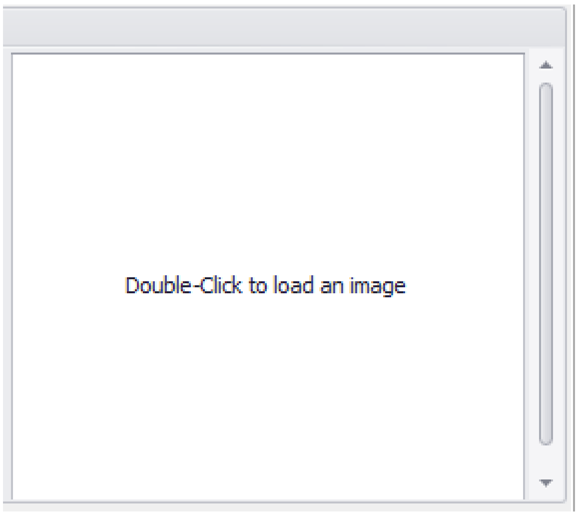
Default Warehouse: Allows the user to set a default Warehouse

Security Group: Shows the Security Group that the user is located in

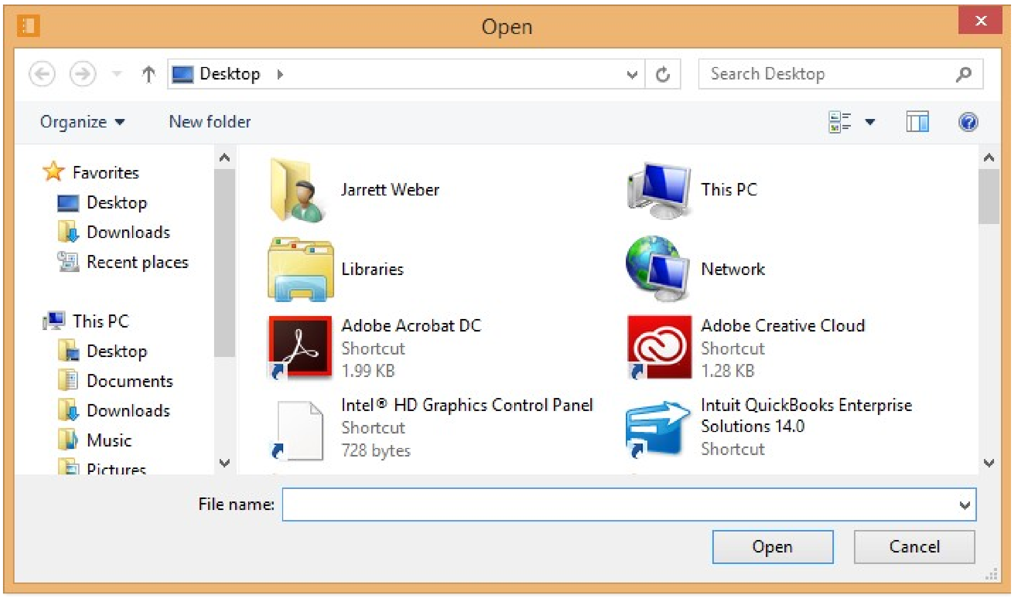
Start Date: Shows the start date for the user

Image Panel

1. Double-click to open Windows Explorer



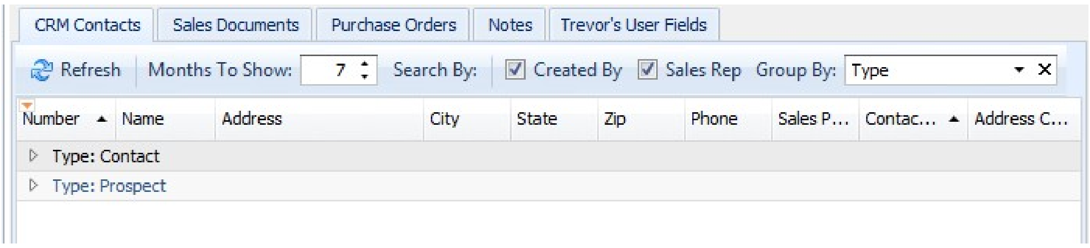
2. Select the file you would like and click **Open**



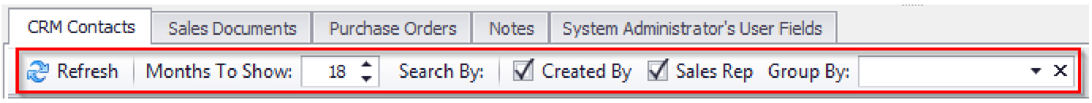
The image will appear in the panel.

CRM Contacts

The CRM Contacts tab shows any Contact or Prospect created by the user or the sales representative they are assigned to.



All of the System User Card specific tabs have their own Action Toolbar—CRM Contacts



Refresh – Reloads the grid

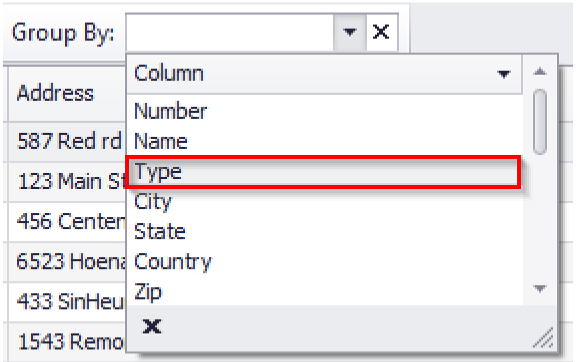
Months To Show: Shows the timeframe for documents

Search By: Provides different predefined filters

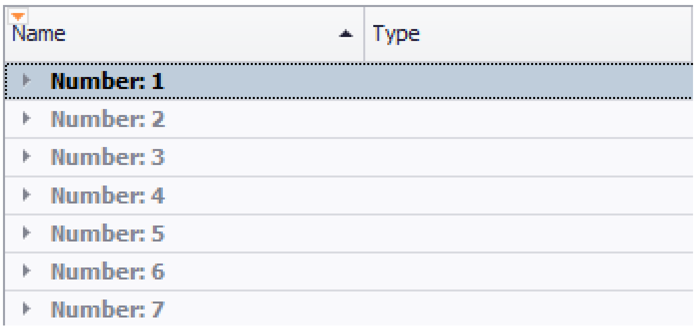
Group By: A simply tool for putting different criteria together

Group By Usage

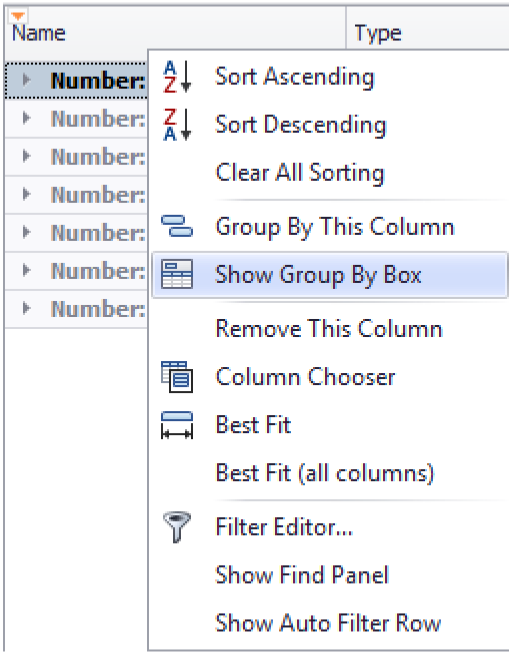
1. Select the category from the dropdown that you would like to Group By



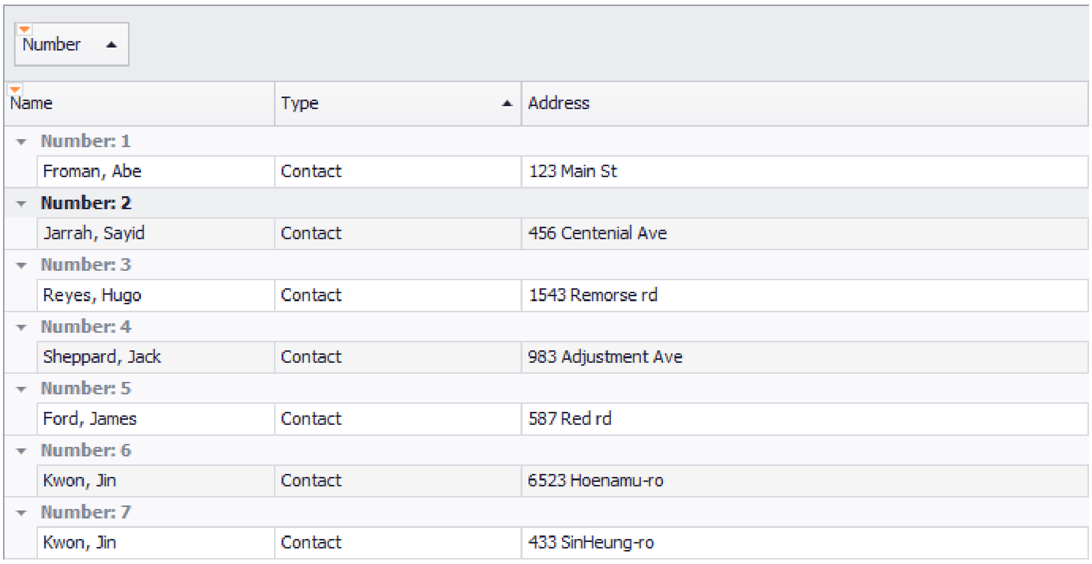
2. This example, has been grouped by Number. The screenshot below is what you will see when a Column is grouped:



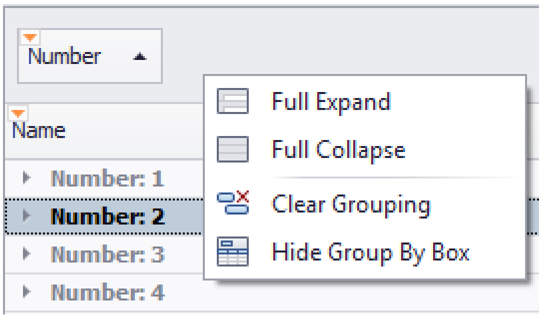
You can also select Show Group By Box to show the group criteria



This is what Group By Box looks like.

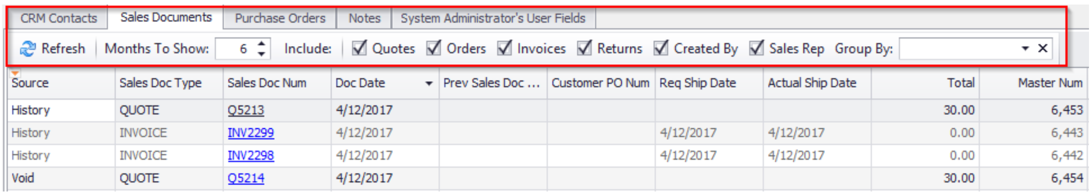


There are a few options such as Full Expand and Full Collapse that you can select. Here Full Collapse is selected. The screenshot under demonstrates a fully expanded screen.



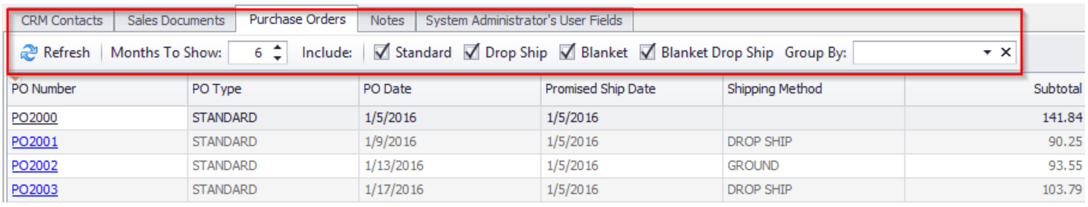
Sales Documents

The System User Sales Documents tab allows the user to see sales documents they have created or were created by the sales representative they are assigned to. Searching for sales documents is done similar to CRM Contacts.



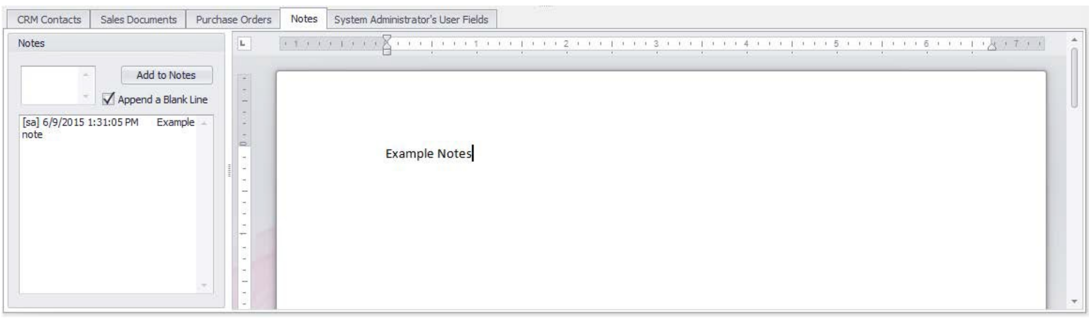
Purchase Orders

The System User Purchase Orders tab allows the user to see purchase orders they have created. Search for purchase orders using the same guidelines as searching for CRM Contacts.

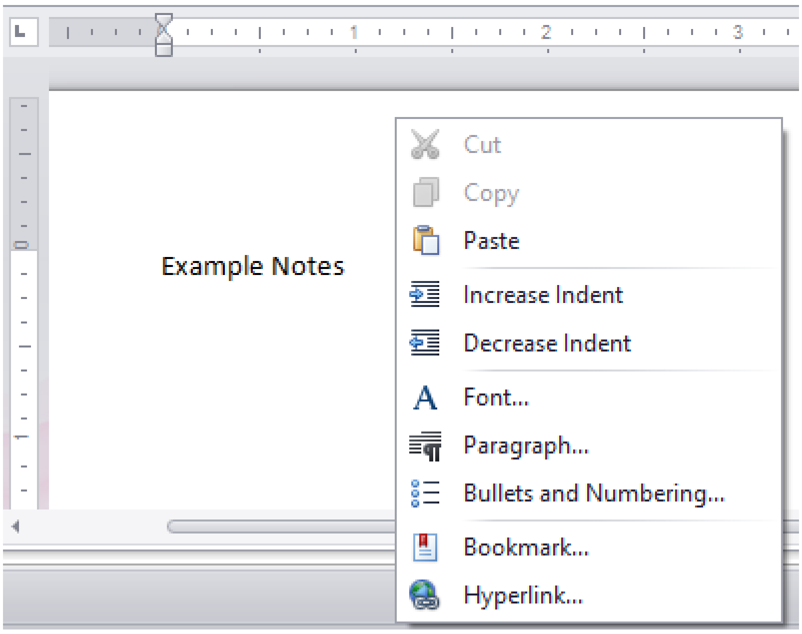


Notes

The System User Notes tab allows the user to keep notes for later usage.



The side panel is a rich text editor that can be modified similar to that of a word document.



User Fields

The System User User Fields specific tab shows UDFs for the System User. There is an option to allow individual UDFs to only be viewable by certain security groups. This allows Administrators to hide certain sensitive UDFs from specific groups. See SalesPad GP User Field documentation for more information.