



System User Card

Megan De Freitas - 2025-06-11 - System

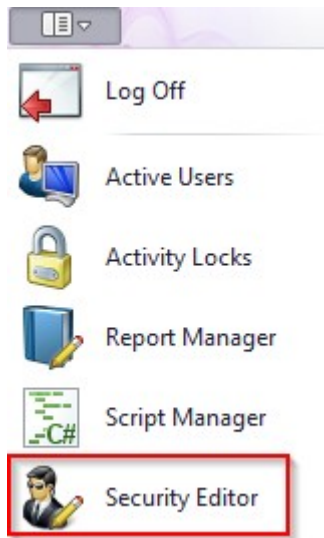
Overview

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.

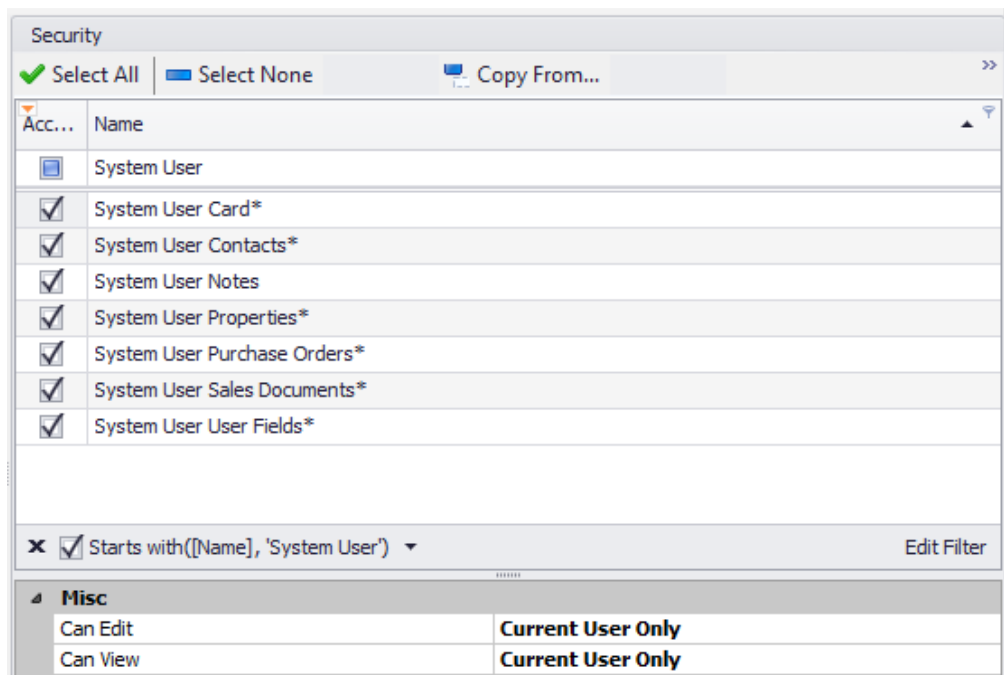
See the attachment at the bottom of this article for a Quick Report that you can use to load all the current system users.

Security

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



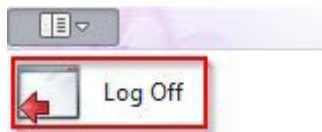
2. Type in System User to bring up all of the Securities relating to the System User Card



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.

The screenshot displays a security configuration window with two main panes. The left pane, titled 'Groups', lists various user groups, with 'ADMIN' highlighted by a red rectangle. The right pane, titled 'Security', shows a list of system entities with checkboxes for permissions. A filter is applied: 'Starts with([Name], 'System User')'. The 'Misc' section is expanded, showing 'Can Edit' and 'Can View' permissions, both set to 'ALL', which is also highlighted by a red rectangle. Below this, a 'Can View' tooltip explains the permission: 'Access for who can view the System User Card. Defaults to 'Current User Only'.'

Acc...	Name
<input checked="" type="checkbox"/>	System User Card*
<input checked="" type="checkbox"/>	System User Contacts*
<input checked="" type="checkbox"/>	System User Notes
<input checked="" type="checkbox"/>	System User Properties*
<input checked="" type="checkbox"/>	System User Purchase Orders*
<input checked="" type="checkbox"/>	System User Sales Documents*
<input checked="" type="checkbox"/>	System User User Fields*

Misc	
Can Edit	ALL
Can View	ALL

Can View
Access for who can view the System User Card. Defaults to 'Current User Only'.

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.

Groups

New Group

Delete Group

Group

ADMIN
ADMIN1
CSR.1
CUSTOMER SERVICE
EXEC
FEATURES
MANAGER.1
NEW ADMIN
NJ SALES
SALES
SALES DEMO
SALES NJ
SALES.1
TECH ADMIN

Group Properties

Layout Path:

Security

Select All

Select None

Copy From...

Acc...

Name

☐ System User Card*
☐ System User Contacts*
☐ System User Notes
☐ System User Properties*
☐ System User Purchase Orders*
☐ System User Sales Documents*
☐ System User User Fields*

Starts with([Name], 'System User')

Edit Filter

Misc

Can Edit

Can View

Current User Only

Current User Only

☐ ALL
☒ Current User Only
☐ NONE

Can View

Access for who can view the System User Card. Defaults to 'Current User Only'.

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.

Number	Name	Type	Address	City	State	Zip	Phone	Sales Pers...	Contact Pe...	Address Code
1	Froman, Abe	Contact	123 Main St	Chicago	IL				Abe Froman	-
3	Reyes, Hugo	Contact	1543 Remorse rd	Los Angeles	CA				Hugo Reyes	-
4	Sheppard, J...	Contact	983 Adjustment Ave	San Franc...	CA				Jack Sheppard	-
5	Ford, James	Contact	587 Red rd	Austin	TX	78717			James Ford	-
6	Kwon, Jin	Contact	6523 Hoenamu-ro	Seoul					Jin Kwon	-
7	Kwon, Jin	Contact	433 SinHeung-ro	Seoul					Jin Kwon	-
2	Jarrah, Sayid	Contact	456 Centennial Ave	New York	NY				Sayid Jarrah	-

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

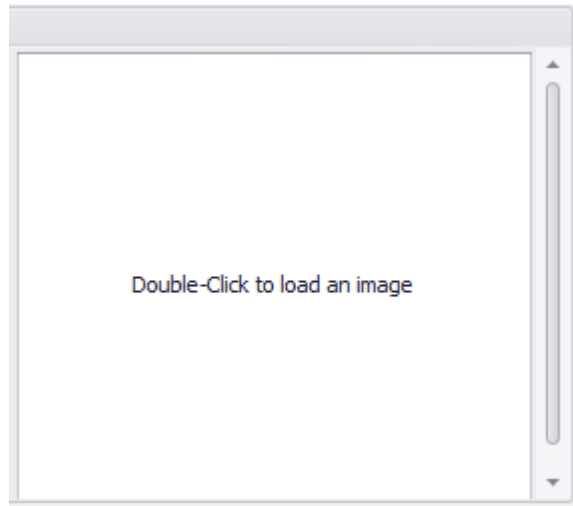
Default Warehouse: Allows the user to set a default Warehouse

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

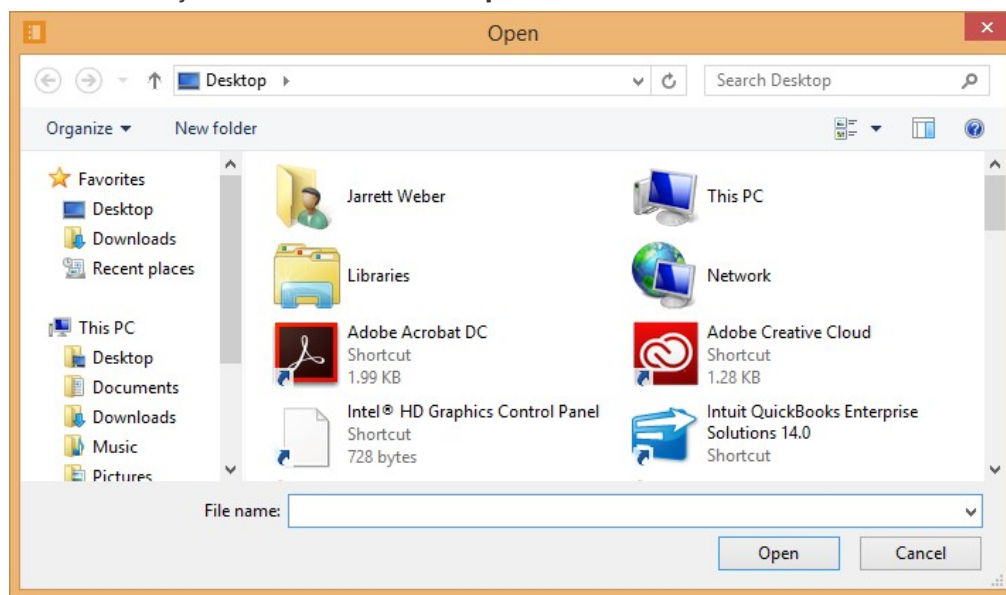
Start Date: Shows the start date for the user

Image Panel

1. Double-click to open Windows Explorer



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

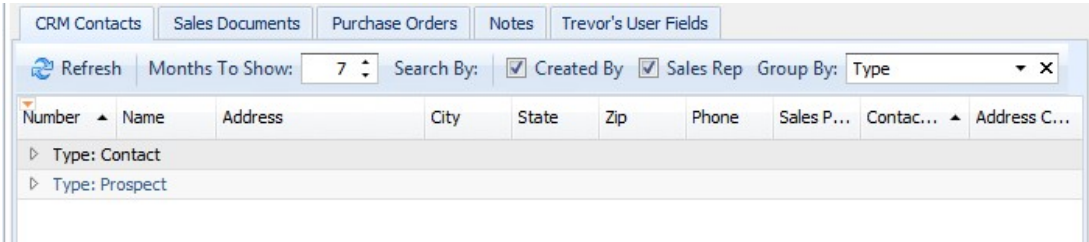


The image will appear in the panel.

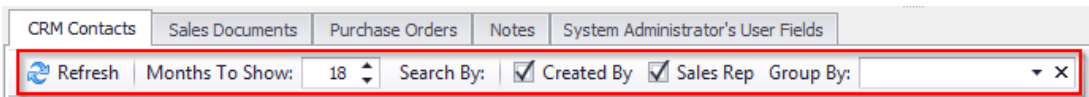


CRM Contacts

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

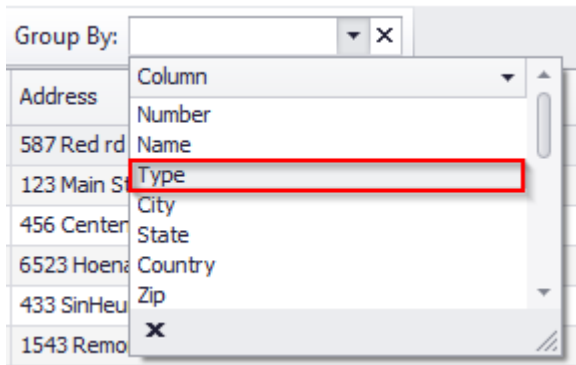
Months To Show: Shows the timeframe for documents

Search By: Provides different predefined filters

Group By: A simply tool for putting different criteria together

Group By Usage

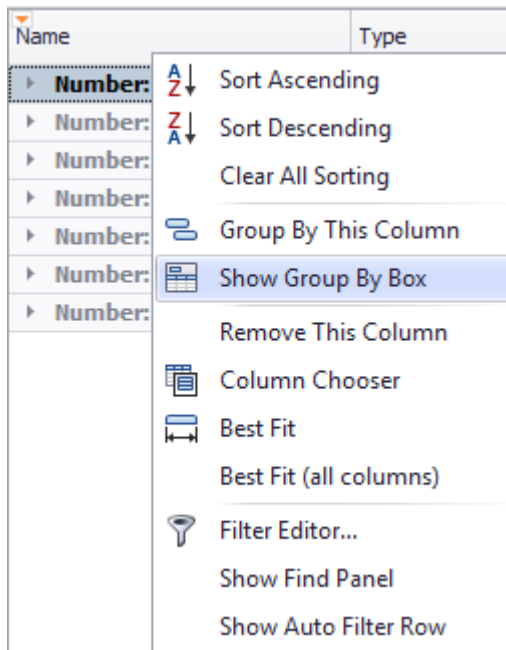
1. Select the category from the dropdown that you would like to Group By



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

Name	Type
▶ Number: 1	
▶ Number: 2	
▶ Number: 3	
▶ Number: 4	
▶ Number: 5	
▶ Number: 6	
▶ Number: 7	

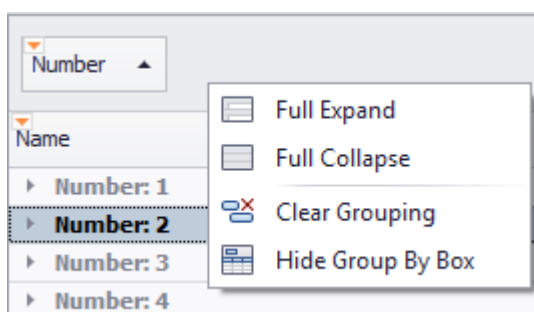
You can also select Show Group By Box to show the group criteria



This is what Group By Box looks like.

Number ▾		
Name	Type	Address
▼ Number: 1		
Froman, Abe	Contact	123 Main St
▼ Number: 2		
Jarrah, Sayid	Contact	456 Centennial Ave
▼ Number: 3		
Reyes, Hugo	Contact	1543 Remorse rd
▼ Number: 4		
Sheppard, Jack	Contact	983 Adjustment Ave
▼ Number: 5		
Ford, James	Contact	587 Red rd
▼ Number: 6		
Kwon, Jin	Contact	6523 Hoenamu-ro
▼ Number: 7		
Kwon, Jin	Contact	433 SinHeung-ro

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.

CRM Contacts Sales Documents Purchase Orders Notes System Administrator's User Fields									
Refresh Months To Show: 6 Include: <input checked="" type="checkbox"/> Quotes <input checked="" type="checkbox"/> Orders <input checked="" type="checkbox"/> Invoices <input checked="" type="checkbox"/> Returns <input checked="" type="checkbox"/> Created By <input checked="" type="checkbox"/> Sales Rep Group By: ▼ X									
Source	Sales Doc Type	Sales Doc Num	Doc Date	Prev Sales Doc ...	Customer PO Num	Req Ship Date	Actual Ship Date	Total	Master Num
History	QUOTE	Q5213	4/12/2017					30.00	6,453
History	INVOICE	INV2299	4/12/2017			4/12/2017	4/12/2017	0.00	6,443
History	INVOICE	INV2298	4/12/2017			4/12/2017	4/12/2017	0.00	6,442
Void	QUOTE	Q5214	4/12/2017					30.00	6,454

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.

CRM Contacts Sales Documents Purchase Orders Notes System Administrator's User Fields						
Refresh Months To Show: 6 Include: <input checked="" type="checkbox"/> Standard <input checked="" type="checkbox"/> Drop Ship <input checked="" type="checkbox"/> Blanket <input checked="" type="checkbox"/> Blanket Drop Ship Group By: ▼ X						
PO Number	PO Type	PO Date	Promised Ship Date	Shipping Method	Subtotal	
PO2000	STANDARD	1/5/2016	1/5/2016		141.84	
PO2001	STANDARD	1/9/2016	1/5/2016	DROP SHIP	90.25	
PO2002	STANDARD	1/13/2016	1/5/2016	GROUND	93.55	
PO2003	STANDARD	1/17/2016	1/5/2016	DROP SHIP	103.79	

Notes

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

CRM Contacts Sales Documents Purchase Orders Notes System Administrator's User Fields

Notes

Add to Notes

☒ Append a Blank Line

[sa] 6/9/2015 1:31:05 PM Example note

Example Notes

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

Example Notes

Cut

Copy

Paste

Increase Indent

Decrease Indent

Font...

Paragraph...

Bullets and Numbering...

Bookmark...

Hyperlink...

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 [User Field Editor | SalesPad Desktop](#) for more information.

CRM Contacts	Sales Documents	Purchase Orders	Notes	System Administrator's User Fields	
Test					...

Attachments

- [load-all-system-users.sprept.txt \(301.00 B\)](#)