



Furniture Wizard Security

Introduction

In this section, we will introduce you to the new security features of Furniture Wizard. Furniture Wizard's security will allow you to set permissions for different areas of the program, thereby restricting access to sensitive areas and information. This can allow you to give your employees the ability to create invoices, or purchase orders, or any other functions, which might be related to their duties, while keeping them away from other more sensitive areas that they have no reason to have access to. You can also restrict users to only being able to create POs and invoices for their respective branches, removing the possibility of incorrectly creating these transactions. By assigning different users, you can give each one a different level of access, and assign them each a password. This also will allow you to easily change that user's permission levels (such as in the case of promotion, increased responsibilities, or transfers to other positions) without having to re-create user accounts.

Introducing User Accounts

Before you begin setting the permissions for whom can do what using Furniture Wizard, you must create users accounts. This will allow you to give your employees tailored access to the tasks that they need to perform.

Furniture Wizard allows you to have as many users as you need, provided that they each have a separate, unique password, of 1-4 characters. User accounts are automatically generated for your salespeople, with their name being used as the username. Users are then grouped in one of 5 different, hierarchical groups.

These categories, or security levels, are how permissions are assigned to users. The categories are Warehouse, Sales, Office, Managers, and Admin. Each category has a higher priority than the one before it, therefore, any permissions given to the lowest level, warehouse, will be available to all users, whereas a permission given to Office, will only be available to those in the Office category or above.

Creating your User Accounts

Before you begin setting the permissions for whom can do what using Furniture Wizard, you must create users accounts. This will allow you to give your employees tailored access to the tasks that they need to perform.

To access the Users page, double-click on the picture of the small wizard in the “Setup & Registration” window.



This will open up the “Password Administration” window, in the “Users” form. The default Admin account is already in there, as the first user account.

Double-click on the Wizard to open up the “Security Administrator” window (Below)

Security System Administration

Security System Administration

Users | Forms | Inventory | Customers | Invoices | Purchase Orders | Service

User Name	Password	User Level	Restrict User To Branch	Lock User to Branch Invoice	Lock User to Branch PO
Admin	úúý	Admin		No	No
Bryan		Sales		No	No
Marty		Managers		No	No
Jason		Warehouse		No	No
Teresa		Office		No	No

The Extended Security features will allow a user to be restricted to a specific branch. Select a branch for the user, and then choose whether the user should be locked to writing Invoices or POs for that branch only. Restricting the User to a Branch automatically prevents them from accessing reports for other branches.

Change all settings on this tab to:

Managers
 Office
 Sales
 Warehouse

Password Timeout Delay: 10
 Use Extended Security Mode

The first thing you should do is to change the password for the “Admin” user. To do so, click in the password column, next to the User Name, to set a new password. Remember, the password cannot be longer than 4 characters.

Type in a new password, between 1-4 characters long

Change Password

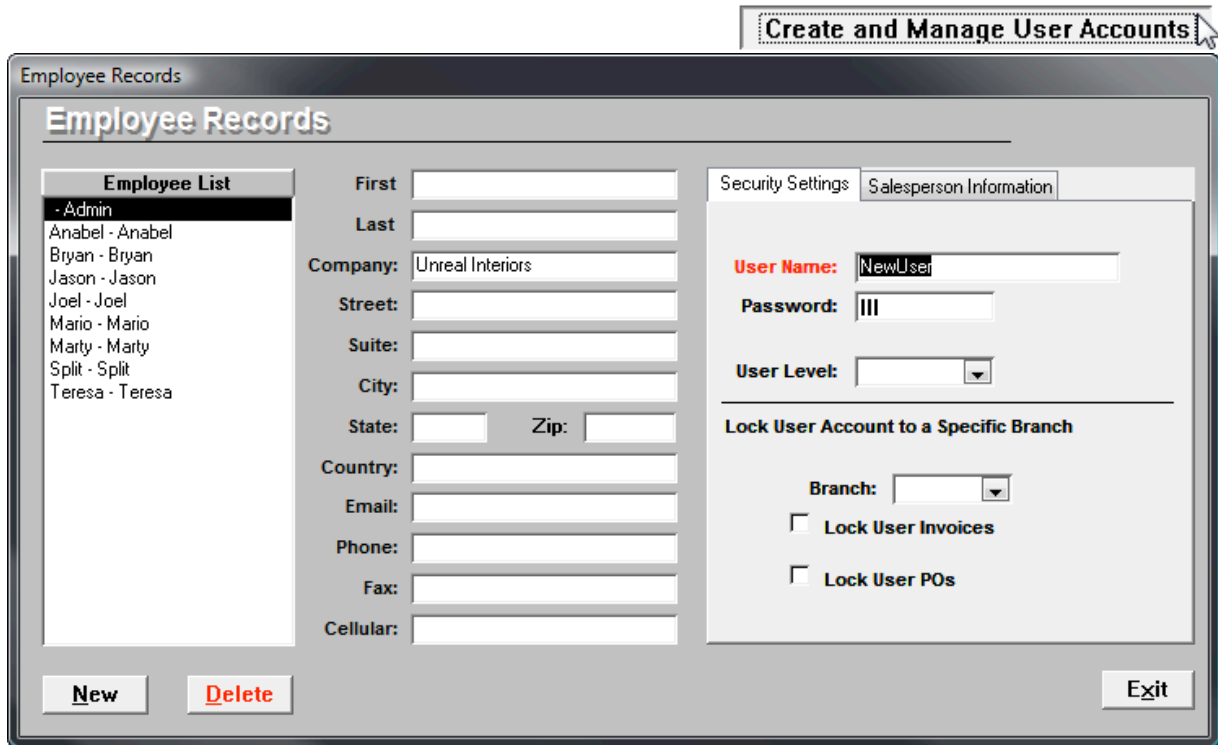
Password Editor

New Password:

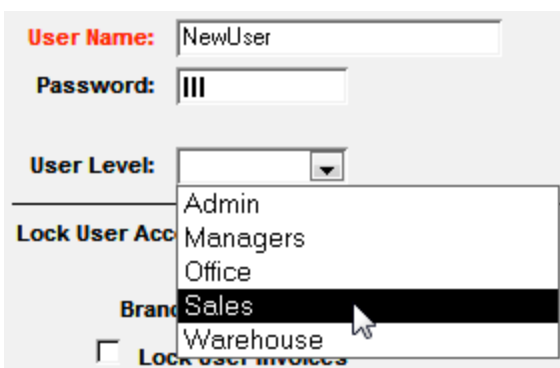
Confirm Password:

Now that you have set a password for your Admin account, you can begin creating your other user accounts or working with your salespeople's user accounts. Passwords, User Levels, and branch restrictions can be set for any user directly from the User's tab of the Security System Administration screen.

If you need to create accounts for users not currently listed in the Users tab, click the "Create and Manage User Accounts button" in the bottom left hand corner of the Security Administration Screen. This will bring up the Employee Records screen. Accounts can then be added for any employee not yet in Furniture Wizard.



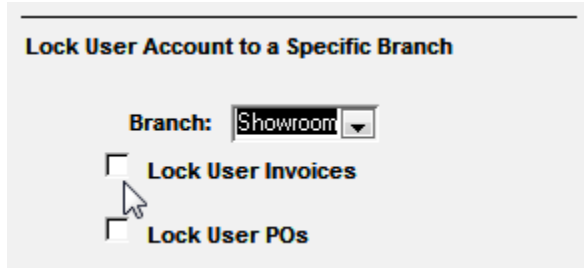
New users can be added by clicking on the "New" button on the bottom left hand corner, and entering their information. The Company field will be automatically filled in with your company name. If this new user will also be a Salesperson, the Salesperson Name and commission rates can be specified by clicking on the Salesperson Information tab. A temporary User Name is automatically generated, as "NewUser" and a password of "123". This should be changed to the desired name and password for the new account.



The next step in creating a user is to assign it a user level. From the User Level field, select a level from the available options: Admin, Managers, Sales, Office, or Warehouse.

Specify a new User Level for this person

With the user account now created, you have the opportunity to decide if that person should be restricted to a certain branch. This function is especially useful in multi-store situations, where an employee should not be able to see or create invoices or POs for a branch other than the one they work in. If Furniture Wizard is being used in a Terminal Services environment, it will also allow the user to automatically login to the proper branch, instead of being prompted every time.

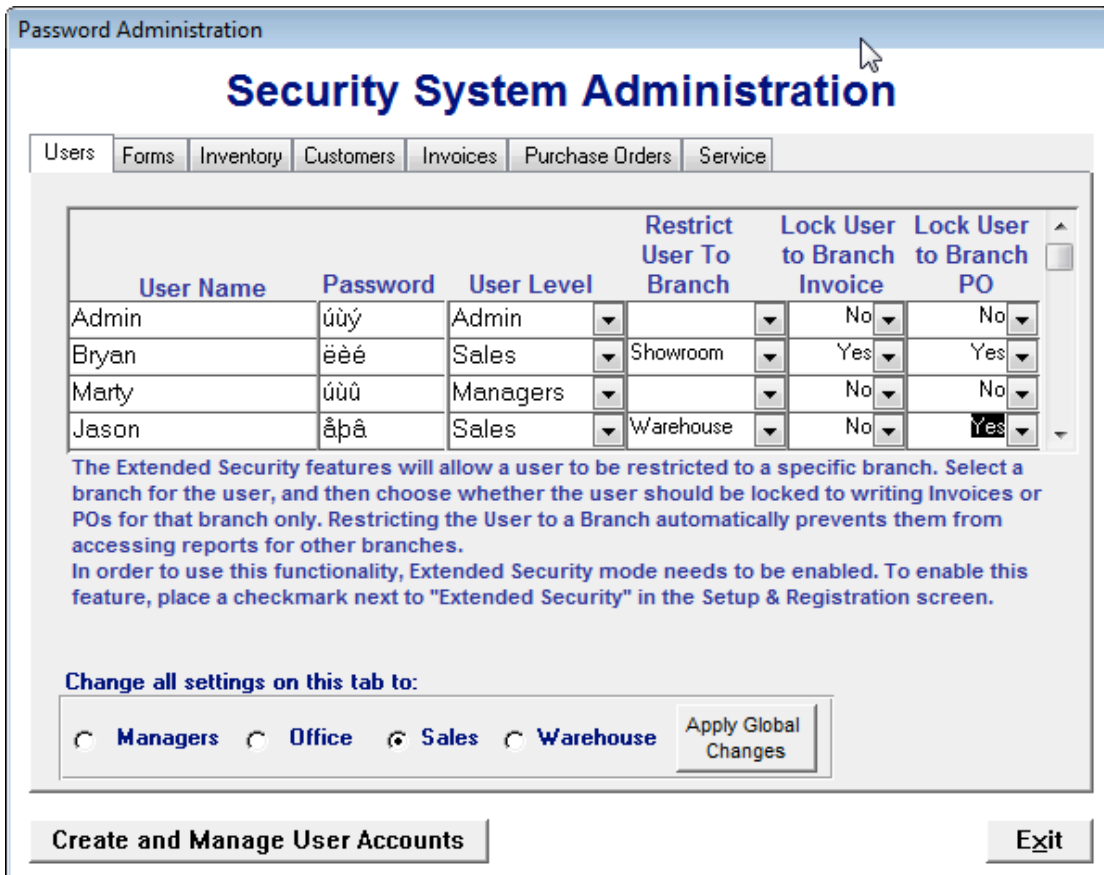


Select the branch the user should be locked to, and choose whether to lock users to seeing and working with Invoices and POs for their branch only

To restrict a user to a specific location, select the branch in the “Lock User Account to a Specific Branch” section. You can additionally lock the user to seeing Invoices or POs only for their branch, by placing a checkmark next to the appropriate option.

Repeat these steps to create all of your users. Once you have all of your users created, you can proceed to assign them privileges. Once you are done, click “Exit” to return to the “Security System Administration” screen.

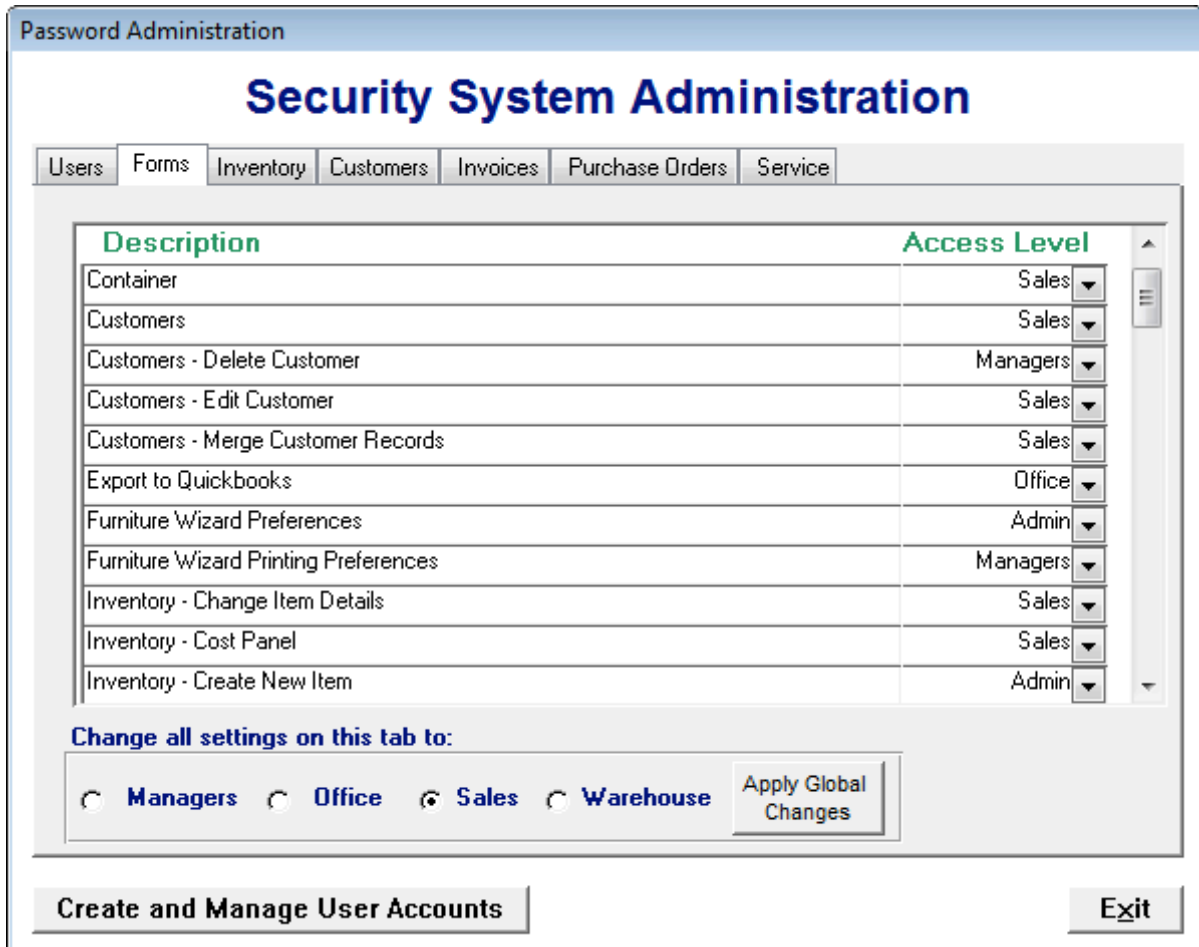
All of these settings can also be modified in a list view directly from the Security System Administration screen.



User passwords, levels and permissions can also be modified from the Security System Administration screen

Assigning Permissions

Now that you have your users created, you can assign permissions to which groups have privileges to different sections of the program. Click on the “Forms” tab at the top of the “Security System Administration” window.



The Security Administrator window, with the “Forms” screen

In this window you can set permissions as to which User Levels can perform which functions. You can restrict access to several screens within Furniture Wizard by assigning those forms a minimum Access Level needed to open the screen. The other tabs, (Inventory, Customers, Invoices, Purchase Orders, and Service) list the reports that can run using Furniture Wizard. Access to any or all of these reports can also be restricted to certain groups.

To change the access to a certain form or report, click on the drop-down menu under the “Access Level” column for the item you wish to change. Now only a user with an access level equal to or greater than what you have entered will be able to access the form or report.

It is also possible to set all forms or all reports to require a minimum access level without going through each one and specifying the access level. To set a new Access Level for all settings in the current tab, select the new setting at the bottom of the screen, in the “Change All settings on this tab to” section, and click the “Apply Global Changes” button. You can now change each exception to this setting individually.

Turning on the Security Features

Now that you have configured your users and assigned the proper settings, the security system needs to be enabled. In the bottom-right hand corner of the “Setup & Registration” screen, change the Security setting to “Enabled”.

Selecting “Enabled” will turn on Furniture Wizard security

The “PSW Delay” will can specify an amount of time (in minutes) that you will be asked for a password

The last option that needs to be configured is the password delay, or “PSW Delay”. This setting lets you walk away from the computer, and after the amount of time (minutes) that you specify, will require you to re-enter your password. By default, this is set to 10 minutes; however, this can be set to the time interval you prefer. This interval applies to all users.

If at any time you wish to lock Furniture Wizard so that a password will be required, without needing to wait for your password to time out, you may type in **Ctrl-Shift-F2** on your keyboard, and Furniture Wizard will now be locked.

Security System Options - Forms Tab	Description
Container	Locks a user out of the Container screen.
Customers	Prevents a user from accessing the Customer's screen
Customers - Delete Customer	Prevents a user from deleting a customer record.
Customers - Edit Customer	Prevents a user from modifying customer information.
Customers - Merge Customer Records	Prevents a user from merging 2 customer records into one
Export to QuickBooks	Prevents a user from Exporting to QuickBooks.
Furniture Wizard Preferences	Prevents a user from editing Furniture Wizard Preferences, such as Printer settings
Furniture Wizard Printing Preferences	Prevents a user from changing printing preferences
Inventory - Change Item Details	
Inventory - Cost Panel	Prevents a user from seeing the cost of inventory items
Inventory - Create New Item	Prevents a user from creating new Inventory Items
Inventory - Lock Inventory Grid from Changes	Locks a user from making any changes to the inventory Quantities, or altering any other information in the inventory grid
Inventory Screen	Prevents a user from looking at the Inventory screen
Inventory Reconciliation - Update Inventory Qty	Prevents a user from Updating Inventory Quantities after performing an inventory reconciliation
Inventory Reconciliation - Zero un-scanned Items	Prevents a user from zeroing out items that had not been scanned in a previous inventory reconciliation session
Inventory Transfers	Prevents a user from performing or viewing Inventory Transfers
Invoice - Change Customer	Prevents a user from changing the Sold to or Shipped to customer on an invoice
Invoice - Change Delivery Date on Delivered Item	Prevents a user from changing the delivery date on a delivered item
Invoice - Change Invoice Date	Prevents a user from changing the invoice date
Invoice - Change Invoice Number	Prevents a user from changing the invoice number
Invoice - Change Invoice Status & Type	Prevents a user from changing the status (Pending, Delivered, Void, Layaway) or Type (Invoice or Quote) of an existing invoice
Invoice - Change Salesperson	Prevents a user from changing the salesperson for an existing invoice
Invoice - Change Selling Location (Branch)	Prevents a user from changing the branch or selling location of an existing invoice
Invoice - Create New Invoice	Prevents a user from creating any new invoices
Invoice - Deliver Negative Items (Returns)	Prevents a user from delivering items with negative quantities
Invoice - Discounts, Price Adjustments & Sales Tax	Prevents a user from applying discounts or performing price adjustments for an invoice
Invoice - Edit Delivery Fees	Prevents a user from setting or changing delivery fees
Invoice - Edit Invoice Details	
Invoice - Edit Item Cost Information	Prevents a user from altering the cost information for an item sold
Invoice - Edit Item Price	Prevents a user from changing the selling price of an item
Invoice - Edit Item Quantity	Prevents a user from changing the quantity of an item on an

	existing invoice
Invoice - General Fields	
Invoice - Manually Process Inventory	Prevents a user from manually processing inventory. Does not prevent user from the non-manual options such as "From Whse" or "On Hold"
Invoice - Modify a Processed Invoice	
Invoice - Open Existing Invoice	Prevents a user from looking at an existing invoice
Invoice - Process Inventory	Prevents a user from processing inventory
Invoice - Set or Change Delivery Date	
Invoice - Void Invoice or Change Complete Date	
Packages	Prevents a user from seeing the Packages screen
Packages - Edit	Prevents a user from modifying or creating a Package
Payments - Change Payment Amount	Prevents a user from changing the amount of an existing Payment
Payments - Change Payment Date	Prevents a user from changing the date of an existing payment
Payments - Change Payment Method	Prevents a user from changing the payment method of an existing payment
Payments - Delete Existing Payment	Prevents a user from deleting an existing payment
Payments - Open Cash Drawer	Prevents a user from opening the cash drawer
Payments - Receive Payment	Prevents a user from receiving a new payment
Purchase Order - Convert Special Order to Stock	
Purchase Order - Hide Cost from Printed Order	
Purchase Order - Receive Negative Qty (un-receive)	
Purchase Order - Void, Cancel or Re-Issue PO	Prevents a user from Voiding an invoice, or cancelling/re-issuing a PO
Purchase Order Screen	Prevents a user from accessing the Purchase Orders window
Quick Tags - Change Pricing Information	Prevents a user from changing the price of items on a Quick Tag
Representatives Screen	Prevents a user from accessing the Manufacturer's Representatives screen
Security System & Employee Records Administration	Prevents a user from accessing and modifying security system settings and salesperson information
Service	Prevents a user from using the Service feature
Super Search - Customers	Prevents a user from using the Customer Super Search functionality
Super Search - Inventory	Prevents a user from using the Inventory Super Search functionality
Super Search - Invoices	Prevents a user from using the Invoice Super Search functionality
Suppliers Screen	Prevents a user from accessing the Suppliers screen
Suppliers - Update Vendor's Costs	Prevents a user from updating cost information for a supplier