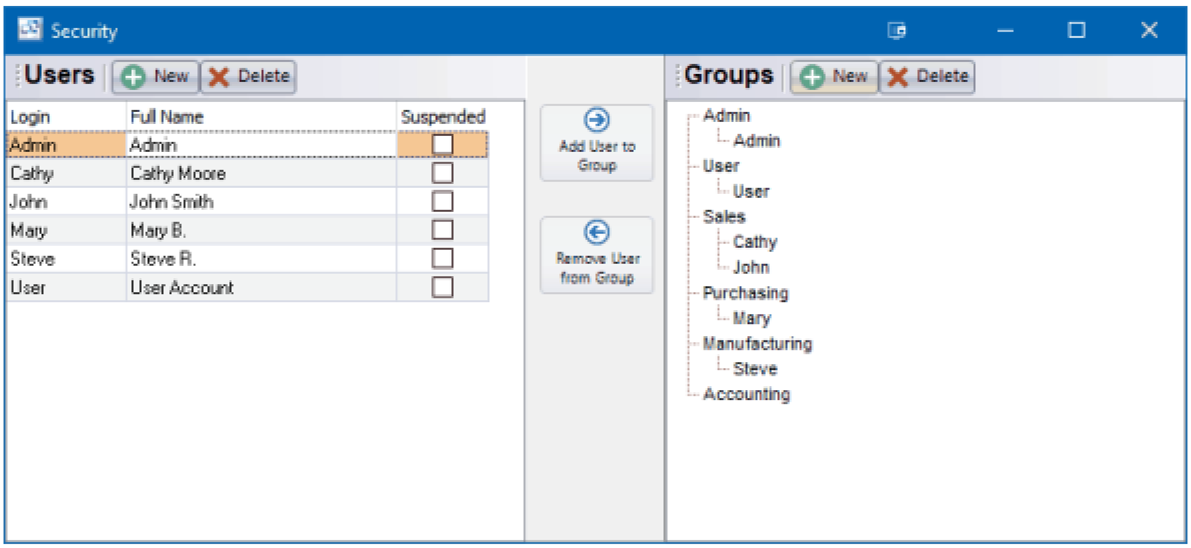
Pilot ERP Software

User Security

System Setup | User Security

The Security screen displays a list of users allowed access to the company database(s) and security groups. Each user must be assigned to one security group to allow login to Pilot ERP.



You can assign a unique username and password to each user.

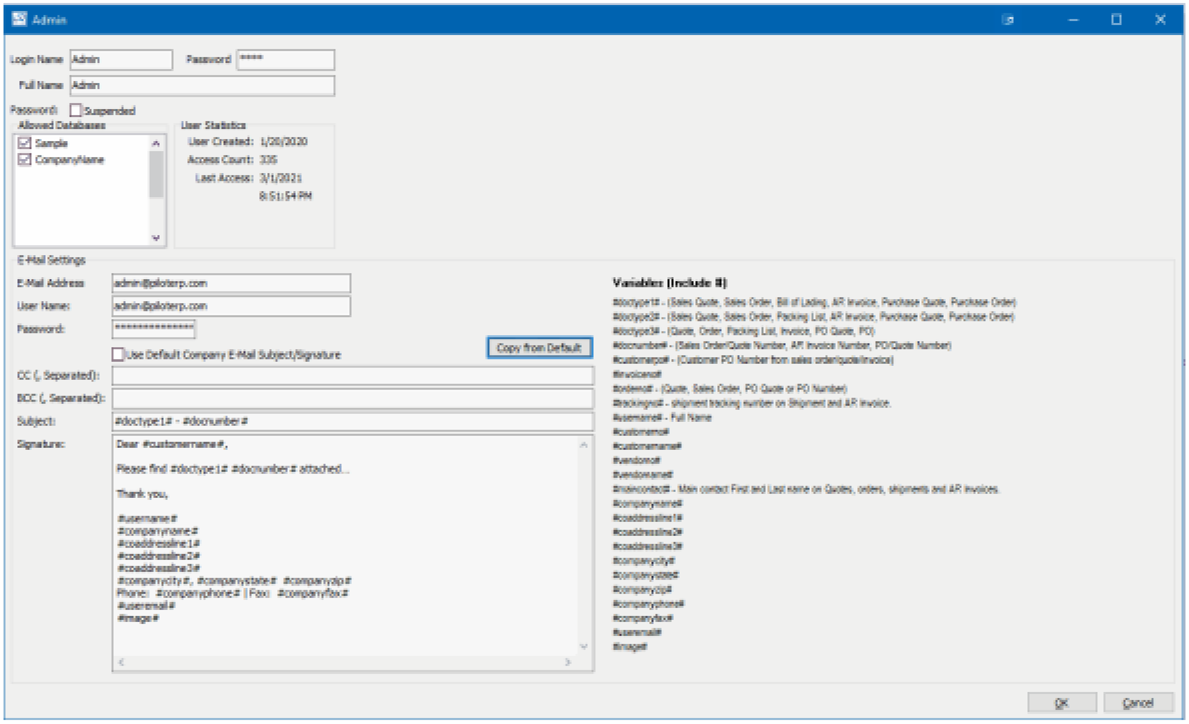
You can also create user security groups and specify which parts of the program users assigned to that group are allowed access to, such as Customers, AR Invoices, Invenetory, etc.

To activate security, add at least one user. Users will then be required to enter a valid user name and password in order to access the database. To deactivate security, delete any previously added users.

To add a new user: click the New button.
To edit a user: double-click the user. Or select the user and press Enter or click the Edit button.
To delete a user: select the user and click the Delete button.

You can select a user with the mouse or by the keyboard via the Page Up/Down and arrow keys.

User Setup



User Name - Enter the name of the user.
Example: John Doe

Suspended - If checked, the user will not be able to log on.

Password - Enter the password (optional) for this user. Each user can have a different password.
Tip: It is recommended that you change the passwords regularly.

Allowed Databases - Check the company databases that this user is allowed access to.

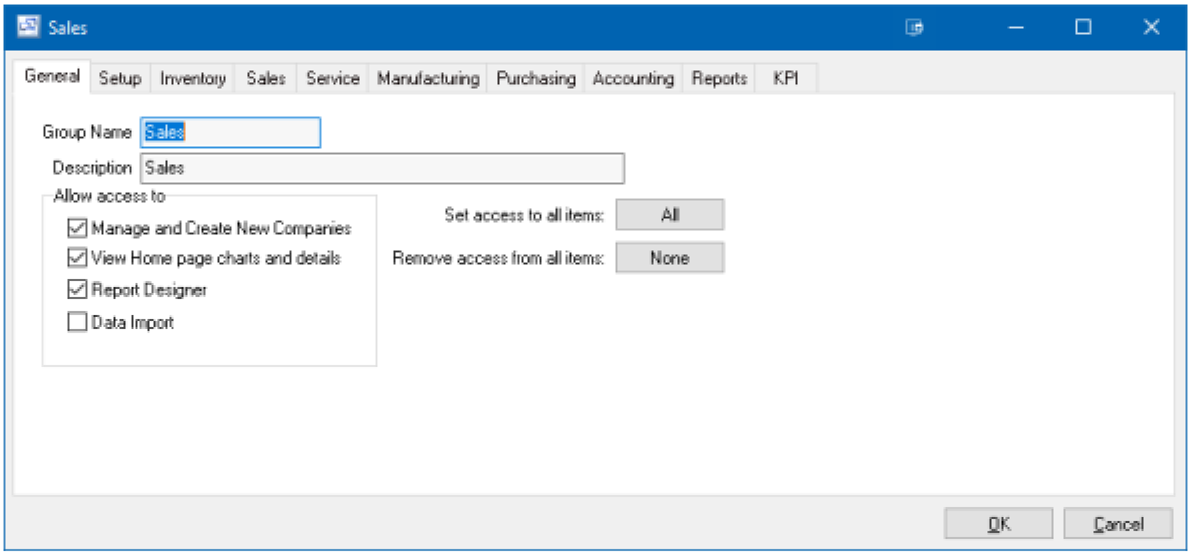
Email Settings - If you are using the SMTP email option, you can enter the users email address, email username and
password here. You can also choose to use the default company email signature set up under the
Setup = Your Company - Email tab or enter the users signature.
For more details on email setup, see the following article: SMTP Email Setup

Variables - The list of available variables allows you to add information such as Sales Order Number, Invoice
Number, PO Number, Customer Name, Supplier Name, etc. to the Subject or Body of the email
generated through Pilot. When you open an email, Pilot will populate those variables with the
appropriate linked information from the order you are attempting to email.

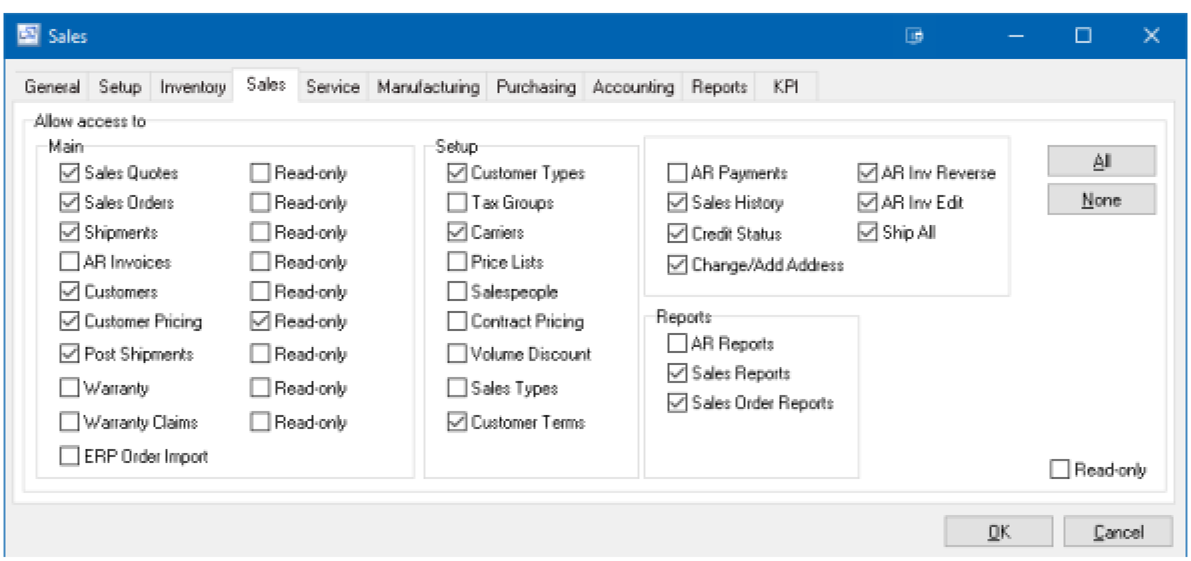
There is a Default template your can use in the System Setup - Your Company - Email tab for all users
or as a starting point for your customized email.

User Groups

Create user groups to designate which screens and functions users have access. You can set up as many groups as needed. Each user must be assigned to a group in order to access Pilot ERP.



Examples of user Groups are:
Administrator
Management
Sales
Manufacturing
Inventory
Purchasing
Shipping
Receiving
Accounting
Each module is listed with a separate tab and contains all major screens within that module.



On the General tab, you have the option to all or prevent access to the user for:
Manage and Create New Companies
View Home page chart and details
Report Designer

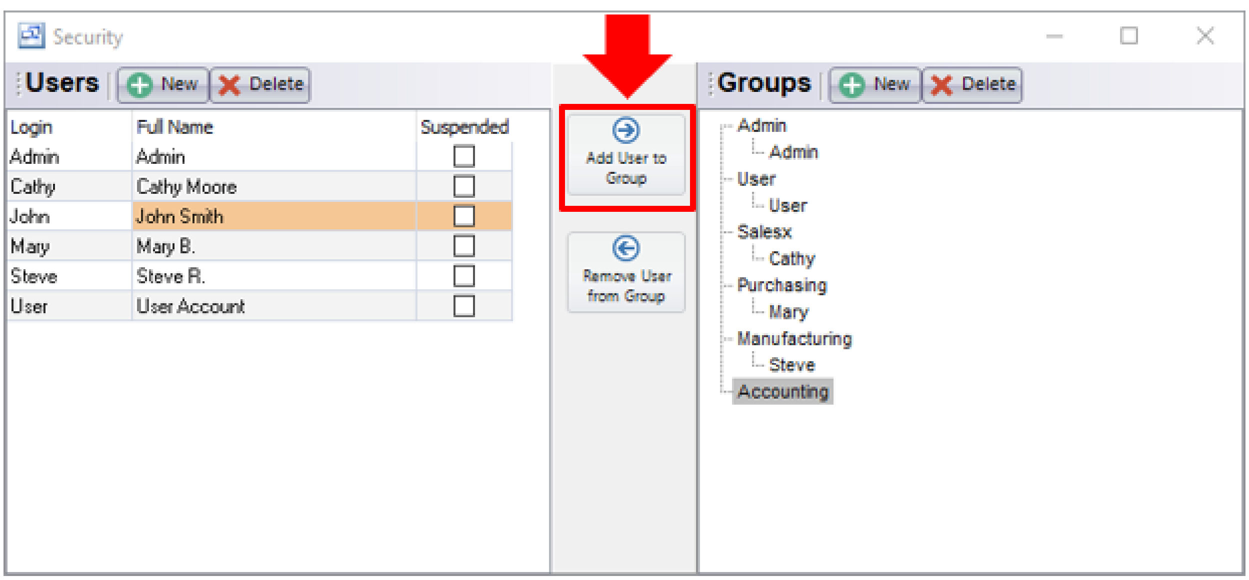
On the main module tabs (Inventory, Sales, etc.) there is a "Read Only" option which can be used to give read only access to users. If the screen option is checked and the Read Only option is also checked, the user can open the screen and view the information but will be unable to edit, create or delete any information in that screen.

Adding and Removing Users from Security Groups

Once your user and security group have been created, you will need to assign each user to a single group.

To add a new user to a security group:

1) First select the user (left click) from the main user security screen.
2) Then select the security group (left click) from the list of groups on the main security screen.
3) Next click the “Add User to Group” button. You will see the username added below the security group you have selected.



To remove a user from a security group:

1) Select the username (left click) listed under the security group on the right.
2) Click the "Remove User from Group" button. You will see the username removed from the security group list. This will NOT delete the user account, only remove it from the security group.

   NOTE: If the user is not assigned to a security group, that user will not be able to log into Pilot.