

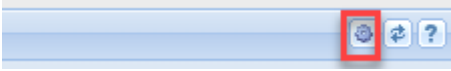
Security

- [View Security Button](#)

View Security Button

This only applies to users who have access to view the security button

The security button is found under each menu, on the top right



First one needs to give administrator access to this button from the module access screen

Go to System Configuration Module> General User Setup

If the user already exists, search for the user you would love to give access to then double-click or click edit

The screen below will be displayed

Click on the Access Module Tab

Then put a tick on View Security

Edit Employee Info

User Management

Attachments Restrict Access Set Password Incident Functions Close

Details 1 Details 2 **Module Access** Address Account Details Email Custom Fi

System Configuration Module:	Full Access System Config	Reports And Security Role:	Administrator
General Ledger Module:	Full Access General Ledger	Shortcut Role:	Basic Shortcut Role
Debtors Module:	Full Access Debtors Modul	Form Security:	Full Security Role
Creditors Module:	Full Access Creditors Modu	CRM:	Webatar Full Security Acce
Inventory Management Module:	Full Access Inventory Modi	Asset:	Asset Tracker Role Access
Job costing Module:	Full Access Job Costing	Lab Module:	Lab - Full Access
Energy Module:	Full Access - Energy Modul	Production Module:	Production Tracking Full A

Allow Multiple Module Windows:	☒	Job Supervisor:	☒	Mobile Access:	☒
Show Column Selector:	☐	Financial Supervisor:	☒	Mobile Role:	Mobile Full Access Security
View Security Button:	☒	Change Control Supervisor:	☒	Add Edit Delete	
Allow Statement Export:	☒	Password Supervisor:	☒	Exclude CRM:	☐
Storeman:	☒	Purchase Supervisor:	☒	Preferred Users:	Preferred Users
Change Control Manager:	☒	Messages Supervisor:	☒	Warehouse Access:	Warehouses
Supplier Bank Acct. Change:	☒	Sales Margin Supervisor:	☐	Default Warehouse:	MAST - Master Warehouse
Sales Order Status:				Default Storeman:	
Default Favourites Report:	☒	Hide Slider Menu:	☐	Process by Internal User:	☐
Module Dashboard:	☐	Internal User Popup:	☐		

Save Close

Once the security has been set the user will need to logout then login so the change can apply

When logging back in the user will see the security icon at the top right corner of almost each screen

Here is an example of how it works on the invoice screen

Go to **Debtors Module> Activity> Invoices**

Then click on the security icon in the top right corner and the screen below will appear

You can edit a new role or add a new one

You can also see other security roles on the drop down menu selection and from menu

You can select anyone you want to create or edit a role for

Manage Form Security

Form Settings

Search Add Role Edit Role Delete Role Sync Security Close

Form Name: **frmDMInvoiceSearch**

Security Role: Full Security Role

Form: frmDMInvoiceSearch

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#	Permission
1	Disable Button Add
2	Disable Button Bulk Print
3	Disable Button Cancel
4	Disable Button Clone Invoice
5	Disable Button Create Reminder
6	Disable Button Edit
7	Disable Button Export Grid
8	Disable Button Import Bulk Serial Numbers
9	Disable Button Import Invoice From CSV File
10	Disable Button Print Grid
11	Disable Button Print Invoice
12	Disable Button Process Invoice
13	Disable Button Proforma Inv. Process
14	Disable Button Quick Process

Add Permission Edit Permission Delete Permission Save Permission

Once complete and the permission is saved

If editing an existing role the permission will apply

If its a new role then you need to apply the role on the user setup screen

Edit Employee Info



User Management



Attachments Restrict Access Set Password Incident Functions Close

Details 1 Details 2 Module Access Address Account Details Email Custom Fi

System Configuration Module:	Full Access System Config	Reports And Security Role:	Administrator
General Ledger Module:	Full Access General Ledger	Shortcut Role:	Basic Shortcut Role
Debtors Module:	Full Access Debtors Modul	Form Security:	Debtor Clerk
Creditors Module:	Full Access Creditors Modu	CRM:	Admin Clerk
Inventory Management Module:	Full Access Inventory Modi	Asset:	Debtor Clerk
Job costing Module:	Full Access Job Costing	Lab Mo	Full Security Role
Energy Module:	Full Access - Energy Modul	Product	Invoicing
			No Access
			PO Clerk
			TEST ROLE
			kk
Allow Multiple Module Windows:	☒	Job Supervisor:	
Show Column Selector:	☐	Financial Supervisor:	
View Security Button:	☒	Change Control Supervisor:	
Allow Statement Export:	☒	Password Supervisor:	☒
Storeman:	☒	Purchase Supervisor:	☒
Change Control Manager:	☒	Messages Supervisor:	☒
Supplier Bank Acct. Change:	☒	Sales Margin Supervisor:	☐
Sales Order Status:			
Default Favourites Report:	☒	Hide Slider Menu:	☐
Module Dashboard:	☐	Internal User Popup:	☐
		Exclude CRM:	☐
		Preferred Users:	Preferred Users
		Warehouse Access:	Warehouses
		Default Warehouse:	MAST - Master Warehouse
		Default Storeman:	
		Process by Internal User:	☐



Save



Close