Setting up New Users

There are up to 7 different steps that need to be completed to correctly add a new user to Ximple (first 4 of them a MUST):

1. **Create User:** you'll need addresses for each user
2. **Give User Branch Authority:** so that they can view and work with company data (you will be unable to enter GR or SO and PO w/o branch authority, as you will not see the WH/Branch at time of transaction)
3. **Give User Inventory Authority:** Key for personnel doing GR and AP
4. **Give User menu options:** Otherwise they'll log in and not be able to view anything
5. **Enroll user into Purchasing Group (Purch Agents only):** w/o enrollment will be unable to enter Manual PO or work with RPO (sales person need not be enrolled, as they gain EBO authority via their sales person setup)
6. **Enroll user into Credit Group:** AR personnel only (need in order to work with credit holds on customer accounts)
7. **Enroll user into Sales Group:** Anyone who needs to have access to sales orders (authority for each individual sales person can vary)

How to Get to the Option

- Adding a new user and giving them Branch & Inventory Authority:
  - Open Employee List: Administration module -> List Employee option
    - Add New User: **Add New** button
    - Assign Branch Authority: **Branch Authority** option from popup menu
    - Assign Inventory Authority: **Inventory Authority** option from popup menu

- Give user menu options:
  - Administration module -> User Authorization -> **Setup** submenu option

- Enroll in Purchasing Group:
  - Administration module -> Purchasing Group option -> **Enroll** popup option

- Enroll in Credit Group:
  - Administration module -> Purchasing Group option -> **Enroll** popup option

- Enroll in Sales Group:
  - Sales module -> Setup -> **Sales Group** submenu option