The default login and password when your program is first set up is blank. You just click OK and enter the program. For small offices, this is often ok. However, sometimes you may feel the need for more security. This is where our USERS and GROUPS come into play. This allows you to setup user logins with passwords and assign restrictions. You will want to set up your GROUPS before you set up USERS.
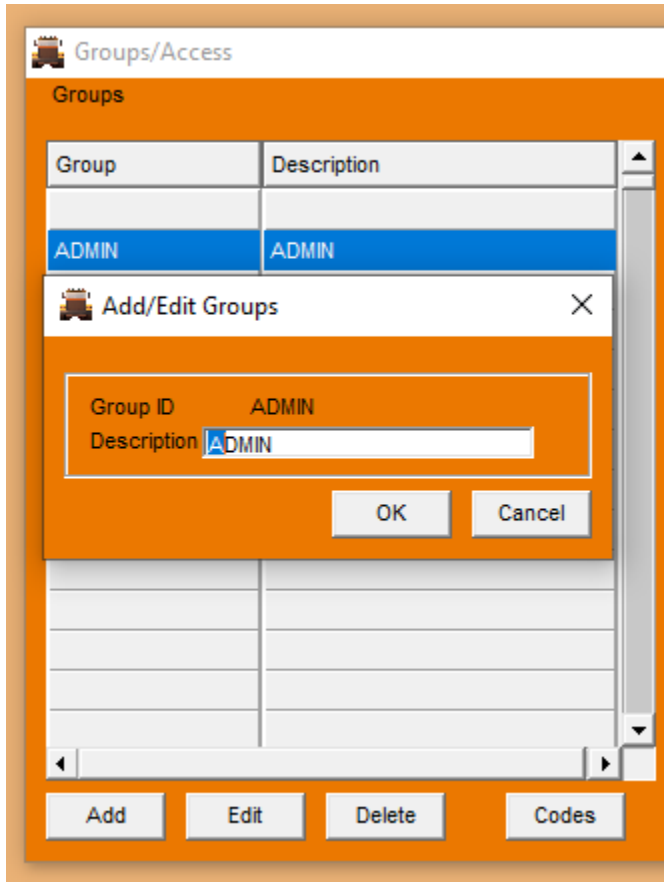
GROUPS
You can add as many groups as you want, but remember you will only assign one group to a user.

In order to use the Admin Tools menu you must have admin privileges. Contact your Support Team if needed.

Select Admin Tools and then click on Group/Access.
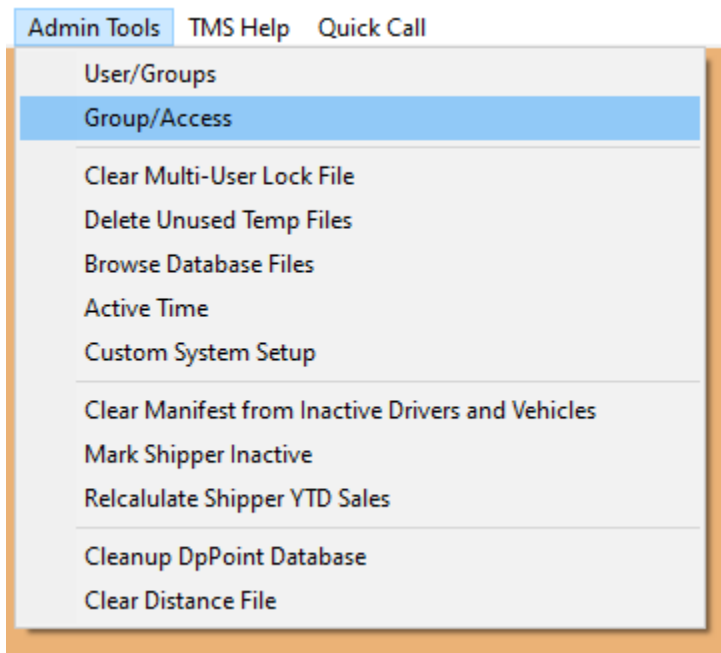
You may want to start by adding Admin as a group, even though you were able to use it to see the menu option. All that you need is the group ID and a description. Click OK to save.

Since Admin has no restrictions, there is nothing else to do.

You can now start adding groups that will have restrictions.

Here is a good example of a group you might use and the restrictions. You might have agents that use dispatch for loads but you need to limit what they are able to "see" or access. In this example we are disabling some menus and some edit abilities as shown in the middle column. The far right column shows the actual users that are in this group.
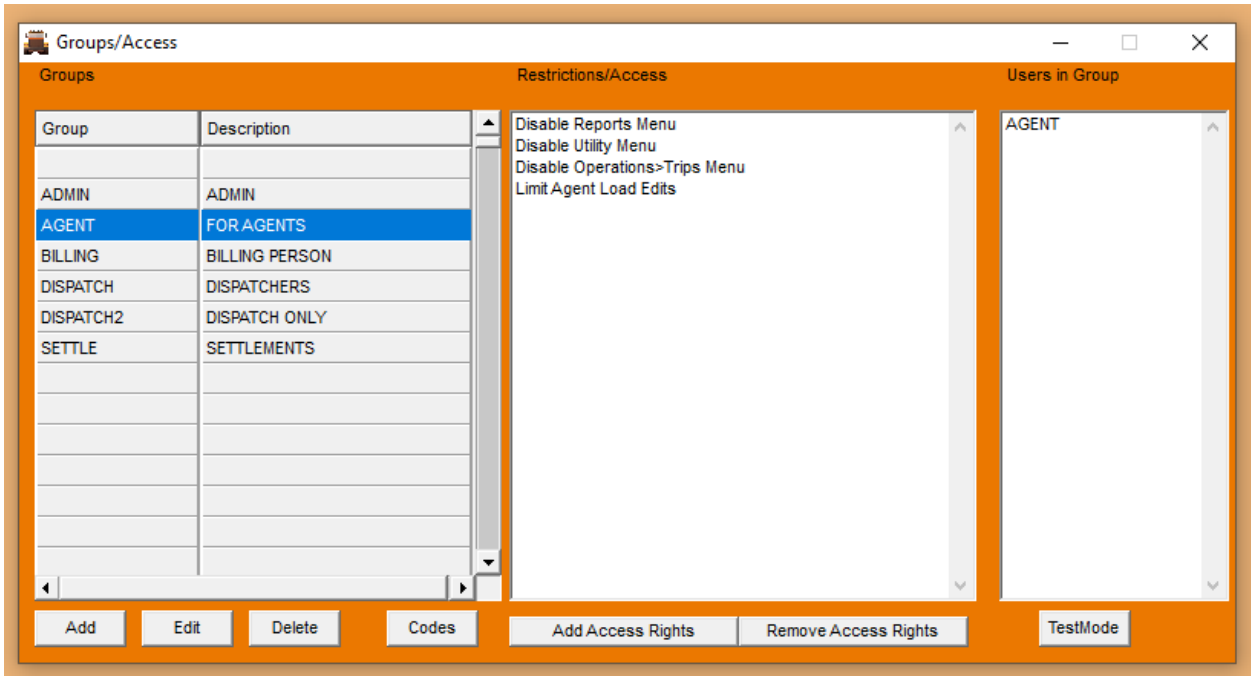
After creating your group you will add your restrictions/access.

While still highlighted on the group, click Add Access rights. This pop up will appear.
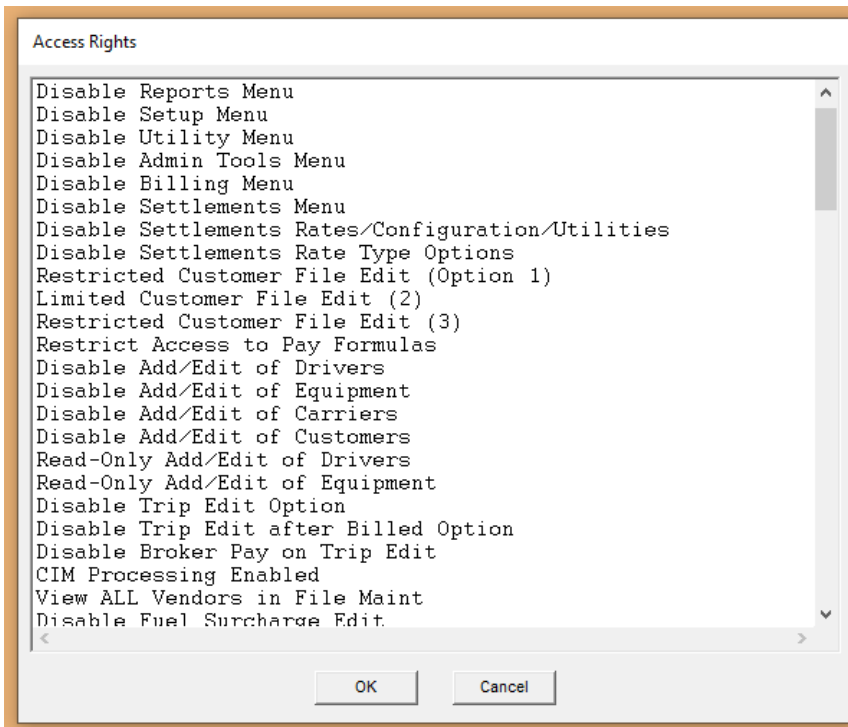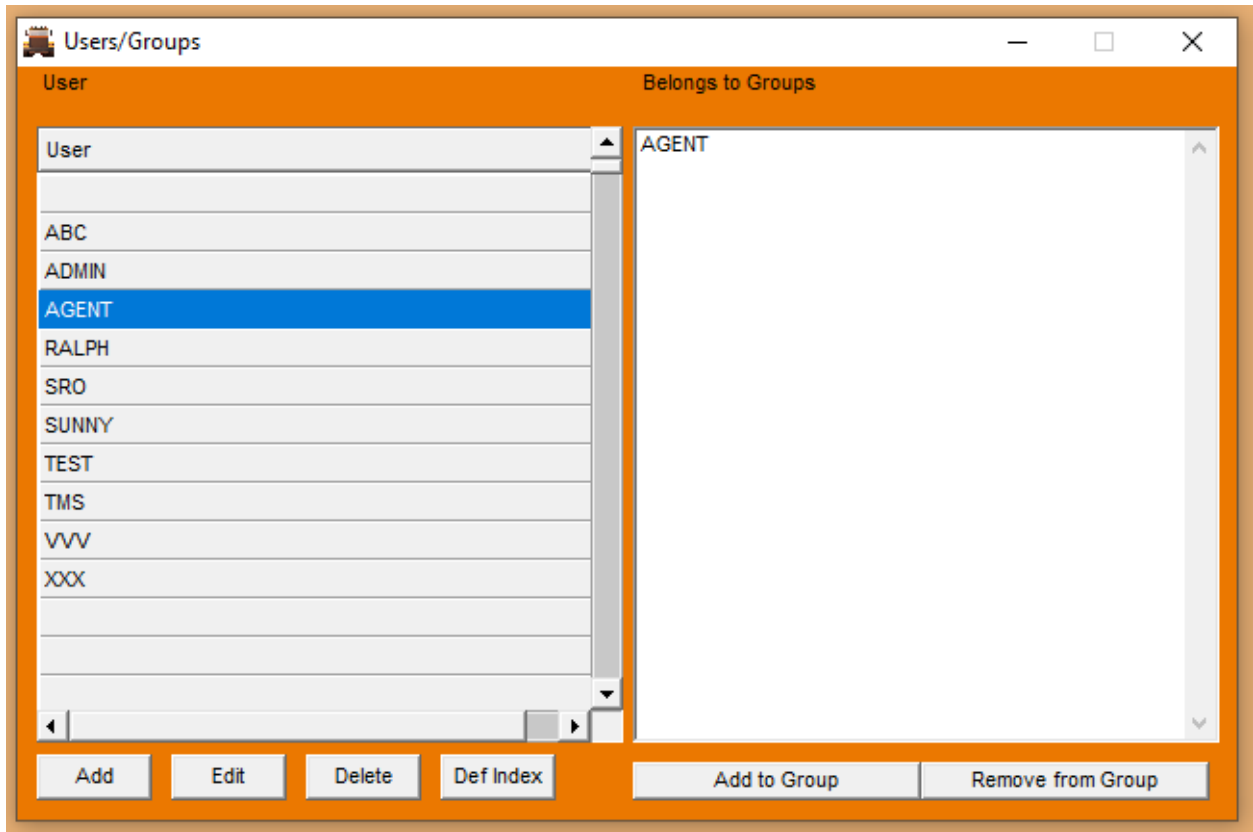
Choose what you would like to disable or limit and click OK.
Repeat for more limitations for this group. Add more groups and repeat the limitations process.

USERS
Now that you have added your groups, you need to setup users and assign them to the group that allows them the appropriate access to do their job.

Go to Admin Tools and select Users/Groups

Click the Add button

The user ID is the user's name that they want to use when they log in. Password can be anything they choose. Dispatcher initials are typically their own name initials. The remaining fields are optional.
Click OK to save.

Now you can add that user to the group that allows him or her access or restrictions appropriate to his job. Highlight the user and click Add to group in the lower right hand section. A pop up of the groups you have created will appear.

Select the group this user belongs in and click OK. Remember, you only assign the user to one group.