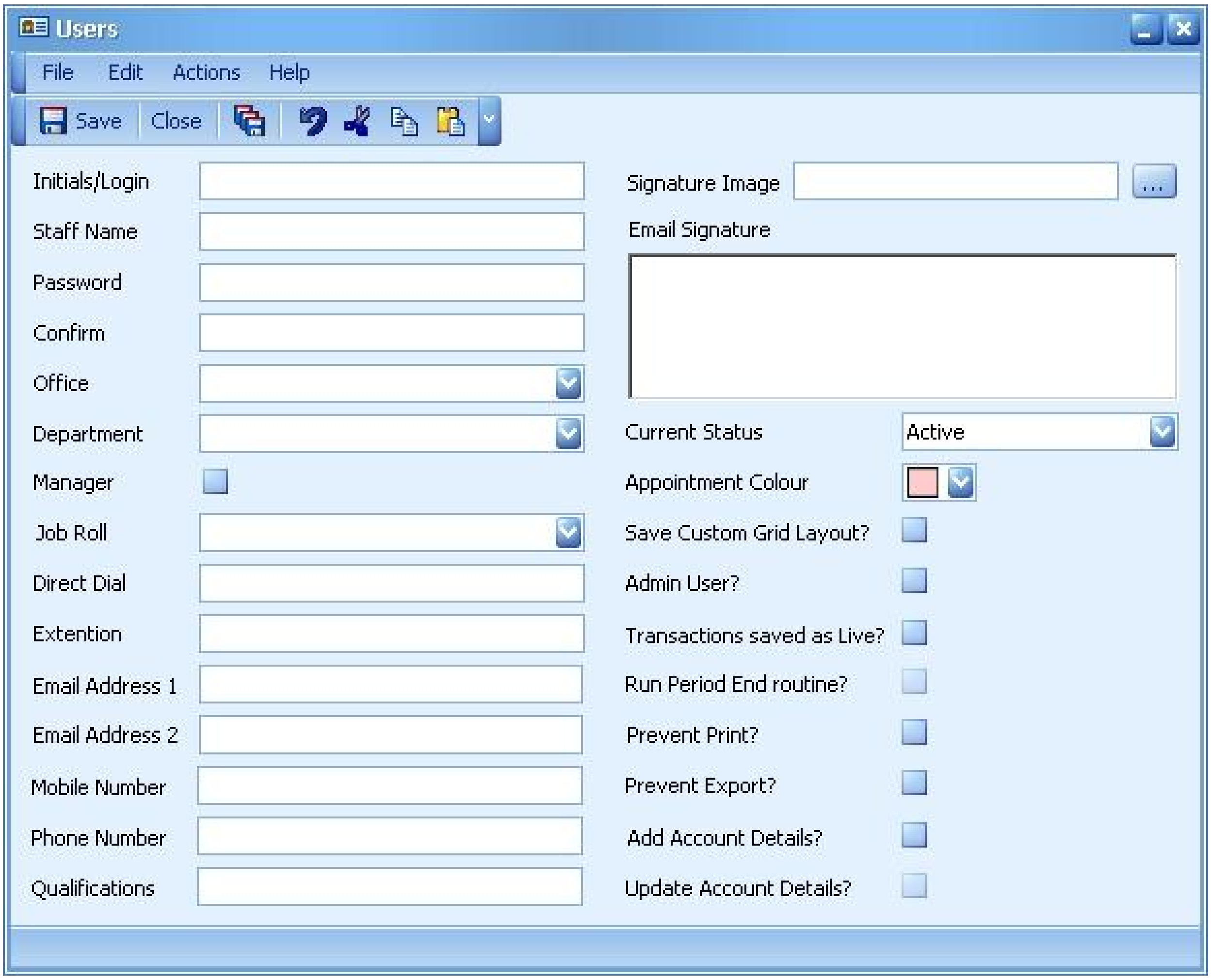
Veco Admin Guides –

User Details

Introduction

Regardless of how many licenses you have for the “Veco” software, any number of individual user logins can be created.

Each user login allows ore restricts access to the “Veco” functionality.



User Details

User login details can only be entered or amended by an “Administrator”. This is the person within your organisation who is allowed to configure the “Veco” software.

To add a new User:

1. Click the “Users” grid option from either the “Admin” node on the menu tree, or by clicking “Admin : Users” on the top menu. This will give you a list of existing users.

2. On the top secondary menu click “Add New”. This will bring up a blank “User Details” form.

3. Complete the details as fully as possible. Most fields are self-explanatory however, please note the following important fields:

    a. Initials/Login

    This is the user login code that will be used to gain access to the software. Generally, this would be the initials of the user.

    b. Password

    This is a password for the user. This can be changed at any time by the user.

    c. Office

    This is the name of the office where the user normally works. This is important because, by default, some information “grids” only show items that relate to the user’s office.

    d. Department

    Each user is assigned to a specific “Department”. This will determine what information is shown on any customised contact and property forms. The main departments are:

    - General – The user is not specific assigned to a department
    - Lettings – The user works in a lettings branch. They might be a negotiator or administrator.
    - Management – The user works in the property management department
    - Sales – The user works in the sales department. They might be a sales negotiator.
    - Accounts – The user works in the accounts department and would normally be allowed access to accounts functionality.
    - Auctions – The user works in the auctions department
    - Weekend Staff – The user is a part-time weekend negotiator or administrator

    e. Manager?

    Tick this box if the user is an office manager or needs certain security rights. – for example, to activate a tenancy, or to enter/update account sort codes and account numbers.

    f. Job Roll

    This can be any specific roll as defined under “Admin : Types”.

    g. Signature Image

    This is a link to a scanned image of the user’s signature. This can then be inserted automatically on mail merge letters which may be e-mailed rather than printed.

    h. Email Signature

    Use this to automatically insert some text at the bottom of e-mails sent via “Veco”.

    i. Current Status

Select either “Active” or “Archived”. Archived users are not allowed to log in to “Veco”.

j. Appointment Colour

On the main calendar, each user can be assigned a specific colour to make it easier to pick out certain users or user job roll. For example, all branch negotiators could be display in one colour while office managers could be displayed in another.

k. Save Grid Layout?

When looking at grid information the columns can be removed and moved to create a bespoke layout to suit your company or certain users. The resulting layout can be saved for the future by right-clicking anywhere on the grid. Tick this box if the user should be allowed to save customised grid layouts.

l. Admin User?

Tick this box if the user should be give access to the “Admin” option in the top menu. This menu gives the user the right to make changes to the various parameters and other default settings.

m. Transactions Saved as Live?

Tick this box if the user is allowed to save transactions directly with the status of “Live” as opposed to “Draft” status whereby any transactions require verification before becoming live. Where or not the user has access to any of the accounts functions is determined by the customisation of the menu tree layout.

n. Run Period End Routine?

If the user is allowed to save live transactions they may also be give the rights to run the “Period End” accounting routines.

o. Prevent Print / Prevent Export?

These options are used for security and can stop lists of contact names and address, and property details from being printed or exported into excel.

p. Add Account Details / Update Account Details?

These options are used for security and can stop the user from either adding or changing certain bank account details (ie Sort Code and Account Number) that relate to contacts.

4. Click “Save”

5. After saving the details use the “Form Access” to customise the user’s security rights to add, update, and delete certain details. For further details see the document “Veco Admin Guides – Security Access”.