

## HOW TO CREATE A NEW USER IN AGILITY

Please find the steps below for setting up users for Agility.

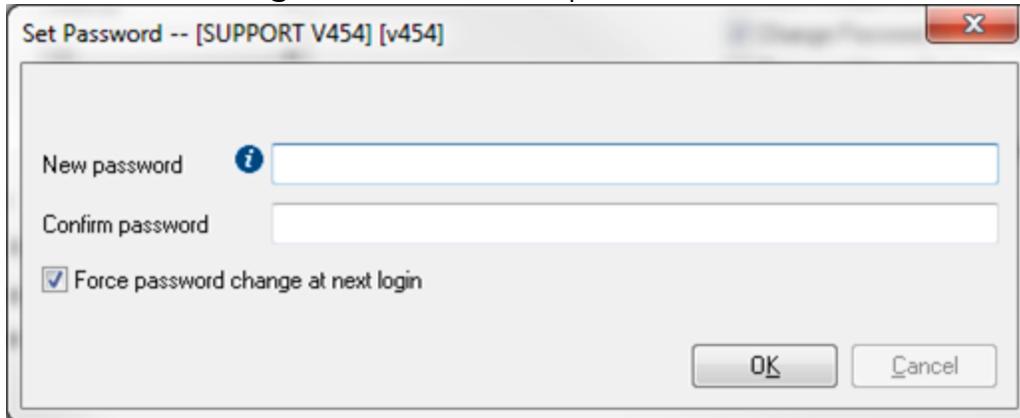
1. Go to System Administration > Security Administration > User Profiles
2. Each system comes defaulted with a New User account. Use the Search field to pull the user up. You can also choose a user that performs similar job functions as the new user you are creating. Type over the User ID and User Name.

The screenshot shows the 'User Profiles' application window. The title bar reads 'User Profiles -- [Support Branch] [v553 Devel]'. The menu bar includes 'File', 'Edit', 'Options', 'View', 'Window', 'Go To', and 'Help'. The 'Product' dropdown is set to 'Agility'. The 'Search by' dropdown is set to 'User ID', and the search input field contains 'new user'. Below the search bar is a toolbar with various icons. The search results show 'User ID' as 'New User' and 'User name' as 'New User'. A navigation bar at the bottom includes 'Profile', 'Products', 'Linked to Groups', 'Branches', 'Branch Groups', 'Group Defaults', and 'C'.

3. Enter the users email address.
4. Check the change password at next login flag. This will allow you to set a generic password for the user and then at their first login they will be prompted to change the password.

The screenshot shows the 'User Profiles' application window with the user profile configuration page for 'New User'. The title bar reads 'User Profiles -- [Support Branch] [v553 Devel]'. The menu bar includes 'File', 'Edit', 'Options', 'View', 'Window', 'Go To', and 'Help'. The 'Product' dropdown is set to 'Agility'. The 'Search by' dropdown is set to 'User ID', and the search input field contains 'new user'. Below the search bar is a toolbar with various icons. The search results show 'User ID' as 'New User' and 'User name' as 'New User'. A navigation bar at the bottom includes 'Profile', 'Products', 'Linked to Groups', 'Branches', 'Branch Groups', 'Group Defaults', 'Credit', 'Settings', 'G/L Security', and 'PartnerView/Mobile Sales'. The configuration page includes fields for 'Branch' (WOODLANDBRCH), 'User category' (Internal), 'Phone format' (USA), 'Phone', 'Fax', and 'Employee ID'. The 'Email' field is highlighted with a red box. A checkbox labeled 'Change password at next login' is checked and highlighted with a red box. Other checkboxes include 'Use debug feature', 'Allow multiple sessions', 'Password never expires', 'Account disabled', 'User for 3rd party batch processing', 'Access system when locked', and 'Access private branches'. There are also fields for 'Use as From email for forms' and 'Fax notification return email'.

5. Click save, you will be prompted to create a new record. – Click Yes.
6. You will be prompted to Set the Password. Use something generic like Happy123 and use the same thing for each user. They will be changing it at first login from above step.



7. Copy Template User Settings – Make sure all are checked and click OK



8. Have the user log into Agility to make sure everything is working correctly.