Users and Roles:

There is no limit to the number of users per firm.

There are currently three types of Users with five defined roles.

Administrator: Has total access to all system screens and functions.

User4: Has the same access as Administrator, but no access to management reports. User4 does have access to **Billing Reports** which are Log Reports, Accounts Receivables Summary and Detail Financial Reports but not Productivity, Practice Area or Office Summary Reports.

User3: Has the same access as User4, but no access to any Reports management or billing reports.

User2: Has the same access as User3, but no access to the Clients Screen.

User: Has the same access as User 2, but limited to User entries only on the Log and Prebill.

User1: Hours only and Log only, cannot access fee rates or fee Calculations. User1 is the most limited.

Administrators can Activate, Deactivate and Edit Users.

Go to the Settings screen to Office Settings (the default).
The User Screen is the left panel of the screen.
To Activate a User: Click the New button top of the Active tab and fill out the popup screen with Username, User Password, User Default Hourly Rate and Initials. Select the Users role, Admin, User, User1 and User2. Save.
To Edit a User: Select the user and Click the Edit button top of the Active tab. Make your Edits on the popup Edit screen. If you are changing the Users default hourly rate you will be asked if you want to change for all preexisting clients and then if you want to recompute user unbilled entries times the new hourly rate for the user. You can change User Hourly Rates for only new clients by responding “NO” to the first Popup screen. Save
To Deactivate a User: Select the User and click the Deactivate button top of the Active Panel. Save.
To Reactivate a User: You can reactivate the user at any time by selecting the Inactive tab, select the user and click the Reactivate button. Save.