

# How to Setup New Users in SedonaSetup

07/18/2025 10:28 am EDT

Setting up Users is a two-step process. The first step is to create the User record in the Users table, and the second step is to set up those Users in the Employees setup table.

## Overview

This document assumes the User adding data into SedonaOffice has the proper user permission. The document also assumes SedonaSetup is open. These steps can be performed for SedonaOffice versions 6.2.0.x and higher.

## Steps:

### User Setup

1. Open Users – Click on the New button.
2. Fill in all information for the new user as shown below.
3. Enter a default password like Apple!2. The system will ask the user to change their password at 1<sup>st</sup> login.

**NOTE:** The password entered for each user is encrypted; if a user forgets their password, the company's system administrator will need to change or re-enter and save the password here in SedonaSetup > User.

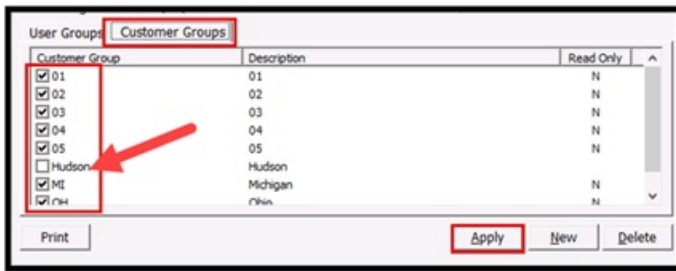
4. Select the User Groups, in the User Group Tab, for the permissions that the user will have.
5. If the user can add new users, click on the "Create Other Users" option.
6. Click "Apply" to Save.

**NOTE:** If Customer Group Security has been activated in the **Setup Processing for Accounts Receivable**, continue for additional setup instructions.

<input type="checkbox"/> Locked	<input type="checkbox"/> Inactive
User Code: RSHAWLEY	<input checked="" type="checkbox"/> Create Other Users
Password: [Redacted]	First: Renee
Confirm Password: [Redacted]	Middle Initial: [Redacted]
Description: Admin User	Last: Shawley
Last Login: 7/16/2025 9:35:54 AM	E-Mail: ReneeS@boldgroup.com
<b>User Groups</b>	
<input checked="" type="checkbox"/> Administration	Administration
<input checked="" type="checkbox"/> Administrator	Administrator
<input type="checkbox"/> Accounting Clerk	Accounting Clerk
<input type="checkbox"/> Admin	Admin
<input type="checkbox"/> Data Entry Job	Data Entry Job
<input type="checkbox"/> Dealers	Dealers
<input type="checkbox"/> Dealers View	Dealers View with Notes
<input type="checkbox"/> Inventory Clerk	Inventory Clerk
Print	Apply New Delete

7. If the company uses Customer Groups, click on the Customer Groups Tab before saving the record.
8. Select all the Customer Groups that the user will have access to in SedonaOffice.

**NOTE:** If a Customer Group is not selected, then that user **would not** have access to any of the customer records in the database.



- To make a Customer Group, to which a User has been granted permission, to be set as Read Only, the User will be able to view the customer information, but will not be able to make any changes to the data.

To activate the Read-Only Function of a Customer Group, highlight the Customer Group, right-click, and select the Read-Only option.



- Click Apply to save all changes.

### Employee Setup

- Open Employee Setup, then click on the New button to add an Employee.
- Fill in the Employee Code - All information in the General Tab that is highlighted in RED is required.

- Click on the other tabs to fill in any required information that is needed - these tabs do not need to be filled in to save the record.

Employee Edit  Inactive

Employee Code

General Information **Payroll** | Commission Setup | Documents

User Code  First Name

Type  Last Name

Assigned To  Middle Initial

Supervisor  Date of Hire

Termination

Job Approval Group

Created: Administrator 3/1/2021  
Updated: Administrator 5/11/2021

**Apply** | New | Delete

- Click on Apply after all data is entered.

The new user can now log into SedonaOffice. The user will be asked to change their password after the 1<sup>st</sup> login is completed.

