SnapTracker Webinar Wednesday May 17<sup>th</sup> 2017

# User Setup and Requisition by Condition

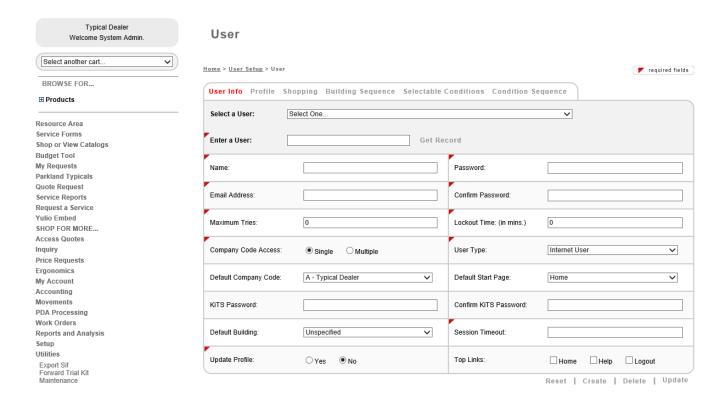
# Agenda

- Review how to create user in SnapTracker
- Showcase how to setup requisition cart by condition
- Q&A



## User Setup

- To start every user needs to have a basic profile created
- A User Profile contains the name, email and password for the user among other things
- Once the profile exists there are 3 important things each profile needs



# Three Things a Profile Needs to login

#### 1. Building Access

- All profiles must have at least one building to access
- Since building is where all inventory is stored
- The building is accessed through Utilities – User Setup – Building Access

#### 2. Customer Access

- The profile must have at least one customer to access
- Customer represent the unique inventories in SnapTarcker
- The customer is accessed through Utilities – User Setup – Customer Access

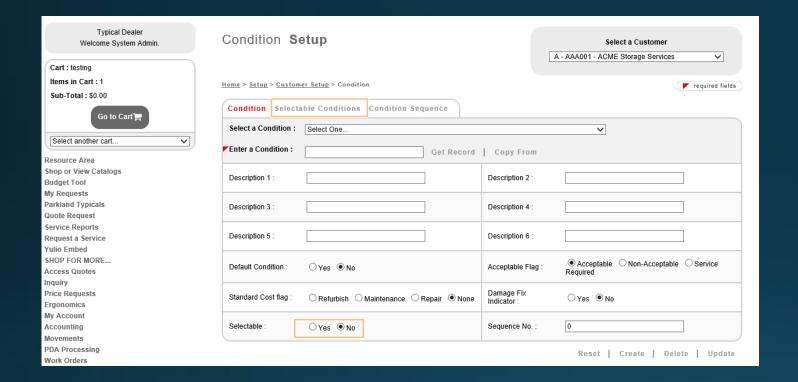
#### 3. Menu Access

- In order to login every profile needs at least <u>one</u> Menu to access
- Menus determine what the individual profile can do while they are in SnapTracker
- Do they only see inventory or do they have full admin rights
- To access the Menu go to Utilities
  User Setup Menu Access

# Requisition by Condition Codes

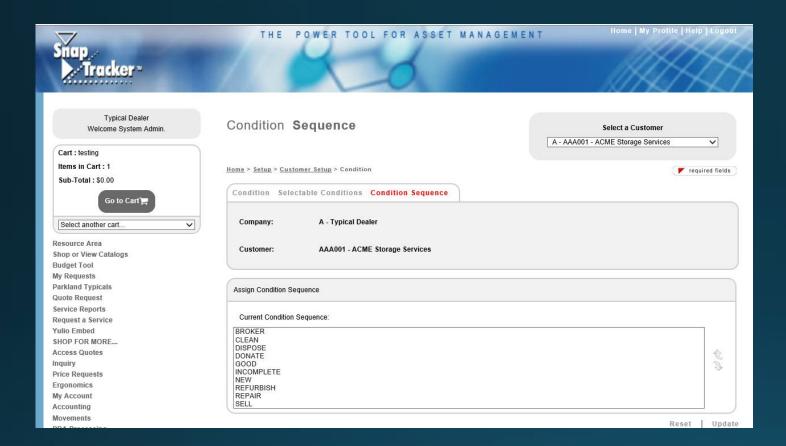
- What's the advantage?
- Better accuracy on pulls
- the advantage is that people who have access to product will only view the conditions you want them to see
- prevents un-acceptable (undesirable) conditions from being selected
- Create the right visibility for each user-type

- To enable the request product by condition
- There can be no open work orders or reservations
- Enable at the customer screen
- Select and prioritize all condition codes (condition menu)
- Select and prioritize conditions at the user level



### Selectability

- All conditions codes must be switched to selectable in order to be viewed why using requisition by condition
- If a condition code that is no selectable is assigned to the product no one will be able to see the item in inventory, this includes system admin



# Condition Sequence

- In situations where the user requesting product doesn't want to select a specific condition code the administrator can determine the order in which conditions are selected
- This is done by the condition code sequence and it sets the priority and eligibility for the user
- If the user does not have access to the specific condition it will not appear in the list of available conditions

Next Week May 31th 2017

# SnapTrackerTemplate Customization