



How to Setup CFAWin8 User IDs

User IDs should be set up for each person that will access CFAWin8.

- Admin or System Ops privileges are required to access the User Id Table.
- Users are assigned per Company Profile.
- Drivers and Mechanics must have a User Id created in CFAWin8 to be selected on transactions.
- Access Rights should be removed for all users not accessing CFAWin8. This is done by unchecking all boxes and setting remaining options to either No Access or None (including Driver and Mechanic boxes.)

I. Add New User Id

1. Click on System Setup
2. Click on Setup Tables
3. Select an existing User Id to use as a template and click New, otherwise just click New
4. Enter the new User Id name
 - i. User Id may be up to 10 characters in length
5. Click OK
 - i. A message will appear "User, do you want to use User Id: 'XXXX' as a template?"
 - Select Yes to provide the same rights as the previously selected User Id
 - Select No if you would like to customize user rights of the new Id
6. Assign Access Rights if User Id was not created from a template
 - i. See CFA8 SETUP User Id Levels FAQ for Access Rights details
7. Enter the Password, First Name, Last Name, Employee Id, and Notes as needed
8. If the User Id is a Driver, select the Driver checkbox
9. **If the user Id is a mechanic, select the Mechanic Checkbox**
 - i. Enter an individual Labor Rate if it differs from the global labor rate
 - ii. Enter the Overtime Factor that should be charged for overtime hours
10. Click Save

II. Modify User Id

1. Click on System Setup
2. Click on Setup Tables
3. Select the User Id to modify
4. Modify necessary fields
5. Click Save

III. Delete User Id (Should only be necessary for unused User Ids)

1. Click on System Setup
2. Click on Setup Tables
3. Select the User Id to delete
4. Click the Delete icon
 - i. User Status should reflect Deleted and the table is now ready to be purged