

Create a new user

To create a new user in Opera 3 follow the steps below: Log into Opera 3 as a User with Manager rights. Go to the Administration > System > Maintenance > User Profiles screen.

🚯 Pegasus Opera 3 - Orion Vehicles Leasing			
Administration Favourites Financials Supply Chain Manageme	ent CRM Document Ma	nagement Payroll & HR Reporting	
🚬 🎢 🙀 🚔 🌡 Preferences 📃 Utilities *	Maintenance 🔰 🍰 Import Wi	zard 📑 Pegasus Opera Fixed Assets	
Logon Date & PWX MTD VAT Bespoke VAT Reports	People Profiles	🕒 System Upgrade	
Company Centre Centre Activations	User Profiles	Ungrade	
System	Company Profiles	opgrade	
	Exchange Rates	User Profiles : ADMIN - The Administrator	
	Report Layout	General Menu Access Credit Management List	
	😪 E-Mail Profiles	User ID : ADMIN	
	🔏 Task Manager	User Name : The Administrator	
	Additional Systems		
		Password : ****** Verify : ****	****
		Manager Rights	
		Access Private Details	
		Continuous Posting	
		SOP doc default : Order 🗸	
		SPM Access Rights : Full access to all records	
		Allow Access to Companies Make Member of User Grou	ps
		Orion Vehicles Leasing	
		Administrators	
		0	
		View	4

If you are setting up a user based on an existing user then find the user in the list and select the Copy Data icon from the toolbar or CTRL+M.

🚯 User Profil	les : USER - Mr Smith	- • ×
General Me	enu <u>A</u> ccess Credit Management	List
User ID	Na	ame
ADMIN	The Administrator	
MANAGER	The Manager	
USEK	Pr Smot	
2		Close
View		

www.profile.co.uk tel: 01442 236311

Enter required user credentials.

Use the F1 Help or select the Icon 2 from the toolbar to determine which checkboxes are required for your user.

🌎 User Profiles : Nev	v User		- • •
<u>G</u> eneral Menu <u>A</u> cce	ss Credit Manage	ment List	
User ID :			
User Name :			
Password :		Verify :	
	Manager Rights	Expiry :	31/12/2099
	Continuous Post)etails ing	
SOP doc default :	Order ~		
SPM Access Rights :	Full access to all re	cords 🗸	
Allow Access to Comp	oanies	Make Member of Us	er Groups
☑ Orion Vehicles Leasing		Accounts department Administrators Everyone	
			Close
New			li

Select CTRL+S or the save Icon \blacksquare from the toolbar.



If you are creating a new user not based on an existing user, then. Go to the Administration > System > Maintenance > User Profiles screen.

Select CTRL+N or the save Icon ¹ from the toolbar.

Enter required user credentials.

Use the F1 Help or select the Icon if from the toolbar to determine which checkboxes are required for your user.

Select the Menu Access tab and untick any modules not required for the new user. It defaults to all.

📢 User Profiles : PROFILE - Profile User					
<u>G</u> eneral	Menu <u>A</u> ccess	Credit Management	List		
Menu V	iew : Main Me	ะทน		~	
Image: Sales Image: Soles Image: System I					
2				Close	
New					//



Use the Menu View dropdown to fine tune the access the user has.

🚯 User Profiles : PROFILI	E - Profile User	
General Menu Access	Credit Management	
Menu View : Sales Pro Sales Pro Sales Pro Sales Pro Sales Pro Sales Vie Sales Vie Sale	ocessing Actions pocessing Actions rchase History Actions ee View Actions ilities Set Options Action ew Actions ew Trans Drill Actions ng nt Is llocation	
2		Close
New		li.



Select the Credit Management tab and fill in the required detail.

📢 User Profiles : PROFILE - Profile User	
General Menu Access Credit Management	
Access Company details page All users' diaries	
Debt Management e-mail	
Sender address :	
Sender name :	
	<u>C</u> lose
New	1.

Select CTRL+S or the save Icon \blacksquare from the toolbar to create the new user.



Log in as the user and set up the user preference as required.

Use the F1 Help or select the Icon if from the toolbar to help with which checkboxes are required for your user. Select Save.

🚯 Peg	asus Opera 3 - Orion Vehic	les Leasing	
	0 3 =		
	Administration Favo	ourites Financials	Supply Chain Management C
Logon	Date & PWX MTD VA Company Centre Centre	Areferences Spooler Control e System	Utilities * Mainter VAT Processing * Schedul Bespoke Activations
ĺ	S Preferences		x
	General Workstation Se	ttings	
	Default Company :	Z 🗸 Orion Vehicle	es Leasing
		Confirm Show Accelerator Ke Grey And White Grid Use Extended Searc Auto Clear	≥y Toolbar I thing
	Menu Style :	Navigation Pane Ribbon Bar	Auto hide the Navigator
	Toolbar Size :	Small (Default)	
	Default Search :	Match Any Word Ignore Case Include Deleted	
	Reporting :	Use Opera PDF Prin Advanced Previews	ter
	Change Password :	Remember form pos	itions and sizes <u>R</u> eset All
	Web Page to Display		Test
	Action -		OK Cancel

Log out and back in as the user and test to see that the required access is set.