

MicroBiz Security

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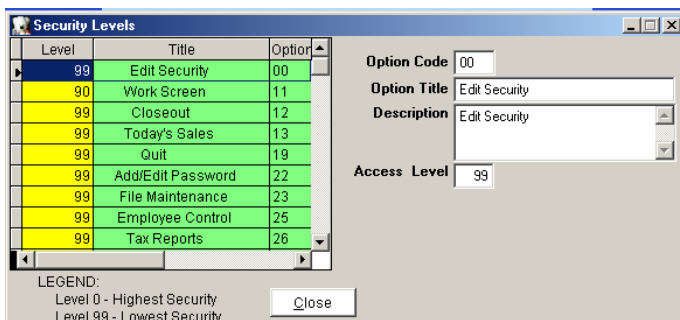
Along with the latest version of X-Charge 7.0.1, MicroBiz has taken the steps in version 12.5 to become PCI compliant by removing credit card information in the latest version - 12.5. While this will help protect your credit card information, MicroBiz has many other security functions that will allow you to protect other sensitive information that you may not want your employees or customers to have access to.

Username/Passwords

The first step in adding security to MicroBiz is to add usernames and passwords for all employees who are using MicroBiz. This can be done through: **“Management” - “Add/Edit Password.”** You will need to use the “Add” button to add a new user. Enter in the login name and security number. Note that Level 0 is for higher security users (managers) and Level 99 is for lower security users (employees). You will want to create at least one administrator username with security set to 0, meaning they can have access to every function in the program. **Make sure you remember your administrator username and password, as MicroBiz Support will not know this information.** When you have all employees set up, click on the “Save” button to save your changes.

Security Levels

Next, you will want to edit your security levels. This can be done through: **“Management” - “Edit Security Level.”** You will see a list of all of the available functions in MicroBiz. The number for these functions will need to be changed according to the level you have set for your employees in “Add/Edit Password.” It is recommended that you make sure that “Edit Security” and “Add/Edit Password” are both set to level 0 so that only the administrator can make changes to security.



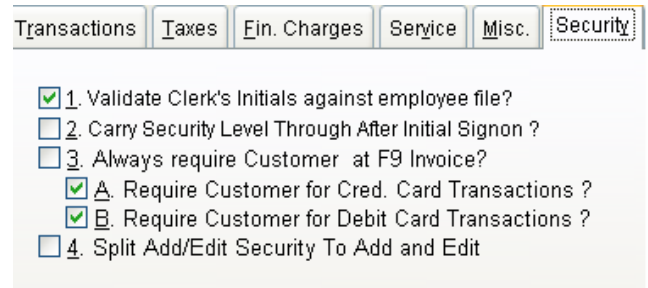
Level	Title	Option
99	Edit Security	00
90	Work Screen	11
99	Closeout	12
99	Today's Sales	13
99	Quit	19
99	Add/Edit Password	22
99	File Maintenance	23
99	Employee Control	25
99	Tax Reports	26

Option Code: 00
Option Title: Edit Security
Description: Edit Security
Access Level: 99

LEGEND:
Level 0 - Highest Security
Level 99 - Lowest Security

“Transaction Settings” – “Security”

Other functions for security can be found in **“Management” - “Customize” - “Transaction Settings” - “Security”** tab.



Transactions Taxes Fin. Charges Service Misc. Security

- 1. Validate Clerk's Initials against employee file?
- 2. Carry Security Level Through After Initial Signon ?
- 3. Always require Customer at F9 Invoice?
 - A. Require Customer for Cred. Card Transactions ?
 - B. Require Customer for Debit Card Transactions ?
- 4. Split Add/Edit Security To Add and Edit

#1 Validate Clerk's Initials against employee file? - If this option is checked, MicroBiz will cross-check the initials in **“Management” – “Add/Edit Password”** with **“Management” – “Employee Control.”** This option would be recommended if you use the “Time Clock” or “Commission” features in MicroBiz.

#2 Carry Security Level Through Initial Signon? - If this option is checked, MicroBiz will only prompt you ONCE for username and password when you enter MicroBiz. Based on the security level of the user logged in, MicroBiz will only allow access to functions associated with that user.

#3 Always Require Customer at F9 Invoice? - If this option is checked, you MUST have a “F8-Cust” loaded to the Work Screen before completing a sale. The below “A.” and “B.” options will require a “F8-Cust” loaded to the Work Screen based on whether you tender using the “Credit” or Debit” options.

#4 Split Add/Edit Security to Add and Edit - If this option is checked, two new security levels will be added in **“Edit Security Level”** for “Add Product” and “Edit Product.” By default, the security levels will be set to 0 (highest security). This is a useful option if you want different security levels for both editing and adding products.

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