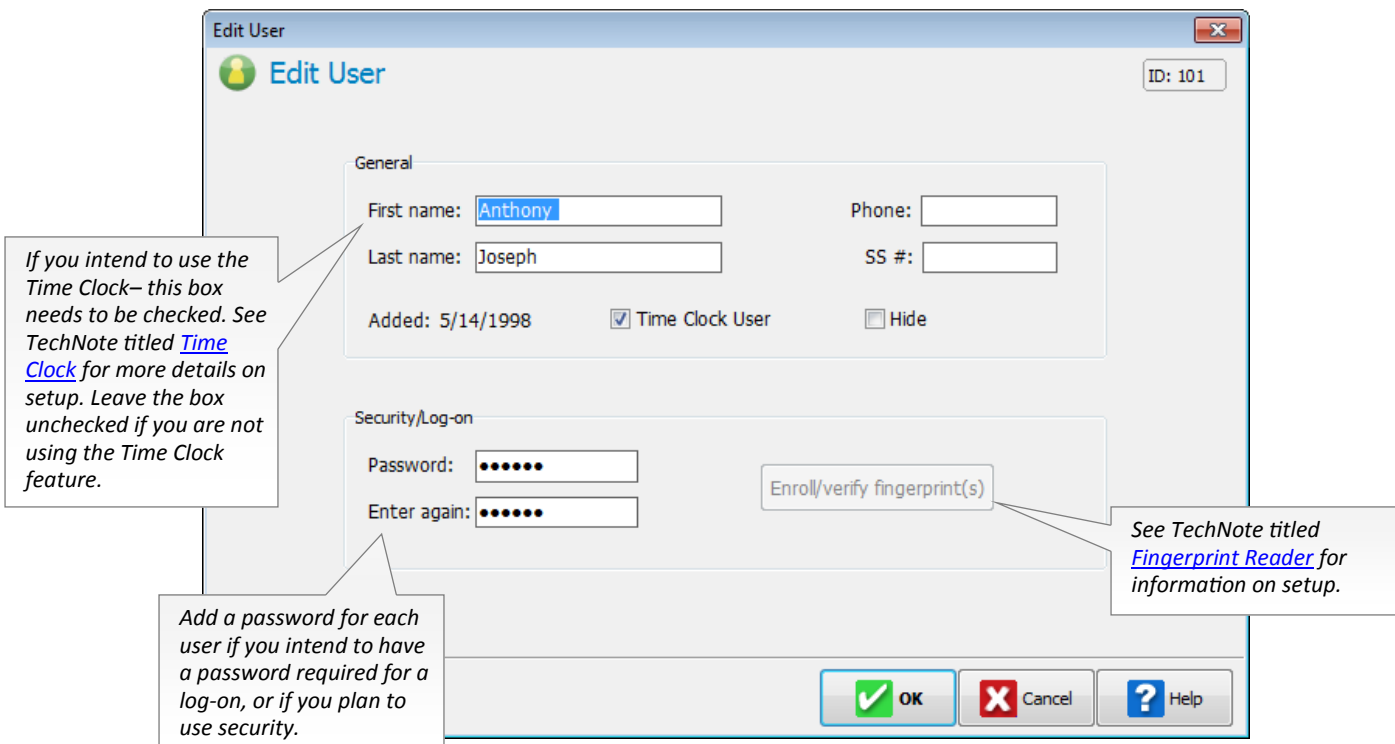


To access Security Settings and Log-On Settings, close PostalMate and the POS and open PM Utilities (**Start > All Programs > PostalMate > PM Utilities**). If you run PostalMate on a network, many of these settings are only available on the Master station.

From PM Utilities, choose the **Security Settings** button.



Users must be added in order to use either Log-on or Security. Choose **Add/Edit Users** from the General Security tab. Choose **Edit** (to edit existing Users) or **Add** (to add new users).



Edit User (ID: 101)

General

First name: Phone:

Last name: SS #:

Added: 5/14/1998 Time Clock User Hide

Security/Log-on

Password:

Enter again:

If you intend to use the Time Clock– this box needs to be checked. See TechNote titled [Time Clock](#) for more details on setup. Leave the box unchecked if you are not using the Time Clock feature.

Add a password for each user if you intend to have a password required for a log-on, or if you plan to use security.

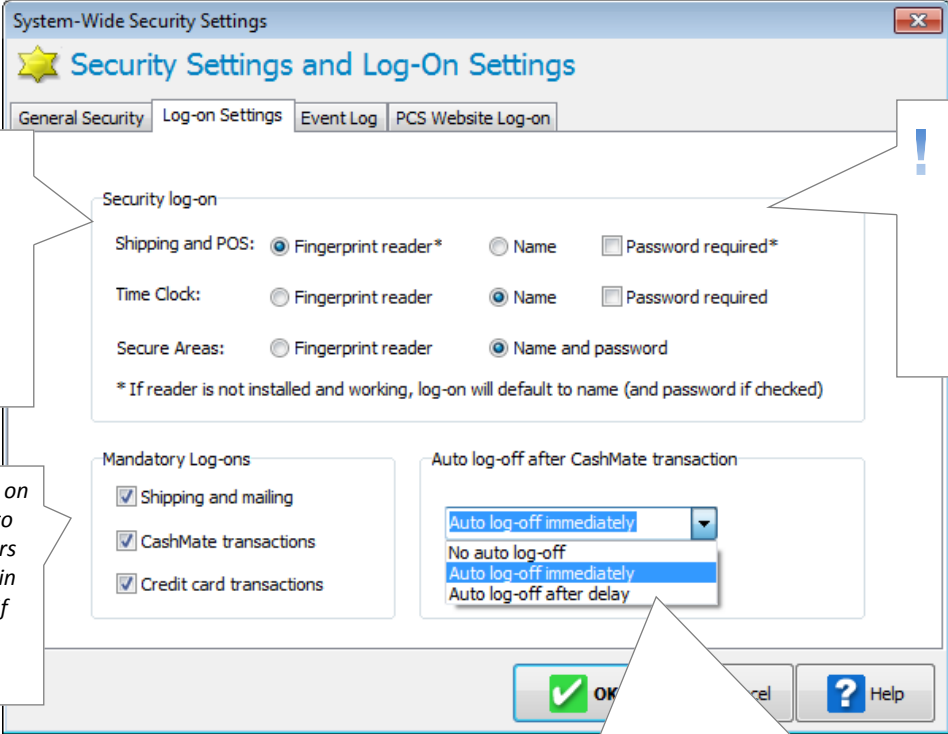
See TechNote titled [Fingerprint Reader](#) for information on setup.

The log-on feature may be used with or without Security enabled.

- See Page 2 for information on setting up Log-on's.
- See Page 3 for information on setting up Security.

Log-On Settings

You can set up PostalMate and the POS to require a log-on.



Choose how Users (employees) will log-on:

- ▶ Fingerprint reader*
- ▶ Name only
- ▶ Name with Password

* Requires a Digital Persona 4500 reader

Security log-on

Shipping and POS: Fingerprint reader* Name Password required*

Time Clock: Fingerprint reader Name Password required

Secure Areas: Fingerprint reader Name and password

* If reader is not installed and working, log-on will default to name (and password if checked)

Mandatory Log-ons

- Shipping and mailing
- CashMate transactions
- Credit card transactions

Auto log-off after CashMate transaction

- Auto log-off immediately
- No auto log-off
- Auto log-off immediately
- Auto log-off after delay

Default options for POS log-off:

- ▶ No Auto log-off: User remains logged in until the program is closed or until they log out.
- ▶ Auto log-off immediately: User is logged out after each transaction.
- ▶ Auto log-off after delay: Specify how many minutes a user should remain logged in.

! If using a fingerprint reader, make sure to also select Password required. This will enforce passwords for instances when logging on without a fingerprint reader.

Shipping and mailing (PostalMate) Log-on: You can track which employees have processed what shipments in PostalMate by requiring a log-on to ship or mail. In Package History, you can see who was logged in to process the shipment by selecting the General Info tab and look for “User.”

CashMate transactions Log-on: Forcing a log-on to the POS allows you to see which employees have processed which transactions and also allows you to track which employees have cancelled or voided transactions in the POS. (**Reports > System Wide > Event Log**). Use passwords or a fingerprint reader for additional security. **Note: Logging into PostalMate for a shipment will carry the log-on information over to the POS to complete the sale (on the same station) so you will not have to log-on again.**

Credit card transactions: If you use a credit card interface that allows stored credit cards in the POS, a user must be logged in to add credit cards as well as to process sales or returns to stored credit cards.

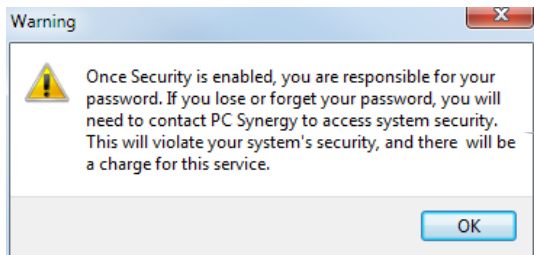
Security Settings

From **Security Settings and Log-On Settings**, choose the **General Security** tab. *(Each user must have a password to use security.)*



Universal Access: At least one user (usually an owner or a manager) needs to be set up with Universal Access. Universal Access rights allow you to log in with a password (or a simple touch of a fingerprint reader) to any secured areas.

Select Access: Set other employees with select access rights. Placing a checkmark in the box next to any of the “secure areas” gives that employee rights to enter that secure area with their password. Leaving a secure area unchecked means that you don’t want the selected employee to be able to access that area. See page 5 for a complete listing of secure areas.



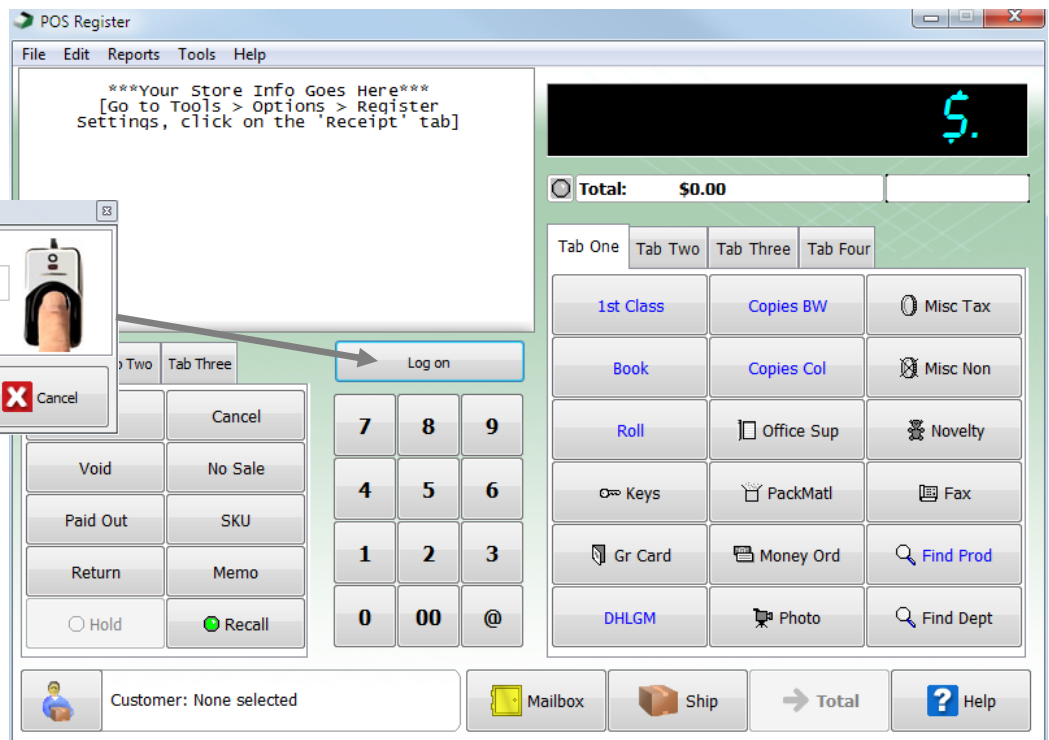
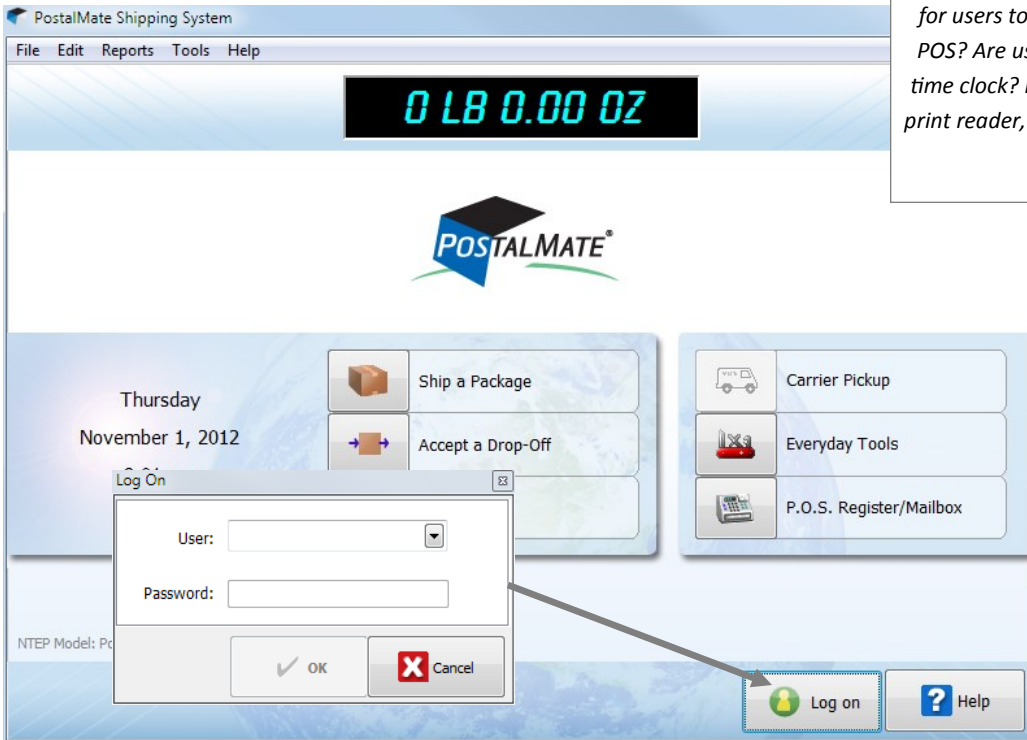
Setting up security should be done with intention and caution.

Break Security: If you have forgotten or misplaced your password and need to break security, open PM Utilities and choose **Tools > Security > Break Security**. Follow the on-screen instructions.

Logging On...

Your settings will determine how and when you log-on to each program. Is it mandatory for users to log-on to PostalMate and the POS? Are users required to punch into the time clock? How do they log on... by fingerprint reader, by name or name & password?

See pages 1-3..



Secure Areas

- **Billing and Late Fees :** Opening, closing and editing accounts. Printing, re-printing statements. Credits, payments, deposits and late fees. Editing statement groups.
- **Configuration:** PostalMate settings, Email notification settings, Register settings, Sales tax settings, shipping settings, EnVista settings.
- **Data Maintenance:** Department mapping, adding and making changes to mailbox inventory and entering existing accounts. Set department order, restore backup, undelete tax regions, network station settings.
- **Disbursement:** Manual buy postage for Printable postage.
- **Inventory:** Adjust Inventory and Receive products.
- **PCS Auto Login:** PostalMate website auto-login.
- **Price Override:** Override product pre-set pricing.
- **Pricing:** Editing, adding or deleting products or departments. Mailbox setup and preferences. Edit shipping carrier, or any rates. Adding or editing Vendors.
- **Register Activities:** Cancelling or voiding sales. Opening or closing the register day. No sales, paid outs and voiding register transactions. Accessing customer credit card information (if entered) in Edit Customer.
- **Reports:** All reports in PostalMate, POS, PM Utilities and Time Clock.
- **Saved Credit Cards:** Allows access to adding and using the stored credit card feature for PayWare Connect and Cayan Genius credit card interfaces.
- **Security:** Accessing Security settings in PM Utilities.
- **SelfServe:** Not used.
- **Time Clock Management:** Accessing reports and making changes to punches in Time Clock.
- **Users:** Adding, editing or deleting Users.