



# **Red Cherries Accounting (Open Source)**

## **User Role Manager Module**

### **User Role Manager User Guide**

Version 1.1



## Table of Contents

|                                     |    |
|-------------------------------------|----|
| Introduction.....                   | 2  |
| Top Navigation Bar.....             | 3  |
| System Module Sections.....         | 4  |
| System Module Section Features..... | 5  |
| System Language Pack.....           | 6  |
| Default User Roles.....             | 7  |
| Derive User Roles.....              | 8  |
| Permissions.....                    | 9  |
| Default User Role Permissions.....  | 10 |
| Derive User Role Permissions.....   | 12 |
| Users.....                          | 13 |



## Introduction

This user guide aims at giving you the information required to work with “User Role Manager” module. This user guide can be downloaded from “User Roles Help” screen shown in **Figure 2** which is accessible from “User Roles → Help” menu as shown in **Figure 1**.

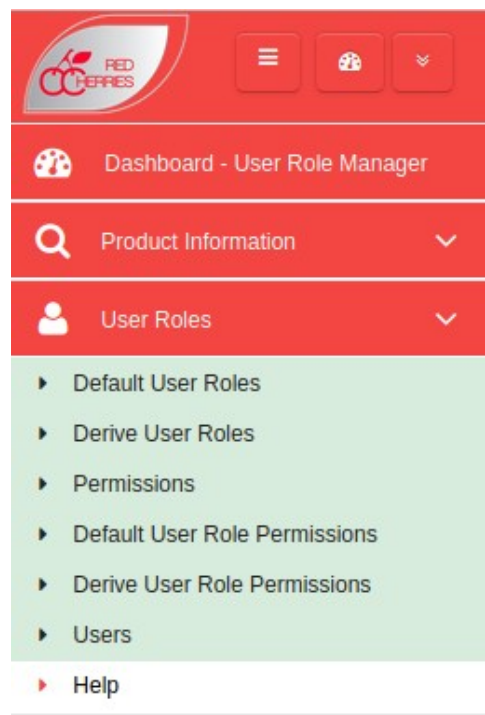


Figure 1

## User Roles Help

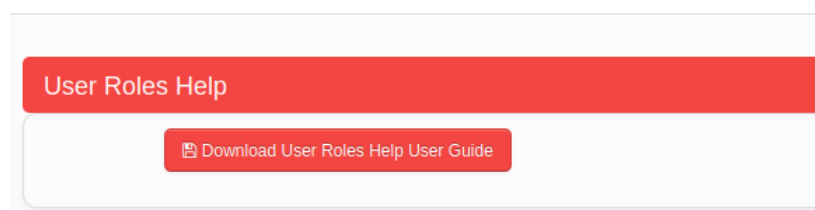


Figure 2



## Top Navigation Bar

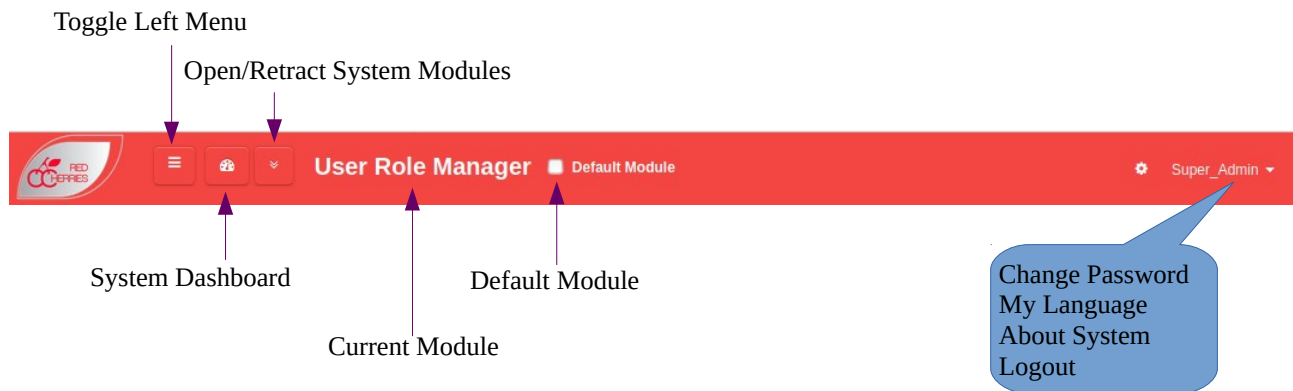


Figure 3

- **Toggle Left Menu** : Show/hide left menu
- **Open/Retract System Modules** : Open/retract system module dashboard. Previous screen preserves if user does not select any module.
- **System Dashboard** : Opens the system modules dashboard. Previous screen does not preserved.
- **Current Module** : Shows the current module that user has selected.
- **Default Module** : Selecting current module as default module will allow to go directly to that module on login to the system.



## System Module Sections

“Red Cherries Accounting” is structured as “System Modules” and inside each “System Module” there are “System Module Sections”. “System Modules” and “System Module Sections” are enabled in “Red Cherries Accounting” according to the list of modules and sections purchased by a customer. Modules and sections are enabled in a “Red Cherries Accounting” software license file issued to a customer.

System Module Sections screen in “Red Cherries Accounting” can be accessed from “Product Information → System Module Sections” menu.

**Figure 4** shows “System Module” list and “System Module Sections” of each “System Module” and their statuses.

### System Module Section Details

| 10 records per page           |                     |         | Search: <input type="text"/>  |
|-------------------------------|---------------------|---------|---|
| System Module                 | Module Section      | Status  |   |
| User Role Manager             | Product Information | Enabled |   |
| User Role Manager             | User Roles          | Enabled |   |
| Service Manager               | Administration      | Enabled |   |
| Service Manager               | Administration      | Enabled |   |
| Service Manager               | Administration      | Enabled |   |
| Service Manager               | Donation            | Enabled |   |
| Service Manager               | Reports             | Enabled |   |
| Service Manager               | Reservation         | Enabled |   |
| Organization                  | Administration      | Enabled |   |
| Organization                  | Organization        | Enabled |   |
| Showing 1 to 10 of 13 entries |                     |         | <a href="#">← Previous</a> <a href="#">1</a> <a href="#">2</a> <a href="#">Next →</a> |

Figure 4



## System Module Section Features

Each “System Module Section” of a “System Module” can have one or more “System Module Section Features”. System Module Section Features screen in “Red Cherries Accounting” can be accessed from “Product Information → System Module Section Features” menu.

**Figure 5** shows how “Module Section Features” of each an every “System Module Sections” are organized.

### System Module Section Feature Details

| 10 records per page Search: <input type="text"/> |                |  |
|--|----------------|--|
| System Module                                    | Module Section | Module Section Features  |
| Accounts Manager                                 | Administration | <div>Chart of Accounts</div> <div>Prime Entry Book</div> <div>System Configurations</div> <div>Accounts Manager Dashboard</div> <div>Bank</div>  |
|  | Bookkeeping    | <div>Journal Entry</div> <div>General Ledger</div> <div>Purchase Note</div> <div>Sales Note</div> <div>Customer Return Note</div> <div>Supplier Return Note</div> <div>Receive A Payment</div> <div>Make A Payment</div> <div>Cheque List</div> <div>Chart Of Account Balances</div> <div>Stakeholder Account Balances</div> <div>Opening Balances</div> |

**Figure 5**



## System Language Pack

“Red Cherries Accounting” allows users to change software system strings as shown in **Figure 6**. System Language Pack screen in “Red Cherries Accounting” can be accessed from “Product Information → System Language Pack” menu.

- Users can select “Language”, “System Module”, “Screen” and “String Type” to filter software strings.
- When change a translation system will automatically save the changes. Also, system will display “Generate Translations” button on the screen.
- To make the changes effective, users should click on “Generate Translations” button and generate the language pack for the selected language.
- If there are language errors, users can reinstall language pack by clicking on “Reinstall Language Pack To Solve Language Translation Issues” button. Reinstalling language pack will lose any string translation changes done.

### System Language Pack

**Translation Generation is Pending**

Language  
English

System Module  
Organization

Screen  
Territory Screen

String Type  
All

Search

Reinstall Language Pack To Solve Language Translation Issues

Generate Translations

10 records per page

Search:

| System Module | Screen           | String Type    | String              | Translation         |
|---------------|------------------|----------------|---------------------|---------------------|
| Organization  | Territory Screen | Display String | Territories Details | Territories Details |
| Organization  | Territory Screen | Display String | Add New Territory   | Add New Territory   |
| Organization  | Territory Screen | Display String | Territory Code      | Territory Code      |
| Organization  | Territory Screen | Display String | Territory Name      | Territory Name      |

Showing 1 to 4 of 4 entries

Previous

1

Next

Figure 6



## Default User Roles

“Red Cherries Accounting” provides two default user roles shown in **Figure 7**. Any number of users can be created and assigned these two default user role types. Default User Roles screen in “Red Cherries Accounting” can be accessed from “User Roles → Default User Roles” menu.

### Default User Roles

Note : Default user roles are not modifiable.

| 10 records per page         | Search:     |
|-----------------------------|-------------|
| Role                        | Description |
| Admin                       | Admin User  |
| User                        | Normal User |
| Showing 1 to 2 of 2 entries |             |
| Previous 1 Next             |             |

Figure 7















## Derive User Roles

If users need to assign custom permissions apart from Default User Role permissions, they should create Derive User Roles using “Admin” or “User” Default User Roles. Derive User Roles screen in “Red Cherries Accounting” can be accessed from “User Roles → Derive User Roles” menu.

- Users can add a Derive User Role by clicking on “Add New Derive User Role” button shown in **Figure 8**.
- A new form shown in **Figure 9** will be opened to add a Derive User Role.
- For “Role” field users has to select a Default User Role type.
- After added a new Derive User Role, the list can be seen as shown in **Figure 8**.

### Derive User Roles

Add New Derive User Role

| 10 records per page |      |                      |   | Search:   |
|---------------------|------|----------------------|---|---|
| Role ID             | Role | Derive User Role     | Actions   |   |
| 4                   | User | Sales Assistant      |  |  |
| 5                   | User | Purchasing Assistant |  |  |
| 6                   | User | Payment Assistant    |  |  |
| 7                   | User | Accountant           |  |  |
| 8                   | User | Donation Manager     |  |  |

Showing 1 to 5 of 5 entries

Previous 1 Next

Figure 8

Derive User Roles

Role \*

-- Select Role --

Derive User Role \*

Derive User Role

Save

Refresh

Close

Figure 9



## Permissions

In “Red Cherries Accounting” each and every System Module Section Feature has permissions which can be assigned for user roles. There are main four permissions types (Add, Edit, Delete and View). **Figure 10** shows how the Permissions are arranged for each System Module Section Feature. Permissions screen in “Red Cherries Accounting” can be accessed from “User Roles → Permissions” menu.

### Permission Details

| 10 records per page <span>Search:</span> |                  |                |                         |  |
|--|------------------|----------------|-------------------------|--|
| System Module                            | Sub Module       | Module Section | Module Section Features | Permissions  |
| Service Manager                          | Donation Manager | Donation       | Collect Donations       | <div>Add Collect Donations</div> <div>Edit Collect Donations</div> <div>Delete Collect Donations</div> <div>View Collect Donations</div> |
|  |                  |                | Program Progress        | <div>Add Program Progress</div> <div>Edit Program Progress</div> <div>Delete Program Progress</div> <div>View Program Progress</div>     |
| Service Manager                          | Donation Manager | Reports        | Donation Reports        | <div>View Donation Reports</div>   |

Showing 9 to 10 of 13 entries

Previous

3

4

5

6

7


Next


Figure 10



## Default User Role Permissions

Each Default User role of “Red Cherries Accounting” has assigned set of Default Permissions. Those Default Permissions cannot be modified. Default User Role Permissions screen in “Red Cherries Accounting” can be accessed from “User Roles → Default User Role Permissions” menu. **Figure 11** shows how the Default User Role Permissions are assigned for Default User Roles.

If any System Module Section Feature needs to have permissions other than Add, Edit, Delete or View, such permissions are added as Advanced Permissions in “Red Cherries Accounting”. If any System Module Section Feature has Advanced Permissions, that will be denoted by  button as shown in **Figure 11**.

When clicked on  button, users can see a list of Advanced Permissions as shown in **Figure 12**.

### Default User Role Permissions Details

Default User Roles \* 

Admin

10 records per page

Search:


| System Module    | Sub Module | Module Section | Module Section Features    | Add Permission                      | Edit Permission                     | Delete Permission                   | View Permission                     | Advanced  |
|------------------|------------|----------------|----------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---|
| Accounts Manager |            | Administration | Chart of Accounts          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |   |
|                  |            |                | Prime Entry Book           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |   |
|                  |            |                | System Configurations      |                                     | <input checked="" type="checkbox"/> |                                     | <input checked="" type="checkbox"/> |   |
|                  |            |                | Accounts Manager Dashboard |                                     |                                     |                                     | <input checked="" type="checkbox"/> |   |
|                  |            |                | Bank                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |   |
| Accounts Manager |            | Bookkeeping    | Journal Entry              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |  |
|                  |            |                | General Ledger             |                                     |                                     |                                     | <input checked="" type="checkbox"/> |   |
|                  |            |                | Purchase Note              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |   |
|                  |            |                | Sales Note                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |   |
|                  |            |                | Customer Return Note       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |   |
|                  |            |                | Supplier Return Note       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |   |
|                  |            |                | Receive A Payment          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |   |

Figure 11



Advanced Permissions

☒ Add Advanced Journal Entry

Close

Figure 12



## Derive User Role Permissions

Derive User Role Permissions can be assigned for a Derive User Role as required. Derive User Role Permissions screen in “Red Cherries Accounting” can be accessed from “User Roles → Derive User Role Permissions” menu. **Figure 13** shows, how users can assign permissions by selecting a Derive User Role.

### Derive User Role Permissions Details

Derive User Roles \*

Purchasing Assistant

50 records per page

Search:

| System Module    | Sub Module | Module Section | Module Section Features    | Add Permission                      | Edit Permission                     | Delete Permission        | View Permission                     | Advanced |
|------------------|------------|----------------|----------------------------|-------------------------------------|-------------------------------------|--------------------------|-------------------------------------|----------|
| Accounts Manager |            | Administration | Chart of Accounts          | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |          |
|                  |            |                | Prime Entry Book           | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |          |
|                  |            |                | System Configurations      |                                     | <input type="checkbox"/>            |                          | <input type="checkbox"/>            |          |
|                  |            |                | Accounts Manager Dashboard |                                     |                                     |                          | <input type="checkbox"/>            |          |
|                  |            |                | Bank                       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |          |
| Accounts Manager |            | Bookkeeping    | Journal Entry              | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |          |
|                  |            |                | General Ledger             |                                     |                                     |                          | <input type="checkbox"/>            |          |
|                  |            |                | Purchase Note              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          |
|                  |            |                | Sales Note                 | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |          |
|                  |            |                | Customer Return Note       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |          |
|                  |            |                | Supplier Return Note       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |          |

**Figure 13**



## Users

Users of “Red Cherries Accounting” can be accessed from “User Roles → Users” menu.

- **Figure 14** show the Users list.
- A new User can be added by clicking on “Add New User” button shown in **Figure 14**.
- A new form shown in **Figure 15** will be opened to add a new User.

### User Details

Add New User





















| 10 records per page           |           |       |                      |        |  |  | Search:             |   |
|-------------------------------|-----------|-------|----------------------|--------|--|--|---------------------|---|
| Name                          | User Name | Role  | Derive Role          | Status |  |  |                     | Actions   |
|                               | Admin     | Admin |                      | Active |  |  |                     |       |
| Barry                         | Barry     | User  | Sales Assistant      | Active |  |  |                     |       |
| Bryan                         | Bryan     | User  | Purchasing Assistant | Active |  |  |                     |     |
| Clark                         | Clark     | Admin |                      | Active |  |  |                     |   |
| Colin                         | Colin     | User  | Sales Assistant      | Active |  |  |                     |   |
| Mark                          | Mark      | User  | Payment Assistant    | Active |  |  |                     |   |
| Paul                          | Paul      | User  | Purchasing Assistant | Active |  |  |                     |   |
| Terry                         | Terry     | User  | Payment Assistant    | Active |  |  |                     |   |
| Thomas                        | Thomas    | User  | Accountant           | Active |  |  |                     |   |
| Thomas-D                      | Thomas-D  | User  | Donation Manager     | Active |  |  |                     |   |
| Showing 1 to 10 of 10 entries |           |       |                      |        |  |  | - Previous 1 Next - |   |

Figure 14



## User Details

User Details

Employee \*

-- Select --

User Name \*

User Name

Password \*

Password

Confirm Password \*

Confirm Password

Default User Roles

-- Select --

Derive User Roles

-- Select --

Status \*

-- Select --

Save

Refresh

Close

Figure 15