Activating Stock Take Password

To activate the function to use a password for **Stock Take**, open the Parts/Materials parameters windows from the **Inventory** tab in the Opto Ribbon (see below). Ensure that the **Password required for Stock Take** tick boxes are ticked, then **press** <**F9**> to save and continue.



Set Permissions

From the OPTO ribbon, select the 'Resources' tab and **click** on the 'New/Edit Employee' icon to open the 'Employee Details' window. In the *Emp No* field enter the required employee number or **press** <**F2**> and select the employee from the pop-up list and **click** <u>OK</u>. **Press** <**TAB**> to generate the employee details then **click** on the 'Security' tab to edit permissions. Ensure the *Stock Take Restrict* tick box (circled below) is <u>unticked</u> to enable the appropriate permission to this employee. Press <**F9**> to save.

Employee				
Emp No: Employee Name or Surnar	ne: Given Name: Middl	e Name: Initial: Cu	rrent Shift: 🖉	
1 JONES	Robert B	Sh	ift 1 👻 1	
Details More Info Security Emp Sched Pictures Notes QMS				
✓ Signature Purchase	Check - Clock Time	Send Production Order	-> History	
Change Client Code	Check - Jobs Back from History <- Production Order		oduction Order	
Change Supplier Code	Despatch Awaiting Add Transport Cancel - Production Order		ler	
 Show Financial History (Clients) 	Change Revision Tick in Parts Send Client Order -> History			
Show Financial History (Suppliers)	Change Material Code Back from History <- Client Order		ient Order	
[3] Hide Despatch Amount	✓ Delete Material ✓ [3] Credit Orders and Purchase, Orders Only		urchase , Orders Only	
Change Part Code	 Change Material Stock 	Cancel - Client Order	Return Goods	
✓ Delete Parts	 Lock/Unlock Parts for Editing 	✔ Create Invoice □ Chan	ge Credit, Desp Stop	
 Change Parts Stock 	Save Changes to Locked Parts Show Job Cost Screen ON-Hold (Clt)			
Create New Part Code	Substitute Items Edit History Order Book ON-Hold (Prd)			
 Create New Material Code 	Update Parts Cost Price Change Part Production Stop			
Password Despatch (Production) Allow Part Sell Price change (setup Param Client) 🗹 Show All Doc's (Incl No Public Access)				
 Password Despatch (Client Order) 	 Show Supplier Total 		\$ / Min \$ / Hr	
 Password Material Delivery 	Show Client Total Show Pick Date (Clt Callup) Emp Cost:	.6666 40.00	
Update - Parts (Utility)	☑ [3] Show Order/Invoice Total, plus Cost	Supervising:	.0000 .00	
Update - Material (Utility)	Use Div for selected Reports	hange Pick	1 0000 60 00	
✓ Add NCR or ECR	✓ Point Of Sale Access Co	ommission Charge:	1.0000 00.00	
✓ QA - NCR/ECR (Complete)	✓ Change Due Date in Order Book Bo	iss Rating: 1 👻	Qualifications apply	
 [3] Quote Fast Markup (Override) 	Purchase Restrict Sh	ow Callup Amt Budget:		
Release Client Orders	Stock Take Restrict	-		

Performing the Transaction

Upon saving a Parts/Material Stock Adjust, the employee now must enter their employee password to perform the transaction.

	Parts Stock Adjust	
Adjustment Type: 1 v Stock In/Out Adjustment Text: qwerty	Date: 25/03/2019 Based on: Image: On-Hand Qty Image: Image: One of the state	Minport Print Process
Import Path:	Enter Employee Password	e Non Stock Item
Part Code	This Stock. Take transaction and can only be done with the correct permission. Please enter your employee password first QK Qancel	On Hand Real On-Hand 1/O Adjust By
1	Material Stock Adjust	
Adjustment Type: 1 Stock In/Out Adjustment Text: qwerty	Date: 25/03/2019 Based on: On-Hand Qty Fro:07/07/2015 Emp No: Change Location	Umport Print Process
Import Path: Material Code	Enter Employee Password This Stock Take transaction and can only be done with the correct permission. Please enter your employee password first QK	On Hand Real On-Hand I/O Adjust By