

Maintaining Settings and Licenses

Software settings and application licenses help maintain control of your business by enabling staff access to the tools they need to perform their work.

In this course, we show how to maintain both.

Objectives

- Maintaining Settings
- Maintaining Licenses

Maintaining Settings

Access *Settings and Licenses* from the gear icon.

The Settings tab displays by default.

It shows a list of options for all applications along with a description for each, the related application, and the options' current value.

If you know the setting that you want to review, you can use the search field to find it.

For example, entering the term *cost* shows the related settings.

You can narrow the settings list to a specific application by selecting one from the *Filter by Application* drop-down menu.

Depending on the *Value* that you want to maintain, you can use the associated submenus to adjust the value - or enable or disable a check box.

Remember to *save* the changes.

Maintaining Licenses

Software licensing allows access to the various applications and features.

In Settings and Licenses, select the *Licenses* tab.

Propello includes several license packages.

The Enterprise-Wide License includes attributes available to everyone in the company. You do not have to assign users to an Enterprise-Wide License.

Point of Sale is an example of an Enterprise-Wide License

A *user-specific* license is one in which you assign individual users.

For example, the Epicor Retail Cloud Users license pane shows that there are 100 licenses with 99 assigned and one available.

To assign a user to a license, select the *Assign Users* link on the license pane.

A list of all users in the company displays and includes their username, first name, and last name.

The corresponding checkboxes in the Licensed column show who has the license assigned.

Use the search field to find a specific user or scroll through the list. You can also filter the list by authorization.

To update a user license, enable or disable their corresponding check box.

When finished, remember to *Save* the changes.

Other types of licenses include those that let you view and maintain registers and stores.

Selecting either *View Registers* or *View Stores* takes you to their respective page in Organization Maintenance.

In this example for *View Registers*, the window shows license information for both Standard and Mobile Point of Sale Registers.

Use the Store dropdown menu to narrow the list to a specific store or use the search field to find a particular register.

Choose *Search* after entering a search term or selecting a store to display the list of registers.

You can perform multiple functions on this window like adding a new register, copying a register, deleting registers, and exporting register details to Excel.

The *View Stores* function in *Multiple Stores* works much the same way as *View Registers*.

Here again, you can see the total number of licenses, the number assigned, and the number available.

Recap

As you can see, maintaining settings and licenses is critical to identifying access to specific features and applications.

For more information, refer to the help articles, videos, and guided learning.

In this course, we showed how to maintain settings that drive user behaviors and licenses to permit access to Propello applications.

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