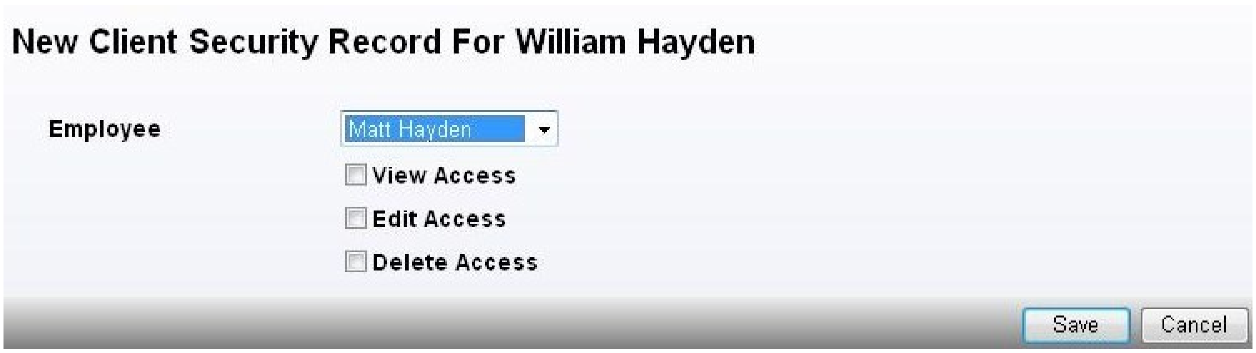
Client Security

Clients can be secured to restrict access to specific Employees or Groups.

By selecting Display Client Security from the Actions dropdown menu, the current Client Security settings will be displayed. To add a security setting, select Add Employee or Add Group and select the security access to be assigned.



This setting will only restrict access based on the security group that the employee or group already belong to.

Example:

Employee A is a member of Security Group 1 which has Edit Client Records. Client Security can be configured to restrict access to this Client.

Employee B is a member of Security Group 2 which does not have Edit Client Records. Client Security can be configured, but cannot grant access to the Client as Client Security cannot override Security Group Permissions.