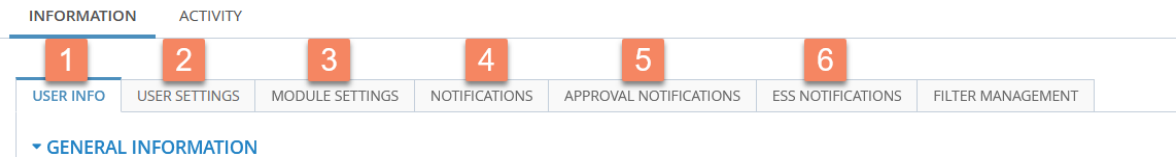


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My Account

All user-specific settings and general information are found in the My Account area.



1. User Info

- Main user information is kept and updated on the User Info tab. Use this tab to update your Name, Email, Title/Department, phone numbers, Avatar, and Security Settings including Two-Factor Authentication and changing your password.

INFORMATION ACTIVITY

▼ GENERAL INFORMATION

User Name	CCANFIELD	Title	IMPLEMENTATION AND TRAINING SPECIALIST
Name	CHRISTAL CANFIELD	Department	IMPLEMENTATION AND TRAINING SERVICES
Email Address	CCANFIELD@BSASOFTWARE.COM	Office	

▼ PHONE NUMBERS

Work Phone	(855) 272-7638	Other Phone	(517) 641-8900
Work Phone Ext		Mobile Phone	(123) 456-7890
Home Phone			

▼ PROFILE IMAGE

Avatar Type	Default
User Avatar	Default Gravatar Image

▼ SECURITY

Use Two-Factor Authentication Every Login

CHANGE PASSWORD VIEW LOGIN ATTEMPTS

SAVE AND CLOSE CLOSE

2. User Settings

- To update which page you land on at login, connect your printer, adjust some font settings, and determine whether the system will include a decimal when you're entering numbers, click on the User Settings tab.

▼ SITE PREFERENCES

Startup Page	Active Dashboard
Auto Print Action	Show Report in the Browser
Printer	NOT SPECIFIED
Folder Location	NOT SPECIFIED
Default Letter Printer	NOT SPECIFIED

▼ AUTOMATIC PRINTING / SAVING

RE-VALIDATE PRINTER

▼ SITE DISPLAY

Use Large Font on Grids

Display Database Name in Header

With this option ON, it will display the database name in the header bar at the top of the page.

▼ DATA ENTRY

Numbers - Use Implied Decimal Place

List View - Always display sorted columns first when determining column order

Play alert on invalid General Ledger # entry

▼ VIEW PREFERENCES

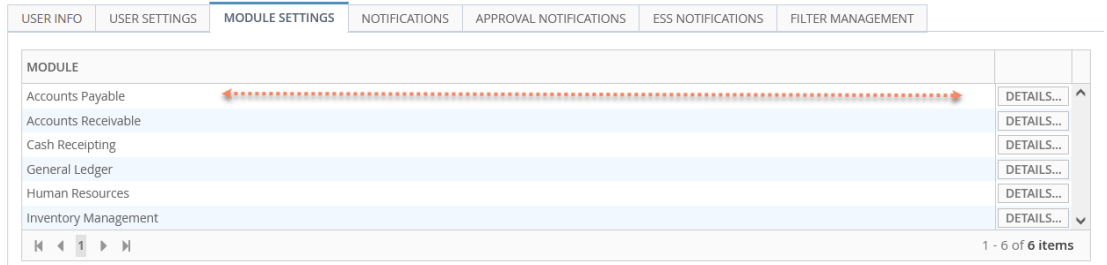
Theme	Dark
View Density	Standard Density

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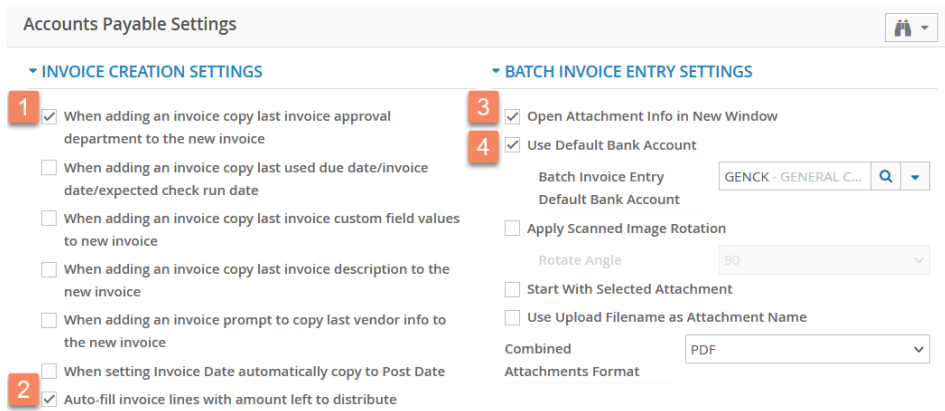
3. Module Settings

- a. The Module Settings tab is the home for the individual settings of the modules you have access to. Click on the “Details” button for the module you’d like to update.



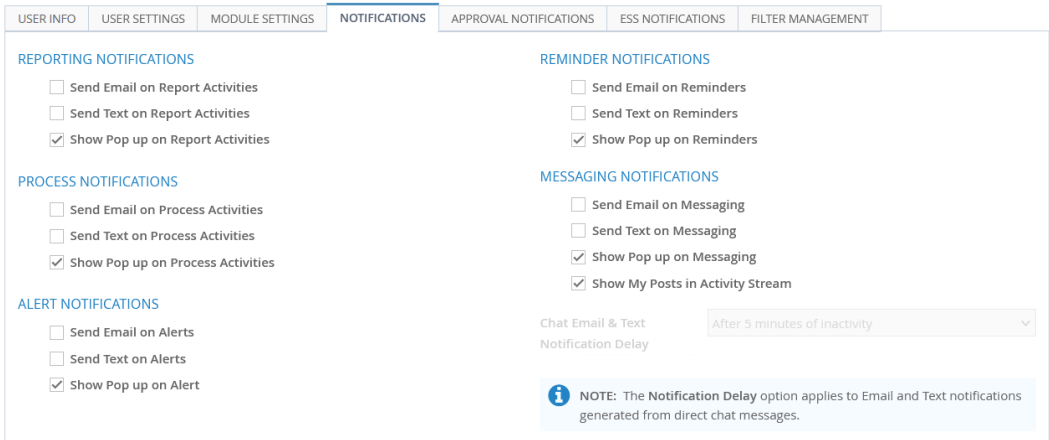
- b. Some common settings include:

i. Accounts Payable



4. Notifications

- a. The Notification tab is where you take control of how you receive messages from the Cloud. By default, pop-up notifications are activated. You can elect to have an email or text message sent when you have updates on your activities or a message is sent to you within the messaging utility.



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5. Approval Notifications

- Approvers can update your settings on the Approval Notifications tab. Like the Notifications tab for activities and messaging, you can elect an email or text message for items needing your attention.
- This also applies to items you sent to be approved, so you are notified by your preferred method when your item moves the next step.
- To mark yourself out of office and send approvals to your Backup, select the Out of Office box and enter the applicable dates.

APPROVAL EMAIL SETTINGS

Email Frequency: Send Emails As Soon As They Are Ready

Daily Email Time: [Empty field]

RECORDS REQUIRING MY APPROVAL

Send Email Send Text Show Pop up

RECORDS MY USER CREATED

APPROVAL LEVEL CHANGE FOR RECORDS MY USER CREATED

Send Email Send Text Show Notification Show Pop up

RECORD FULLY APPROVED FOR RECORDS MY USER CREATED

Send Email Send Text Show Notification Show Pop up

APPROVAL FORWARDING

When setting your user as Out of Office your approvals will be forwarded any designated backup approvers who will then be elevated to primary approvers.

Out of Office

Use Out of Office Start/End Dates

Start Date/Time: 08/17/2022 09:33 AM

End Date/Time: 08/23/2022 09:33 AM

RECORDS MY USER REQUESTED

APPROVAL LEVEL CHANGED FOR RECORDS MY USER REQUESTED

Send Email Send Text Show Notification Show Pop up

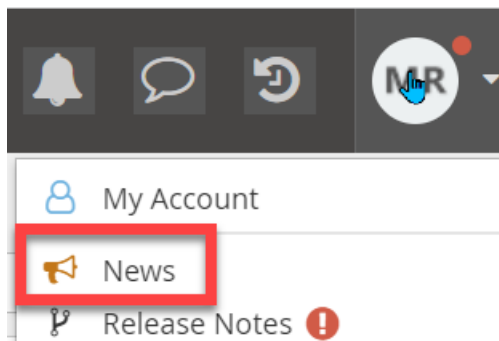
RECORD FULLY APPROVED FOR RECORDS MY USER REQUESTED

Send Email Send Text Show Notification Show Pop up

SAVE AND CLOSE CLOSE

News

BS&A shares information with customers in the News Section of your Avatar Menu.



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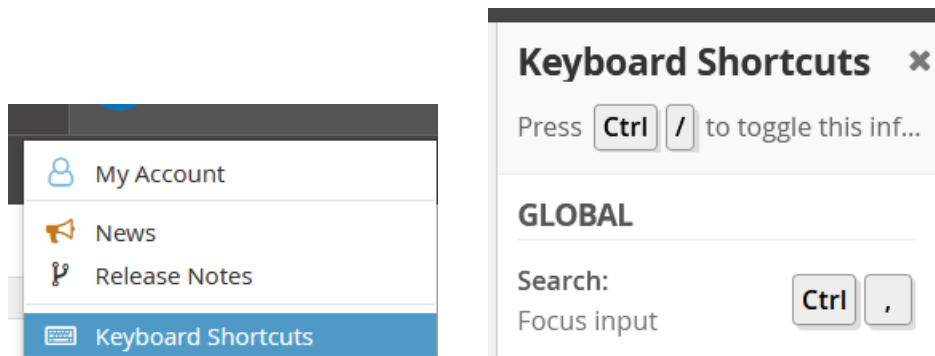
Release Notes

BS&A automatically updates on the 1st and 15th of every month. Release Notes can be reviewed to see what has been changed or added to the system.



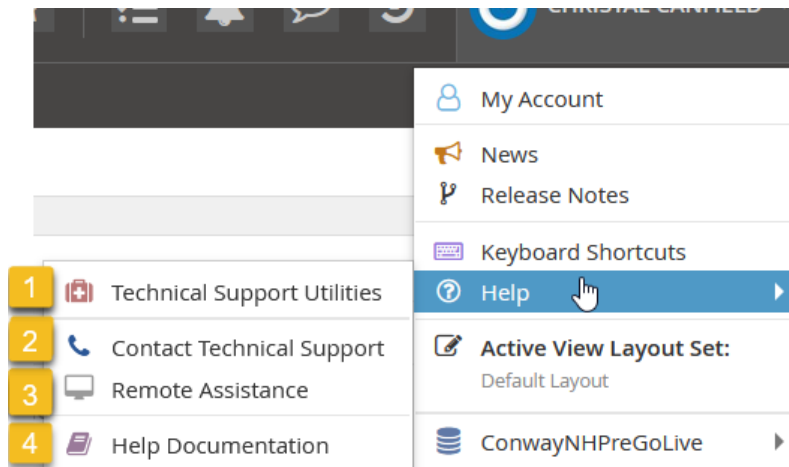
Keyboard Shortcuts

Keyboard shortcuts can be referenced for ease of navigation.



Help Functions

To make sure you can have support resources, you can use the following to connect with BS&A or self-service assistance.



1. Technical Support Utilities (TSUs)
 - a. TSUs are used by a member of BS&A Support to solve a variety of scenarios a customer will come across.

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2. Contact Technical Support

- a. When you need a member of BS&A Support to reach out to you to resolve an issue, complete the BS&A Technical Support Request form with as much information as possible, include attachments with documents or screenshots if possible. Required fields are in yellow.

If you would like a call instead of email support, be sure to check the "Request Call Back" box. Click Submit when complete.

The screenshot shows the 'BS&A Technical Support Request' form. It includes fields for Full Name (1), Email (2), Phone (3), and Phone Ext. There is a checkbox for 'Request Call Back' with a red arrow pointing to it. A section titled 'HOW CAN WE HELP?' contains a 'Module' dropdown (4) set to 'Accounts Payable', and several checkboxes: 'Vendor Setup' (5), 'Check Request Process', 'Voiding Checks/Invoices' (checked), 'Check Maintenance Utilities', and 'Approval Setup/Email Notifications'. The 'Problem Description' (6) field contains the text 'I need to void checks, but don't want to mess anything up.'. At the bottom, there is an 'ATTACHMENTS' section (7) and 'SUBMIT' and 'CANCEL' buttons (8).

3. Remote Assistance

- a. BS&A can share your screen when assisting remotely using Bomgar. The BS&A representative will ask you to click on the Remote Assistance option and will provide you will a code to enter in the Session Key field.

Please enter the Session Key provided by your BS&A Software Support Representative below and click Submit.

Session Key

4. Help Documentation

- a. For self-service solutions, refer to Help Documentation for quick reference to actions you are wanting to take within the Views, Tasks, or Settings you have access to in any of your modules.

