UNIFOCUS
WORKFORCE MANAGEMENT

Release Document

Module 1: Currency Setup
Module 2: Group Manager
Module 3: Message Format

February 13, 2024

972.512.5000 | www.unifocus.com | info@unifocus.com

Contents

UNIFOCUS

CURRENCY SETUP

INTRODUCTION

This release introduces the Currency Setup module, a tool for configuring currency names and symbols for monetary amounts used throughout the application. This document outlines the release details and provides comprehensive information on its functionalities.

This document is intended for your team members, including administrators, IT personnel, and property users who will be interacting with the Currency Setup module.

GETTING STARTED

Accessing the module

To access the Currency Setup module:

1. Visit the system configuration screens.
2. Go to the system configuration module section.
3. Under the **Core Management** section, click **Currency Setup**.

User roles and permissions

To access the Currency Setup module, users must have:

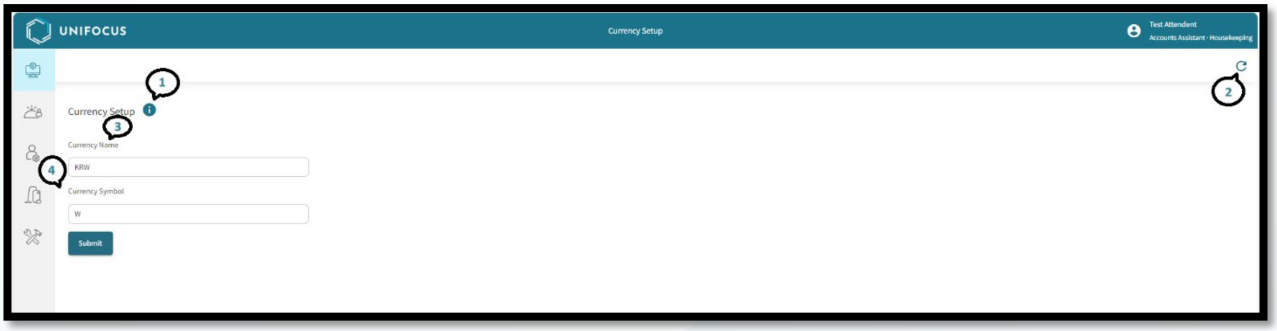
Valid user IDs and passwords for the Service application.

Minimum rights to access and modify as specified below:

Role Name: Currency Setup

- System configuration >> System Information: View only
- System configuration >> System Information (Add): Add and edit
- System configuration >> System Information (Delete): Delete only
- System configuration >> System Information (Edit): Add and edit only

MAIN SCREEN OVERVIEW



New Currency Setup screen

1. **Information tooltip**: Hovering over the **i** icon provides information about currency setup.
2. **Refresh icon**: Click to refresh the data and display the updated information on the screen.
3. **Currency Name**: Add currency name in this field.
4. **Currency Symbol**: Provide the currency symbol to be used throughout the application.

Note: The Multi Property option is available if the user has access to more than one property. This option allows users to manage currency setup across multiple properties.

GROUP MANAGER

INTRODUCTION

This release also introduces the Group Manager module, a comprehensive tool for managing groups by assigning multiple staff members. This document outlines the release details and provides comprehensive information on its functionalities.

This document is intended for your team members, including administrators, IT personnel, and staff members who will be interacting with the Group Manager Module.

GETTING STARTED

Accessing the module

To access the Group Manager module:

1. Visit the system configuration screens.
2. Go to the Service module section.
3. Click the **Group Manager** module.

User roles and permissions

To access the Group Manager Module, users must have:

Valid user IDs and passwords for the Service application.

Minimum rights to access and modify as specified below:

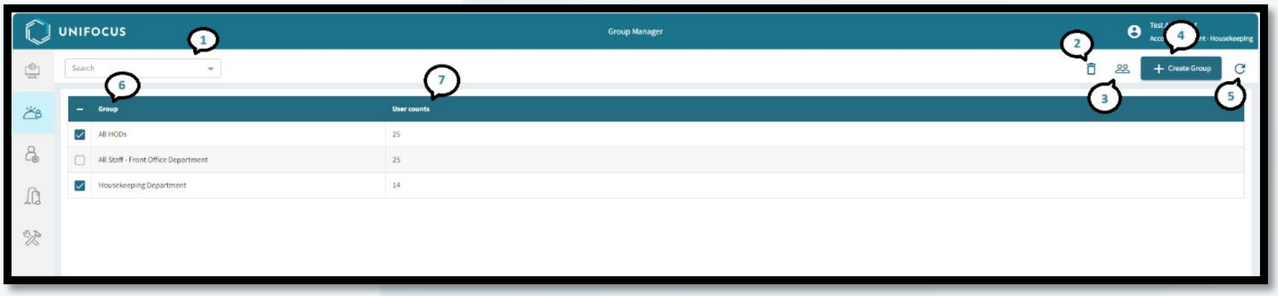
Role Name: Group Manager

- Group Messaging: View only
- Group Messaging (Add): Add only
- Group Messaging (Delete): Delete only
- Group Messaging (Edit): Edit only

Integration with Translation Manager

Users can translate group names into the licensed language with the help of the Translation Manager Module available in the settings of system configuration.

MAIN SCREEN OVERVIEW



New Group Manager screen

1. **Search field**: Use this field to search for specific group names.
2. **Multi Delete button**: Appears when you select groups using the checkboxes. Allows deletion of multiple groups with one click.
3. **Assign button**: Appears when you select groups using the checkboxes. Allows assignment of multiple users to all selected groups with one click.
4. **Create Group button**: Click to go to the Add User Group screen for creating a new group.
5. **Refresh icon**: Click to refresh the data and display the updated information on the screen.
6. **Group name**: Displays currently saved groups. Allows editing and deletion using hover icons on each row.
7. **User count**: Displays the total number of users assigned to each group.

Note: The Multi Property option is available if the user has access to more than one property. This option allows users to manage groups across multiple properties.

UNIFOCUS

MESSAGE FORMAT

INTRODUCTION

This release also introduces the Message Format module, an essential tool for customizing message formats used in the alerts sent to different device types via the Service application. This document outlines the release details and provides comprehensive information on its functionalities.

This release document covers the scope and features of the Message Format module. It is designed for administrators, IT personnel, and end-users who will be customizing message formats within the application.

GETTING STARTED

Accessing the module

To access the Message Format module, follow these steps:

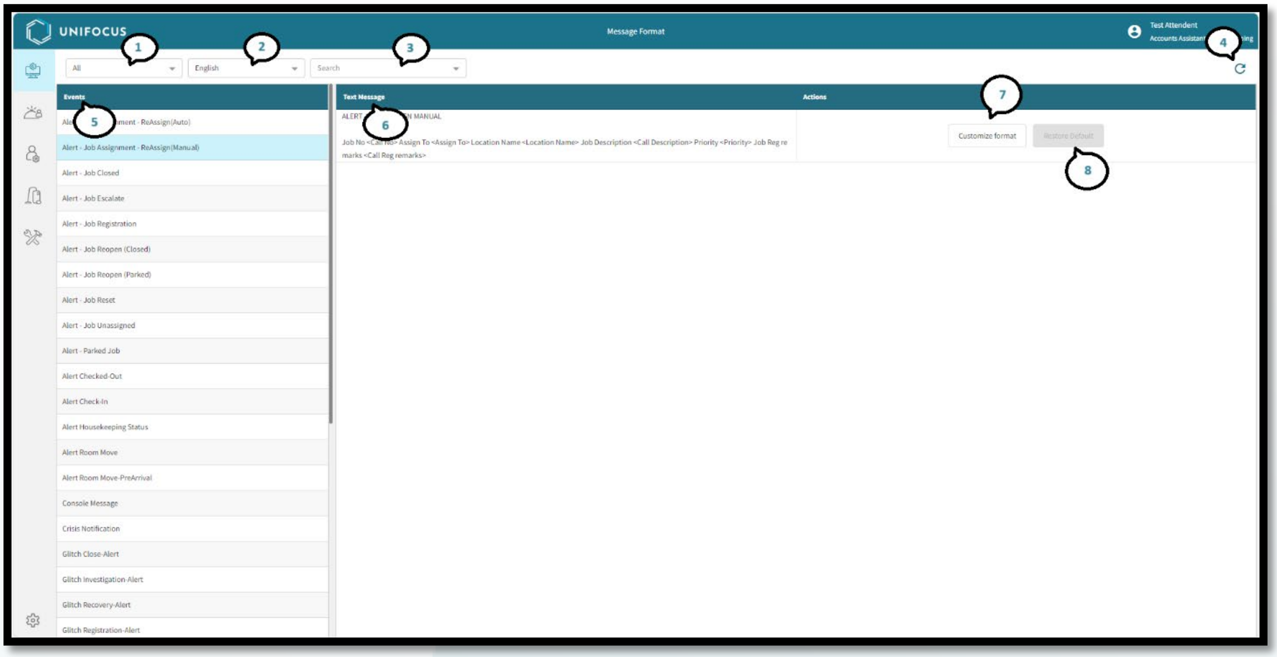
1. Visit the system configuration screens.
2. Go to the Service module section.
3. Click the **Message Format** module.

User roles and permissions

To access the Group Manager module, users must have:

- Valid user IDs and passwords for the Service application.
- Minimum rights to access and modify as specified below:
  - Role Name: Message Format
  - System configuration >> Message Format: To view and customize message format.

MAIN SCREEN OVERVIEW



New Message Format screen

1. **Module Selection drop-down**: Filter events based on modules by selecting a preferred module from the drop-down list. Default selection is "All".
2. **Language Selection drop-down**: Select the language from the drop-down list to view message formats in the selected language. Default language is English.
3. **Search field**: Use this field to search for specific events.
4. **Refresh icon**: Click to refresh the data and display the updated information on the screen.
5. **Event Name**: Displays the list of events.
6. **Text Message**: Displays the current text message format of the selected event.
7. **Customize Format button**: Click to customize the text message format for the selected event.
8. **Restore Default button:** Click to restore the default format. This button is unavailable if no customization is done on the text message.

Note: The Multi Property option is available if the user has access to more than one property. This option allows users to manage message formats across multiple properties.

HELP US IMPROVE

We value your input and want to hear from you! As we continue to enhance Unifocus products, we invite you to share your questions, suggestions, and feedback with us. If you have any thoughts or ideas on how we can improve our products, please don't hesitate to reach out to us at product@unifocus.com or Ideas Portal (aha.io).