

Saturday, August 24, 2024 at 21:32:31 Pacific Daylight Time

Subject: Re: New User Tenar Hall
Date: Thursday, February 23, 2023 at 12:32:36 PM Pacific Standard Time
From: Joseph Cohen
To: Dan Burke

Thanks Dan...pretty clear where things are in the process...ball is in Tenar's court to connect with Caselle.

Joseph Cohen
josephcohen77@gmail.com
619.818.1496

On Feb 23, 2023, at 12:18 PM, Dan Burke <dan@eastsoundwater.org> wrote:

From: Freya Hall <orcas.freya@gmail.com>
Date: Friday, February 17, 2023 at 2:33 PM
To: Connie Averett <cma@caselle.com>
Cc: Dan Burke <dan@eastsoundwater.org>, Clyde Duke <kookaburra51@hotmail.com>, James Nelson <bayside25@gmail.com>
Subject: Re: New User Tenar Hall

Will do. Thank you.
-Tenar

On Fri, Feb 17, 2023 at 2:31 PM Connie Averett <cma@caselle.com> wrote:

Tenar,
Dave H is out this afternoon but he is happy to help you get set up as soon as you are back in town after February 25th. Send me a message then and I will have him contact you to get you set up.

Kind regards,

Connie Averett
Project Manager
Implementation

Caselle, Inc.

1656 S East Bay Blvd, Ste 100, Provo UT 84606
[800.243.8275](tel:800.243.8275) | Direct [801.850.5079](tel:801.850.5079) | Fax [801.850.5001](tel:801.850.5001)
cma@caselle.com

From: Freya Hall
Sent: Friday, February 17, 2023 12:36 PM
To: Dan Burke <dan@eastsoundwater.org>
Cc: Connie Averett <cma@caselle.com>; Clyde Duke <kookaburra51@hotmail.com>; James Nelson <bayside25@gmail.com>
Subject: Re: New User Tenar Hall

Hello all,
Thank you so much for all of your work on this! Tenar Hall is fine. I can be reached at (415) 706-7176.
I am going to be out of town and unavailable from Feb. 18th - Feb 25th. I will reach out once I am back if we do not manage to connect today.
Thank you again,
-Tnear

On Fri, Feb 17, 2023 at 10:27 AM Dan Burke <dan@eastsoundwater.org> wrote:

Thank you, Connie. I will differ to her on that question.

Dan Burke
General Manager
(360) 622-3343

From: Connie Averett <cma@caselle.com>
Date: Friday, February 17, 2023 at 9:45 AM
To: Dan Burke <dan@eastsoundwater.org>, Clyde Duke <kookaburra51@hotmail.com>, James Nelson <bayside25@gmail.com>, Freya Hall <orcas.freya@gmail.com>
Subject: RE: New User Tenar Hall

Okay we set her up as Tenar Hall. Is that the correct name or should it be Freya Hall?

Connie Averett
Project Manager
Implementation

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cma@caselle.com

From: Dan Burke
Sent: Friday, February 17, 2023 10:42 AM
To: Connie Averett <cma@caselle.com>; Clyde Duke <kookaburra51@hotmail.com>; James Nelson <bayside25@gmail.com>; Freya Hall <orcas.freya@gmail.com>
Subject: Re: New User Tenar Hall

Great!

I have completed the work on my end so please get ahold of her asap. I only have her email here but she is very responsive:

Freya Hall: orcas.freya@gmail.com

Can you reach out to her today please?

Dan Burke
General Manager
(360) 622-3343

From: Connie Averett <cma@caselle.com>
Date: Friday, February 17, 2023 at 9:40 AM
To: Dan Burke <dan@eastsoundwater.org>, Clyde Duke <kookaburra51@hotmail.com>, James Nelson <bayside25@gmail.com>
Subject: RE: New User Tenar Hall

Dan,
Thank you for your time this morning to discuss the access below. One thing I forgot to mention is the security has been created so we can work with Tenar to get her set up and online for viewing. Please let me know when you have her access rights set so I can have Dave H contact her. Also, is there a number for her that we can call as well as an email address?

Connie Averett
Project Manager
Implementation

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[800.243.8275](tel:800.243.8275) | Direct [801.850.5079](tel:801.850.5079) | Fax [801.850.5001](tel:801.850.5001)
cma@caselle.com

From: Dan Burke
Sent: Thursday, February 16, 2023 5:05 PM
To: Connie Averett <cma@caselle.com>; Clyde Duke <kookaburra51@hotmail.com>; James Nelson <bayside25@gmail.com>
Subject: Re: New User Tenar Hall

Thank you! I got it (see below). Do I uncheck the other squares for Invoices and Payments, Purchases and Requisitions, Vendors and Organization?

<image001.png>

Thank you!

Dan Burke
General Manager
(360) 622-3343

From: Connie Averett <cma@caselle.com>
Date: Thursday, February 16, 2023 at 3:42 PM
To: Dan Burke <dan@eastsoundwater.org>, Clyde Duke <kookaburra51@hotmail.com>, James Nelson <bayside25@gmail.com>
Subject: RE: New User Tenar Hall

The view only access has to be done by you.

Go to System Management/Security/Setup/Modify User Rights

Then select the user that you have set up and want to change the permissions on

For view only there is an inquiry option that you will need to select for each application.

For example: In Accounts Payable there is PO Inquiry, Requisition Inquiry, and Vendor Inquiry. All of those will need to be selected if you want her to have "view only" access.

Connie Averett

Project Manager
Implementation

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cma@caselle.com

From: Dan Burke
Sent: Thursday, February 16, 2023 4:32 PM
To: Connie Averett <cma@caselle.com>; Clyde Duke <kookaburra51@hotmail.com>; James Nelson <bayside25@gmail.com>
Subject: Re: New User Tenar Hall

OK, I have given her access to the following modules:

- General Ledger
- Accounts Payable
- Accounts Receivable
- Cash Receipting
- Project Accounting

These will be waiting for her when you log her in.

Can you confirm that she will have view-only access please?

Thank you!

Dan Burke
General Manager
(360) 622-3343

From: Connie Averett <cma@caselle.com>
Date: Thursday, February 16, 2023 at 3:16 PM
To: Dan Burke <dan@eastsoundwater.org>, Clyde Duke <kookaburra51@hotmail.com>, James Nelson <bayside25@gmail.com>
Subject: RE: New User Tenar Hall

Security is created when you purchase additional licensing. Once I know that has been done and updated, I can have Dave H contact her to make sure she is all set up and can log in. You can get her added into System Management anytime and give her only the access you want her to have now.

Connie Averett
Project Manager
Implementation
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cma@caselle.com

From: Dan Burke
Sent: Thursday, February 16, 2023 4:03 PM
To: Connie Averett <cma@caselle.com>; Clyde Duke <kookaburra51@hotmail.com>; James Nelson <bayside25@gmail.com>
Subject: Re: New User Tenar Hall

Connie, thank you.

Can you explain a little more about the security part please? I'm not sure I am following.

Dan Burke
General Manager
(360) 622-3343

From: Connie Averett <cma@caselle.com>
Date: Thursday, February 16, 2023 at 2:58 PM
To: Dan Burke <dan@eastsoundwater.org>, Clyde Duke

<kookaburra51@hotmail.com>, James Nelson
<bayside25@gmail.com>
Subject: RE: New User Tenar Hall

Dan,

You will need to do the set up in System Management and only give her the read-only access rites. The only thing I have set up is the hosted log in. The rest has to be done on your side in the Caselle data once the security is in place. I have requested that the security is completed as soon as possible. Once that is done I can have Dave H contact her to help her get setup.

Connie Averett

Project Manager
Implementation

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cma@caselle.com

From: Dan Burke
Sent: Thursday, February 16, 2023 2:53 PM
To: Connie Averett <cma@caselle.com>; Clyde Duke <kookaburra51@hotmail.com>; James Nelson <bayside25@gmail.com>
Subject: Re: New User Tenar Hall

This is great! Thank you.

Can you do two things ASAP please:

1. Confirm this user has read-only access? Our Board voted to allow this user to have read-only access and it is my job to deliver on the motion as presented to me.
2. Set up a training session soon where someone can get Tenar successfully connected to the remote server and access Caselle successfully?

Dan Burke
General Manager
(360) 622-3343

From: Connie Averett <cma@caselle.com>
Date: Thursday, February 16, 2023 at 9:58 AM
To: Dan Burke <dan@eastsoundwater.org>
Subject: RE: New User Tenar Hall

Dan,
Here is the requested information for Tenar Hall.

Tenar.Hall@casellecloud.com

EUfh82TPgn

Let me know if you have issues getting her set up and logged in.

Happy Thursday!

Connie Averett

Project Manager

Implementation

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cma@caselle.com

From: Connie Averett

Sent: Thursday, February 16, 2023 10:28 AM

To: Dan Burke <dan@eastsoundwater.org>; Clyde Duke <kookaburra51@hotmail.com>; Wade Walker <pww@caselle.com>

Cc: James Nelson <bayside25@gmail.com>

Subject: RE: New User Tenar Hall

I will work on it today and will get you the information as soon as I have it.

Connie Averett

Project Manager

Implementation

Caselle, Inc.

1656 S East Bay Blvd, Ste 100, Provo UT 84606

800.243.8275 | Direct [801.850.5079](tel:801.850.5079) | Fax [801.850.5001](tel:801.850.5001)

cma@caselle.com

From: Dan Burke

Sent: Wednesday, February 15, 2023 4:51 PM

To: Clyde Duke <kookaburra51@hotmail.com>; Wade Walker <pww@caselle.com>; Connie Averett <cma@caselle.com>

Cc: James Nelson <bayside25@gmail.com>

Subject: Re: New User Tenar Hall

Hi all,

We are curious how long it will take to get this new user into the system with view-only access?

Thank you for your time.

Dan Burke

General Manager

(360) 622-3343

From: Dan Burke <dan@eastsoundwater.org>
Date: Wednesday, February 15, 2023 at 9:59 AM
To: Clyde Duke <kookaburra51@hotmail.com>, Wade Walker <pww@caselle.com>
Cc: James Nelson <bayside25@gmail.com>
Subject: Re: New User Tenar Hall

How about, "Let's make this happen!"



Go man, go!

Dan Burke
General Manager
(360) 622-3343

From: Clyde Duke <kookaburra51@hotmail.com>
Date: Wednesday, February 15, 2023 at 9:57 AM
To: Wade Walker <pww@caselle.com>
Cc: Dan Burke <dan@eastsoundwater.org>, James Nelson <bayside25@gmail.com>
Subject: Re: New User Tenar Hall

Thanks all. We will adjust our cost's accordingly.
Clyde Duke, President EWUA

Sent from my iPhone

On Feb 15, 2023, at 9:26 AM, Wade Walker <pww@caselle.com> wrote:

Hi Dan,

The cost for an additional user license is \$75 a month. There is no upfront cost. I will go ahead and inform implementation as soon as you reply with "let's go for it!" or "Do it now!" or whatever you want to come up with 😊.

Thanks,

Wade Walker
Territory Manager
CASELLE Commitment to Community
Direct [801.850.5085](tel:801.850.5085)

Email pww@caselle.com

See what our customers are saying:
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From: Dan Burke <dan@eastsoundwater.org>
Sent: Tuesday, February 14, 2023 5:39 PM
To: Wade Walker <pww@caselle.com>
Cc: Clyde Duke <kookaburra51@hotmail.com>; James Nelson <bayside25@gmail.com>
Subject: New User Tenar Hall

Hi Wade!

I would like to add a new user with read-only access. Can you please quote us on the user addition and kick this off with the implementation ASAP?

Tenar is our Board Treasurer and we want her to see the system as I do.

Dan Burke
General Manager
(360) 622-3343