

Billing Register runs in a multi-user environment thus there is always a need to set up user permissions for different users according to their job roles and organizational hierarchy.

In any business software, usually the actions which can be performed by an Employee are like View Data, Edit Data, Add Record, Delete Record, Print Report, and Send A Message. In Billing Register, these actions can be controlled by assigning/revoking respective Permissions.

There is something called a 'User Role' which is composed of a set of permissions using which permissions can be assigned quickly to an Employee. These Role Permissions can be further tweaked to cater any specific needs. Some User Roles are provided by default, and are named as Super User Access, Sales Only, Purchase Only, Marketing Only, Stationery Printing Only, and Inventory Control.

While creating an employee, a User Role is required to be assigned. So, first we configure User Roles and then assign the User Roles to respective users (employees).

It is recommended that the business owner remains the only 'Admin' and all the other employees remain underneath him/her with appropriate User Role assigned to each employee. The Admin has the 'Super User Access' Role by default.

First, we will see how to configure User Roles and Role Permissions, and then we'll have a look at how to assign a User Role to a user in Billing Register.





Billing Register

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🖃 Dashboard 🗙 📑 Role Permissions 🗙

ROLE PERMISSIONS

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Billing Register

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🖃 Dashboard 🗙 📑 Role Permissions 🗙

ROLE PERMISSIONS

	Role	Permissions :					sible To Admin O	nly	Select All Deselect All Load All Features			es
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ROLE PERMISSIONS

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~	Role
	Super User Access
+	Sales Only
Eg.	Purchase Only
ŵ	Marketing Only
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You can use the built-in Roles or add your own Role and choose the required features à la carte.

Let's create a new User Role called 'Sales Rep' which has all the features of the User Role 'Sales Only' but includes Leads and Opportunities too.

We'll just create a copy of 'Sales Only' and add the extra features therein.

Purchases Suppliers Inventory Production Label/Stickers Accounting

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Super User Access

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ROLE PERMISSIONS

~	Role
	Super User Access
+	Sales Only
Ea	Purchase Only
à	Marketing Only
	Stationery Printing Only
ß	Inventory Control

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ROLE PERMISSIONS

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	Super User Access
+	Sales Only
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	Sales Rep
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-0	Role
	Super User Access
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ROLE PERMISSIONS

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Customers

-0	Role
	Super User Access
+	Sales Only
Eg.	Purchase Only
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	Permissions :				Features Acces	sible To Admin C	Only S	Select All Des	elect All	Load All Featur	res
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This error came up when we tried to include the 'Allow Print' permission. It simply means that the Permission is not a valid one for this feature. In this case, there is no such thing as printing a Lead. Hence the error.

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Billing Register

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😑 Dashboard 🗙 📑 Role Permissions 🗙

ROLE PERMISSIONS

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-0	Role
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Permissions :				Features Acces	sible To Admin C	Dnly	Select All De	select All	Load All Featu	res
Feature		>Allow Add	>Allow Edit	>Allow Delete	>Allow View	>Allow Print	>Allow Messages	Sj	pecial Permissions	
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ROLE PERMISSIONS

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-0	Role
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F	Permissions :					Features Acces	sible To Admin (Dnly	Select All	Deselect All	Load All Featu	ires
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EMPLOYEES

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2	Kristen Reid		Employee Role : Sale	s Only		~						
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			Channel Sales Partners		~		ass	signed the	Role:			
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	Emp No. 1 2 Record: I4 4 Search (Emp No. Employee Name 1 David Morgan 2 Kristen Reid	Emp No. Employee Name 1 David Morgan 2 Kristen Reid 8 8 8 8 8 8 9 8 9 1 <t< th=""><th>Employee Name 1 David Morgan 2 Kristen Reid Employee Role : Saler Customers Non Returning Custome Point Of Service Manage Receipts/Refunds Sale Performance - By 0 Sale Performance - By 0 Sale Performance - By 0 Sale Performance - By 0 Sale Performance - By 0 Sale Performance - By 0 Sale Performance - By 0 Sale Performance - By 0 Sale Performance - By 0 Sale Performance - By 0 Sale Performance - By 0 Sale Performance - By 0 Sale Performance - By 0 Sale Performance - By 0 Sales Sales Sales - Touch Interface * Sales - Touch Interface * Search All 0 Start Text End Text Record: H 4 2 of 2 + H > No Filter Search</th><th>Employee Name Basic Details Communications 1 David Morgan Employee Role: Sales Only 2 Kristen Reid Feature Channel Sales Partners Customers Non Returning Customers Report Point Of Service Management Receipts/Refunds Sale Orders Sale Orders Sale Performance - By Customer Sale Performance - By Receipt Sale Sales Sale Performance - By WWT Items Sales Sales Sales Sales Sales Sale Sales</th><th>Emp No. Employee Name 1 David Morgan 2 Kristen Reid Employee Role: Sales Only Feature Customers Customers Non Returning Customers Report Point Of Service Management Receipts/Refunds Sale Orders Sale Performance - By Customer Sale Performance - By Receipt Sale Performance - By WWT Items Sales Sales - Touch Interface * Record: M 12 of 2 Mail Start Text Example End Text</th><th>Employee Name 1 David Morgan 2 Kristen Reid Employee Role: Sales Only Feature Oklight Customers Imployee Role: Non Returning Customers Report Imployee Role: Point Of Service Management Imployee Role: Sale Performance - By Receipt Imployee Role: Sales Imployee Role: Sales Imployee Role: Sale Performance - By Receipt Imployee Role: Sales Imployee Role: Sales Imployee Role: Sale Performance - By Receipt Imployee Role: Sales Imployee Role: Sales Imployee Role:</th><th>Employee Name 1 David Morgan 2 Kristen Reid Feature Value Customers V Customers V Customers V Receipts/Refunds V Sale Performance - By Customer V Sale Performance - By WWT Items V Sale Performance - By Receipt V Sale Performance - By WWT Items V Sale Performance - By Receipt V Sale Performance - By Receipt V Sale Performance - By WWT Items V Sale Performance - By Receipt V Sale Performance</th><th>Emp No. Employee Name 1 David Morgan 2 Kristen Reid Imployee Role: Sales Only Customers V Classes V Point Of Service Management V Receipts/Refunds V Sale Orders V Sale Orders V Sale Orders V Point Of Service Management V Sale Orders V Sale Performance - By Customer V Sale Performance - By Receipt V Sale Performance - By WUT Items V Sale Performance - By WUT Items V Sales V Sales</th><th>Emp No. Employee Name 1 David Morgan 2 Kristen Reid Engloyee Role: Sales Only. 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EMPLOYEES

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EMPLOYEES

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-	1	David Morgan Kristen Reid	Employee Role : Sale	s Rep		V						
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Sales Customers

EMPLOYEES

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'Sales Rep' role is now applied for Kristen.

This is how we can manage the permissions for users/employees in Billing Register.