



HOW TO SET UP USER PERMISSIONS IN BILLING REGISTER?

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.

Search forms here

Sales

Customers

Purchases

Suppliers

Inventory

Production

Labels/Stickers

Accounting

Marketing

Administrative Tasks

Statutory Master Data

General Settings

General Master Data

Organization

Click on the Administrative Tasks menu button

Holidays :

Holiday Name	Date	Refresh
Click on the Administrative Tasks menu button		

Check Invalid Records

Events/Reminders

Statutory Reports

Search forms here

Sales

Customers

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Production

Labels/Stickers

Accounting

Marketing

Administrative Tasks

Invalid Records

Day Close

Backup Database

Run SQL Query/Function

Employee Login Information

Forms Event Locking

Online File Storage Drives

Role Permissions

Delete Data

Statutory M

General

General Master Data

Organization

Click on the Role Permissions button

Holidays :

Holiday Name	Date
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Refresh

Check Invalid Records

Events/Reminders

Statutory Reports

Role

Super User Access

Sales Only

Purchase Only

Marketing Only

Stationery Printing Only

Inventory Control

These are the User Roles provided by default.

Permissions :

Features Accessible To Admin Only

Select All

Deselect All

Load All Features

Feature	>Allow Add	>Allow Edit	>Allow Delete	>Allow View	>Allow Print	>Allow Messages	Special Permissions
Accounting Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Additional Charges	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Address Label Format	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
All FY Vouchers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Attributes Master	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Balance Sheet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Bulk Marketing Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Business Sections	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Channel Sales Partners	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Currency Denomination	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Day Close	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Default Accounting Groups	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Delete Data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Ecommerce Operators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Email Servers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Employee Master	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Employees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Exchange Rate Providers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
General Master	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Import Contacts From Excel/CSV Files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Import Unformatted Text Files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Invalid Vouchers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Items Category	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Items Label/Sticker Format	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Items Sale/Service Tasks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions

Record: 1 of 6

No Filter

Search

Search

All

Start Text

End Text

Record:

No Filter

Search

ROLE PERMISSIONS

Role

Super User Access

Sales Only

Purchase Only

Marketing Only

Stationery Printing Only

Inventory Control

This is the Super User Access role (Admin). It cannot be deleted.

Record: 1 of 6

No Filter

Search

Search

All

Start Text

End Text

Permissions :

Features Accessible To Admin Only

Select All

Deselect All

Load All Features

Feature	>Allow Add	>Allow Edit	>Allow Delete	>Allow View	>Allow Print	>Allow Messages	Special Permissions
Accounting Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Additional Charge	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Address Label Fo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
All FY Vouchers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Attributes Master	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Balance Sheet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Bulk Marketing Gr	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Business Sections	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Channel Sales Partners	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Currency Denomination	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Day Close	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Default Accounting Groups	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Delete Data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Ecommerce Operators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Email Servers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Employee Master	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Employees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Exchange Rate Providers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
General Master	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Import Contacts From Excel/CSV Files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Import Unformatted Text Files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Invalid Vouchers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Items Category	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Items Label/Sticker Format	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Items Sale/Service Tasks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions

Record: 14

No Filter

Search

If a checkbox appears checked, this permission is allowed for the feature in this role.

ROLE PERMISSIONS

Role
Super User Access
Sales Only
Purchase Only
Marketing Only
Stationery Printing Only
Inventory Control

Permissions :		Features Accessible To Admin Only						Select All	Deselect All	Load All Features
Feature		>Allow Add	>Allow Edit	>Allow Delete	>Allow View	>Allow Print	>Allow Messages	Special Permissions		
Channel Sales Partners		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
Customers		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
Non Returning Customers Report		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
Point Of Service Management		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
Receipts/Refunds		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions	
Sale Orders		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions	
Sale Performance - By Customer		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
Sale Performance - By Items		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
Sale Performance - By Receipt		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
Sale Performance - By WWT Items		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
Sale Performance - General		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
Sales		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions	
Sales - Touch Interface		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions	
*		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions	

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.

ROLE PERMISSIONS

Role

Super User Access

Sales Only

Purchase Only

Mark

Sta

Inve

Click here to copy 'Sales Only'. Please notice, we already have 'Sales Only' selected.

Record: 2 of 6

No Filter

Search

Search

All

Start Text

End Text

Permissions :

Features Accessible To Admin Only

Select All

Deselect All

Load All Features

Feature	>Allow Add	>Allow Edit	>Allow Delete	>Allow View	>Allow Print	>Allow Messages	Special Permissions	
Channel Sales Partners	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Non Returning Customers Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Point Of Service Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Receipts/Refunds	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Sale Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Sale Performance - By Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By Receipt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By WWT Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - General	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Sales - Touch Interface	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions

Record: 7 of 13

No Filter

Search

ROLE PERMISSIONS

- Role
- Super User Access
- Sales Only
- Purchase Only
- Marketing Only
- Stationery Printing Only
- Inventory Control

Permissions :

Features Accessible To Admin Only

Select All

Deselect All

Load All Features

Feature	>Allow Add	>Allow Edit	>Allow Delete	>Allow View	>Allow Print	>Allow Messages	Special Permissions
Channel Sales Partners	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Non Returning Customers Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Point Of Service Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Receipts/Refunds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By Region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By Warehouse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - General	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Sales - Touch Interface	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions

COPY ROLES

New RoleSales Rep

Copy FromSales Only

Copy

Cancel

Let's enter 'Sales Rep' as the name of the New Role

ROLE PERMISSIONS

Role

Super User Access

Sales Only

Purchase Only

Marketing Only

Stationery Printing Only

Inventory Control

Sales Rep

'Sales Rep' is now added

Permissions :

Features Accessible To Admin Only

Select All

Deselect All

Load All Features

Feature	>Allow Add	>Allow Edit	>Allow Delete	>Allow View	>Allow Print	>Allow Messages	Special Permissions
Channel Sales Partners	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<div>Special Permissions</div>
Non Returning Customers Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<div>Special Permissions</div>
Point Of Service Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Receipts/Refunds	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Sale Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Sale Performance - By Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Sale Performance - By Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Sale Performance - By Receipt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Sale Performance - By WWT Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Sale Performance - General	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div>Special Permissions</div>
Sales - Touch Interface	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div>Special Permissions</div>
*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div>Special Permissions</div>

Record: 7 of 7

No Filter

Search

Search

All

Start Text

End Text

Record: 7 of 13

No Filter

Search

ROLE PERMISSIONS

Role

Super User Access

Sales Only

Purchase Only

Marketing Only

Stationery Printing Only

Inventory Control

Sales Rep

Record: 7 of 7

No Filter

Search

Search

All

Start Text

End Text

Permissions :

Features Accessible To Admin Only

Select All

Deselect All

Load All Features

Feature	>Allow Add	>Allow Edit	>Allow Delete	>Allow View	>Allow Print	>Allow Messages	Special Permissions
Channel Sales Partners	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Non Returning Customers Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Point Of Service Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Receipts/Refunds	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By Receipt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By WWT Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - General	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Sales - Touch Interface	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Import Unformatted Text Files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Invalid Vouchers							
Items							
Items Category							
Items Label/Sticker Format							
Items Sale/Service Tasks							
Items Transfer							
Journal Vouchers Entries							
Leads							
Ledgers							
Location Master							
Message Templates							
Miscellaneous Settings - Common For All							
Money Wallets							
Multi Sale Book Management							
Non Returning Customers Report							

Let's select Leads from the drop-down list

ROLE PERMISSIONS



Role
Super User Access
Sales Only
Purchase Only
Marketing Only
Stationery Printing Only
Inventory Control
Sales Rep

Permissions :										Features Accessible To Admin Only			Select All	Deselect All	Load All Features
Feature	>Allow Add	>Allow Edit	>Allow Delete	>Allow View	>Allow Print	>Allow Messages	Special Permissions								
Channel Sales Partners	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions							
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions							
Non Returning Customers Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions							
Point Of Service Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions							
Receipts/Refunds	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions							
Sale Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions							
Sale Performance - By Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions							
Sale Performance - By Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions							
Sale Performance - By Receipt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions							
Sale Performance - By WWT Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions							
Sale Performance - General	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions							
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions							
Sales - Touch Interface	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions							
Leads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions							
*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions							

Let's check all the checkboxes.



ROLE PERMISSIONS

Role

Super User Access

Sales Only

Purchase Only

Marketing Only

Stationery Printing Only

Inventory Control

Sales Rep

Permissions :

Features Accessible To Admin Only

Select All

Deselect All

Load All Features

Feature	>Allow Add	>Allow Edit	>Allow Delete	>Allow View	>Allow Print	>Allow Messages	Special Permissions
Channel Sales Partners	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Non Returning Customers Repo				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Point Of Service Management				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Receipts/Refunds				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Orders				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By Customer				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By Items				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By Receipt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - By WWT Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sale Performance - General	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Sales - Touch Interface	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions
*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions

Validation Error

This Permission is not applicable on this Feature.

OK

Record: 7 of 7

No Filter

Search

Record: 14 of 14

No Filter

Search

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.

Role

Super User Access

Sales Only

Purchase Only

Marketing Only

Stationery Printing Only

Inventory Control

Sales Rep

Record: 7 of 7

No Filter

Search

SearchAllStart TextEnd Text

Permissions :		Features Accessible To Admin Only					Select All	Deselect All	Load All Features	
Feature		>Allow Add	>Allow Edit	>Allow Delete	>Allow View	>Allow Print	>Allow Messages	Special Permissions		
<input type="checkbox"/>	Channel Sales Partners	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
<input type="checkbox"/>	Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
<input type="checkbox"/>	Non Returning Customers Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
<input type="checkbox"/>	Point Of Service Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
<input type="checkbox"/>	Receipts/Refunds	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions	
<input type="checkbox"/>	Sale Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions	
<input type="checkbox"/>	Sale Performance - By Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
<input type="checkbox"/>	Sale Performance - By Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
<input type="checkbox"/>	Sale Performance - By Receipt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
<input type="checkbox"/>	Sale Performance - By WWT Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
<input type="checkbox"/>	Sale Performance - General	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
<input type="checkbox"/>	Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions	
<input type="checkbox"/>	Sales - Touch Interface	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions	
<input type="checkbox"/>	Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Special Permissions	
<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Special Permissions	
<input type="checkbox"/>	Items Transfer									
<input type="checkbox"/>	Journal Vouchers Entries									
<input type="checkbox"/>	Leads									
<input type="checkbox"/>	Ledgers									
<input type="checkbox"/>	Location Master									
<input type="checkbox"/>	Message Templates									
<input type="checkbox"/>	Miscellaneous Settings - Common For All									
<input type="checkbox"/>	Money Wallets									
<input type="checkbox"/>	Multi Sale Book Management									
<input type="checkbox"/>	Non Returning Customers Report									
<input type="checkbox"/>	Online File Storage Drives									
<input type="checkbox"/>	Opportunities									
<input type="checkbox"/>	Organization									
<input type="checkbox"/>	Passwords Vault									
<input type="checkbox"/>	Payments/Refunds									
<input type="checkbox"/>	Point Of Service Management									

Record: 14 of 15No FilterSearch

Similarly, let's select the Opportunities feature and include its valid permissions.

Role

Super User Access

Sales Only

Purchase Only

Marketing Only

Stationery Printing Only

Inventory Control

Sales Rep

Record: 7 of 7

No Filter

Search

Search

All

Start Text

End Text

Permissions :

Features Accessible To Admin Only

Select All

Deselect All

Load All Features

Feature	>Allow Add	>Allow Edit	>Allow Delete	>Allow View	>Allow Print	>Allow Messages	Special Permissions
Channel Sales Partners	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<div>Special Permissions</div>
Non Returning Customers Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<div>Special Permissions</div>
Point Of Service Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Receipts/Refunds	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Sale Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Sale Performance - By Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Sale Performance - By Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Sale Performance - By Receipt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Sale Performance - By WWT Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Sale Performance - General	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div>Special Permissions</div>
Sales - Touch Interface	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div>Special Permissions</div>
Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<div>Special Permissions</div>
Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<div>Special Permissions</div>
*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div>Special Permissions</div>

Record: 15 of 15

No Filter

Search

Search forms here

Sales

Customers

Purchases

Suppliers

Inventory

Production

Labels/Stickers

Accounting

Marketing

Administrative Tasks

Statutory Master Data

General Settings

General Master Data

Organization

Click on the Organization menu button

Holidays :

Holiday Name	Date	Refresh
Now, let's assign a Role to a User.		

Check Invalid Records

Events/Reminders

Statutory Reports

Search forms here

Sales

Customers

Purchases

Suppliers

Inventory

Production

Labels/Stickers

Accounting

Marketing

Administrative Tasks

Statutory Master Data

General Settings

General Master Data

Organization

Employees

Organization

Business Section

Passwords Vault

Click on the Employees button

Holidays :

Holiday Name	Date	Refresh

Check Invalid Records

Events/Reminders

Statutory Reports

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Unlock the form

Emp No.	Employee Name
1	David Morgan
2	Steven Reid

Record: 1 of 2No FilterSearch

SearchAllStart TextEnd Text

Basic DetailsCommunicationsSkillsSub ContactsMiscellaneous

Employee No.1

NameDavid Morgan

GenderMaleD.O.B19-07-1984

Marital StatusMarriedAnniversary12-09-2022

DesignationOwner

Contract TypeNA

Hire Date01-02-2021Left Date

ActiveIs Admin

Can Login

^ Note

Default Storage LocationMain Location

Default Bill Book

Default Business Section

Identification Details :

^ Identification Type	Number	Issuing Authority	
▶ Social Security No.	555-54-1270	The Social Security Administration (SSA)	Delete

Photo: Drag File Here

Signature: Drag File Here

UploadExport

Update Login Password



Emp No.	Employee Name
1	David Morgan
2	Kristen Reid

Let's select the employee 'Kristen Reid'

Record: 1 of 2No FilterSearch

SearchAllStart TextEnd Text

Basic DetailsCommunicationsSkillsSub ContactsMiscellaneous

Employee No.1

NameDavid Morgan

GenderMaleD.O.B19-07-1984

Marital StatusMarriedAnniversary12-09-2022

DesignationOwner

Contract TypeNA

Hire Date01-02-2021Left Date

ActiveIs Admin

Can Login

Note

Default Storage LocationMain Location

Default Bill Book

Default Business Section

Photo: Drag File Here

Signature: Drag File Here

UploadExport

Reset Password

Identification Details :

Identification Type	Number	Issuing Authority	
Social Security No.	555-54-1270	The Social Security Administration (SSA)	Delete
*			Delete

EMPLOYEES

1

David Morgan

2

Kristen Reid

Employee No.

2

Name

Kristen Reid

Gender

Female

D.O.B

01-03-2000

Marital Status

Anniversary

Designation

Sales Representative

Contract Type

Hire Date

Left Date

Active

☒

Is Admin

☐

Can Login

☒

^ Note

Default Storage Location

Default Bill Book

Default Business Section

Identification Details :

^ Identification Type

Number

Issuing Authority

Delete

Photo:

Drag File Here

Signature:

Drag File Here

Upload

Export

Update Login Password

If an employee is an 'Admin' then (s)he has all the rights/permissions.
If (s)he is not an admin then we can assign some 'Role' to her/him and thus control the permissions allowed to her/him.



Emp No.	Employee Name
1	David Morgan
2	Kristen Reid

- Basic Details
- Communications
- Skills
- Sub Contacts
- Miscellaneous
- Permissions

Employee No.

2

Name

Kristen Reid

Gender

Female

D.O.B

01-03-2000

Marital Status

Anniversary

Designation

Manager

Contract Type

Hire Date

Left Date

Active

☒

Is Admin

☐

Can Login

☒

^ Note

Default Storage Location

Default Bill Book

Default Business Section

Photo:

Drag File Here

Upload

Export

Reset Password

Signature:

Upload

Export

Click on the Permissions tab

Kristen is not an Admin

Identification Details :

^ Identification Type	Number	Issuing Authority	
			Delete



1David Morgan

2Kristen Reid

Record: 2 of 2

No Filter

Search

Search

AllStart TextEnd Text

Basic DetailsCommunicationsSkillsSub ContactsMiscellaneousPermissions

Employee Role : Sales Only

Feature	>Allow	>Allow View	>Allow Print	>Allow Messages	Special Permissions
Channel Sales Partners	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Special Permissions
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Special Permissions
Non Returning Customers Report	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Special Permissions
Point Of Service Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Special Permissions
Receipts/Refunds	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Special Permissions
Sale Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Special Permissions
Sale Performance - By Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Special Permissions
Sale Performance - By Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Special Permissions
Sale Performance - By Receipt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Special Permissions
Sale Performance - By WWT Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Special Permissions
Sale Performance - General	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Special Permissions
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Special Permissions
Sales - Touch Interface	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Special Permissions
*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Special Permissions

Record: 1 of 13No FilterSearch

Currently, Kristen is assigned the Role: 'Sales Only'.
Let's assign the role we just created - 'Sales Rep'

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Emp No.	Employee Name
1	David Morgan
2	Kristen Reid

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SearchAllStart TextEnd Text

Basic DetailsCommunicationsSkillsSub ContactsMiscellaneousPermissions

Employee Role : Sales Only

Inventory Control

Marketing Only

Purchase Only

Sales Only

Sales Rep

Stationery Printing Only

Super User Access

	Allow Add	>Allow Edit	>Allow Delete	>Allow View	>Allow Print	>Allow Messages	Special Permissions
▶ Channel Sales Par	☑	☑	☑	☑	☐	☐	Special Permissions
Customers	☑	☑	☑	☑	☐	☑	Special Permissions
Non Returning Cus	☐	☐	☐	☑	☐	☑	Special Permissions
Point Of Service Management	☑	☑	☑	☑	☐	☐	Special Permissions
Receipts/Refunds	☑	☑	☑	☑	☑	☐	Special Permissions
Sale Orders	☑	☑	☑	☑	☑	☐	Special Permissions
Sale Performance - By Customer	☐	☐	☐	☑	☐	☐	Special Permissions
Sale Performance - By Items	☐	☐	☐	☑	☐	☐	Special Permissions
Sale Performance - By Receipt	☐	☐	☐	☑	☐	☐	Special Permissions
Sale Performance - By WWT Items	☐	☐	☐	☑	☐	☐	Special Permissions
Sale Performance - General	☐	☐	☐	☑	☐	☐	Special Permissions
Sales	☑	☑	☑	☑	☑	☑	Special Permissions
Sales - Touch Interface	☑	☑	☐	☐	☑	☑	Special Permissions
*	☐	☐	☐	☐	☐	☐	Special Permissions

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1David Morgan

2Kristen Reid

Record: 2 of 2

No Filter

Search

AllStart TextEnd Text

Basic DetailsCommunicationsSkillsSub ContactsMiscellaneousPermissions

Employee Role : Sales Rep

Feature	>Allow Add	>Allow Edit	>Allow Delete	>Allow View	>Allow Print	>Allow Messages	Special Permissions
Channel Sales Partners	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Special Permissions
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Special Permissions
Non Returning Customers Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> Special Permissions
Point Of Service Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Special Permissions
Receipts/Refunds	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Special Permissions
Sale Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Special Permissions
Sale Performance - By Customer				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Special Permissions
Sale Performance - By Items				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Special Permissions
Sale Performance - By Receipt				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Special Permissions
Sale Performance - By WWT Items				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Special Permissions
Sale Performance - General				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Special Permissions
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Special Permissions
Sales - Touch Interface	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Special Permissions
*	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Special Permissions

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Microsoft Access

Do you want to assign new roles for the user : Kristen Reid?

YesNo



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