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Quickstore: User Security Settings for Standard Security Levels

Scott Leonard - 2017-06-22 - in QuickStore

Level 1: Fewest privileges

Customers Inventory Maint/Misc Reporting Sales Setup
✓ Create new customers
Set customer pricing and billing options
Modify customer information
Delete customers
Create and modify customer contracts View customer contracts
View customer contracts Create and modify customer standards
Reset customer allowance settings
Assess customer finance charges
Override customer terms and credit limits
Customers Inventory Maint/Misc Reporting Sales Setup
Print barcoded price tags Create purchase orders
Add new inventory items Modify purchase orders
Modify inventory items Allocate specials to purchase orders
Delete inventory items Create receiving lists
Modify stock quantities Modify receiving lists
∇iew inventory costs and information Create inventory transfer lists Create and modify inventory standards Modify inventory transfer lists
Create and modify vendors
Delete a vendor Update system inventory with physical
Customers Inventory Maint/Misc Reporting Sales Setup
Run the nightly batch process Use training mode for practicing
Set the month-end parameters Update vendor payables in AP
Perform the month-end process
Perform year-end functions Shift in and out a cash drawer
Reset negative inventory values Shift out other users
Perform automated max/min adjustments Close out cash drawer shifts, Add, modify, and delete drawer shifts
Create backup data sets Add, modify, and delete work order forms
Restore backup data sets
Export/Import customers and inventory
Clock in and out
Add, modify, and delete time clock entries View credit card numbers
Customers Inventory Maint/Misc Reporting Sales Setup
Run daily checkout and manifest reports
Run daily checkout and manifest reports Run cash flow Run inventory value reports Run inventory to order reports
Run daily checkout and manifest reports Run cash flow Run inventory value reports Run inventory to order reports Run sales reports and totals
Run daily checkout and manifest reports Run cash flow Run inventory value reports Run inventory to order reports Run sales reports and totals Run accounts receivable reports and totals
Run daily checkout and manifest reports Run cash flow Run inventory value reports Run inventory to order reports Run sales reports and totals Run accounts receivable reports and totals Print mailing labels
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Run daily checkout and manifest reports Run cash flow Run inventory value reports Run asses reports and totals Run accounts receivable reports and totals Print mailing labels Print time clock and cash drawer reports Customers Inventory Maint/Misc Reporting Print time clock and cash drawer reports Customers Inventory Maint/Misc Reporting Print time clock and cash drawer reports Customers Inventory Maint/Misc Reporting Print time clock and cash drawer reports Customers Inventory Maint/Misc Reporting Print time clock and cash drawer reports Customers Inventory Maint/Misc Reporting Pull items from stock for orders Delete any type of sales invoice Pull items from stock for orders Set the tax rate or tax status in sales entry Adjust open items Set the tax rate or tax status in sales entry Adjust work completed Take additional payments at POS Receive payments on-account Modify sales and gift certificates Receive payment received Modify notes on any sales entry item Void any payment received Modify quotes Delete any payment received Create debit payments in payment entry Customers Inventory Maint/Misc Reporting Sales Setup Modify printer selections Modify system options Create and modify stores and settings Create and modify shipping options Create and modify shipping options Create and modify shipping options Create and modify payment types
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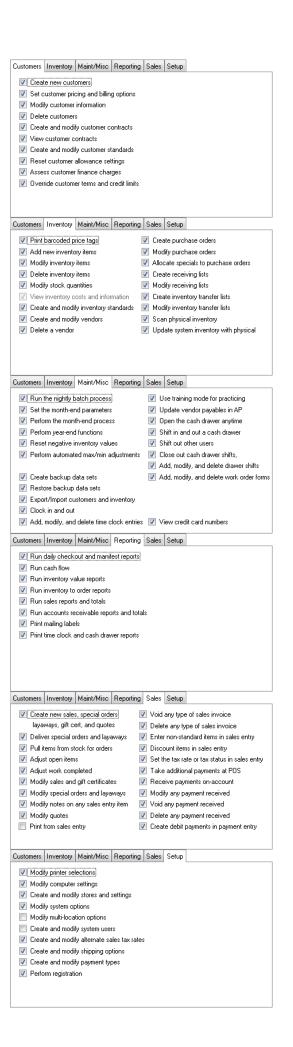
Level 2

✓ Create new customers	
✓ Set customer pricing and billing options ✓ Modify customer information Delete customers Create and modify customer contracts View customer contracts Create and modify customer standards Create and modify customer standards Reset customer allowance settings Assess customer finance charges Override customer terms and credit limits Customers Inventory Maint/Misc Reporting Sales Setup Print barcoded price tags	
Add new inventory items Modify purchase orders	
Modify inventory items ☐ Allocate specials to purchase orders ☐ Delete inventory items ☑ Create receiving lists	
✓ Modify stock quantities Modify receiving lists	
✓ View inventory costs and information ☐ Create inventory transfer lists	
☐ Create and modify inventory standards ☐ Modify inventory transfer lists ☐ Create and modify vendors ☑ Scan physical inventory	
☐ Delete a vendor ☐ Update system inventory with physical	
Customers Inventory Maint/Misc Reporting Sales Setup	
Run the nightly batch process V Use training mode for practicing	
Set the month-end parameters Update vendor payables in AP	
✓ Perform the month-end process ☐ Open the cash drawer anytime Perform year-end functions ✓ Shift in and out a cash drawer	
Reset negative inventory values Shift out other users	
Perform automated max/min adjustments Close out cash drawer shifts,	
Add, modify, and delete drawer shifts Create backup data sets Add, modify, and delete work order fr	
Restore backup data sets	511110
 Export/Import customers and inventory ✓ Clock in and out 	
Add, modify, and delete time clock entries View credit card numbers	
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Level 3: Medium

 ✓ Create new customers ✓ Set customer pricing and billing options 	Customers Inventory Maint/Misc Reporting Sales Setup		
Modify customer information Delete customers Create and modify customer contracts View customer contracts Create and modify customer standards Reset customer allowance settings Assess customer finance charges Override customer terms and credit limits			
Customers Inventory Maint/Misc Reportin	g Sales Setup		
Print barcoded price tags	✓ Create purchase orders		
 Add new inventory items Modify inventory items 	Modify purchase orders Allocate specials to purchase orders		
Delete inventory items	✓ Create receiving lists		
Modify stock quantities	Modify receiving lists		
 View inventory costs and information Create and modify inventory standards 	Create inventory transfer lists Modify inventory transfer lists		
Create and modify vendors	Scan physical inventory		
Delete a vendor	Update system inventory with physical		
Customers Inventory Maint/Misc Reportin	g Sales Setup		
	-		
Run the nightly batch process Set the month-end parameters	 ✓ Use training mode for practicing ✓ Update vendor payables in AP 		
Perform the month-end process	Open the cash drawer anytime		
Perform year end functions	Shift in and out a cash drawer		
 Reset negative inventory values Perform automated max/min adjustment 	Shift out other users Close out cash drawer shifts, □		
	Add, modify, and delete drawer shifts		
✓ Create backup data sets	Add, modify, and delete work order forms		
 Restore backup data sets Export/Import customers and inventory 			
Clock in and out			
Add, modify, and delete time clock entri	es 🔲 View credit card numbers		
Customers Inventory Maint/Misc Reporting	g Sales Setup		
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Level 4



Level 5: Most privileges

