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Quickstore: User Security Settings for Standard Security Levels

Scott Leonard - 2025-01-06 - [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
- 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 inventory items
- Delete inventory items
- Modify stock quantities
- View inventory costs and information
- Create and modify inventory standards
- Create and modify vendors
- Delete a vendor
- Create purchase orders
- Modify purchase orders
- Allocate specials to purchase orders
- Create receiving lists
- Modify receiving lists
- Create inventory transfer lists
- Modify inventory transfer lists
- Scan physical inventory
- Update system inventory with physical

Customers Inventory Maint/Misc Reporting Sales Setup

- Run the nightly batch process
- Set the month-end parameters
- Perform the month-end process
- Perform year-end functions
- Reset negative inventory values
- Perform automated max/min adjustments
- Create backup data sets
- Restore backup data sets
- Export/Import customers and inventory
- Clock in and out
- Add, modify, and delete time clock entries
- Use training mode for practicing
- Update vendor payables in AP
- Open the cash drawer anytime
- Shift in and out a cash drawer
- Shift out other users
- Close out cash drawer shifts
- Add, modify, and delete drawer shifts
- Add, modify, and delete work order forms
- View credit card numbers

Customers Inventory Maint/Misc Reporting Sales Setup

- 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
- Print time clock and cash drawer reports

Customers Inventory Maint/Misc Reporting Sales Setup

- Create new sales, special orders, layaways, gift cert, and quotes
- Deliver special orders and layaways
- Pull items from stock for orders
- Adjust open items
- Adjust work completed
- Modify sales and gift certificates
- Modify special orders and layaways
- Modify notes on any sales entry item
- Modify quotes
- Print from sales entry
- Void any type of sales invoice
- Delete any type of sales invoice
- Enter non-standard items in sales entry
- Discount items in sales entry
- Set the tax rate or tax status in sales entry
- Take additional payments at PDS
- Receive payments on-account
- Modify any payment received
- Void any payment received
- Delete any payment received
- Create debit payments in payment entry

Customers Inventory Maint/Misc Reporting Sales Setup

- Modify printer selections
- Modify computer settings
- Create and modify stores and settings
- Modify system options
- Modify multi-location options
- Create and modify system users
- Create and modify alternate sales tax rates
- Create and modify shipping options
- Create and modify payment types
- Perform registration

Level 2

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
- 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 inventory items
- Delete inventory items
- Modify stock quantities
- View inventory costs and information
- Create and modify inventory standards
- Create and modify vendors
- Delete a vendor
- Create purchase orders
- Modify purchase orders
- Allocate specials to purchase orders
- Create receiving lists
- Modify receiving lists
- Create inventory transfer lists
- Modify inventory transfer lists
- Scan physical inventory
- Update system inventory with physical

Customers Inventory Maint/Misc Reporting Sales Setup

- Run the nightly batch process
- Set the month-end parameters
- Perform the month-end process
- Perform year-end functions
- Reset negative inventory values
- Perform automated max/min adjustments
- Create backup data sets
- Restore backup data sets
- Export/Import customers and inventory
- Clock in and out
- Add, modify, and delete time clock entries
- Use training mode for practicing
- Update vendor payables in AP
- Open the cash drawer anytime
- Shift in and out a cash drawer
- Shift out other users
- Close out cash drawer shifts
- Add, modify, and delete drawer shifts
- Add, modify, and delete work order forms
- View credit card numbers

Customers Inventory Maint/Misc Reporting Sales Setup

- 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
- Print time clock and cash drawer reports

Customers Inventory Maint/Misc Reporting Sales Setup

- Create new sales, special orders, layaways, gift cert, and quotes
- Deliver special orders and layaways
- Pull items from stock for orders
- Adjust open items
- Adjust work completed
- Modify sales and gift certificates
- Modify special orders and layaways
- Modify notes on any sales entry item
- Modify quotes
- Print from sales entry
- Void any type of sales invoice
- Delete any type of sales invoice
- Enter non-standard items in sales entry
- Discount items in sales entry
- Set the tax rate or tax status in sales entry
- Take additional payments at PDS
- Receive payments on-account
- Modify any payment received
- Void any payment received
- Delete any payment received
- Create debit payments in payment entry

Customers Inventory Maint/Misc Reporting Sales Setup

- Modify printer selections
- Modify computer settings
- Create and modify stores and settings
- Modify system options
- Modify multi-location options
- Create and modify system users
- Create and modify alternate sales tax rates
- Create and modify shipping options
- Create and modify payment types
- Perform registration

Level 3: Medium

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
- 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 inventory items
- Delete inventory items
- Modify stock quantities
- View inventory costs and information
- Create and modify inventory standards
- Create and modify vendors
- Delete a vendor
- Create purchase orders
- Modify purchase orders
- Allocate specials to purchase orders
- Create receiving lists
- Modify receiving lists
- Create inventory transfer lists
- Modify inventory transfer lists
- Scan physical inventory
- Update system inventory with physical

Customers Inventory Maint/Misc Reporting Sales Setup

- Run the nightly batch process
- Set the month-end parameters
- Perform the month-end process
- Perform year-end functions
- Reset negative inventory values
- Perform automated max/min adjustments
- Create backup data sets
- Restore backup data sets
- Export/Import customers and inventory
- Clock in and out
- Add, modify, and delete time clock entries
- Use training mode for practicing
- Update vendor payables in AP
- Open the cash drawer anytime
- Shift in and out a cash drawer
- Shift out other users
- Close out cash drawer shifts
- Add, modify, and delete drawer shifts
- Add, modify, and delete work order forms
- View credit card numbers

Customers Inventory Maint/Misc Reporting Sales Setup

- 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
- Print time clock and cash drawer reports

Customers Inventory Maint/Misc Reporting Sales Setup

- Create new sales, special orders, layaways, gift cert, and quotes
- Deliver special orders and layaways
- Pull items from stock for orders
- Adjust open items
- Adjust work completed
- Modify sales and gift certificates
- Modify special orders and layaways
- Modify notes on any sales entry item
- Modify quotes
- Print from sales entry
- Void any type of sales invoice
- Delete any type of sales invoice
- Enter non-standard items in sales entry
- Discount items in sales entry
- Set the tax rate or tax status in sales entry
- Take additional payments at PDS
- Receive payments on-account
- Modify any payment received
- Void any payment received
- Delete any payment received
- Create debit payments in payment entry

Customers Inventory Maint/Misc Reporting Sales Setup

- Modify printer selections
- Modify computer settings
- Create and modify stores and settings
- Modify system options
- Modify multi-location options
- Create and modify system users
- Create and modify alternate sales tax rates
- Create and modify shipping options
- Create and modify payment types
- Perform registration

Level 4

Customers	Inventory	Maint/Misc	Reporting	Sales	Setup
<input checked="" type="checkbox"/> <u>Create new customers</u> <input checked="" type="checkbox"/> Set customer pricing and billing options <input checked="" type="checkbox"/> Modify customer information <input checked="" type="checkbox"/> Delete customers <input checked="" type="checkbox"/> Create and modify customer contracts <input checked="" type="checkbox"/> View customer contracts <input checked="" type="checkbox"/> Create and modify customer standards <input checked="" type="checkbox"/> Reset customer allowance settings <input checked="" type="checkbox"/> Assess customer finance charges <input checked="" type="checkbox"/> Override customer terms and credit limits					

Customers	Inventory	Maint/Misc	Reporting	Sales	Setup
<input checked="" type="checkbox"/> <u>Print barcoded price tags</u> <input checked="" type="checkbox"/> Add new inventory items <input checked="" type="checkbox"/> Modify inventory items <input checked="" type="checkbox"/> Delete inventory items <input checked="" type="checkbox"/> Modify stock quantities <input type="checkbox"/> View inventory costs and information <input checked="" type="checkbox"/> Create and modify inventory standards <input checked="" type="checkbox"/> Create and modify vendors <input checked="" type="checkbox"/> Delete a vendor <input checked="" type="checkbox"/> Create purchase orders <input checked="" type="checkbox"/> Modify purchase orders <input checked="" type="checkbox"/> Allocate specials to purchase orders <input checked="" type="checkbox"/> Create receiving lists <input checked="" type="checkbox"/> Modify receiving lists <input checked="" type="checkbox"/> Create inventory transfer lists <input checked="" type="checkbox"/> Modify inventory transfer lists <input checked="" type="checkbox"/> Scan physical inventory <input checked="" type="checkbox"/> Update system inventory with physical					

Customers	Inventory	Maint/Misc	Reporting	Sales	Setup
<input checked="" type="checkbox"/> <u>Run the nightly batch process</u> <input checked="" type="checkbox"/> Set the month-end parameters <input checked="" type="checkbox"/> Perform the month-end process <input checked="" type="checkbox"/> Perform year-end functions <input checked="" type="checkbox"/> Reset negative inventory values <input checked="" type="checkbox"/> Perform automated max/min adjustments <input checked="" type="checkbox"/> Create backup data sets <input checked="" type="checkbox"/> Restore backup data sets <input checked="" type="checkbox"/> Export/Import customers and inventory <input checked="" type="checkbox"/> Clock in and out <input checked="" type="checkbox"/> Add, modify, and delete time clock entries <input checked="" type="checkbox"/> Use training mode for practicing <input checked="" type="checkbox"/> Update vendor payables in AP <input checked="" type="checkbox"/> Open the cash drawer anytime <input checked="" type="checkbox"/> Shift in and out a cash drawer <input checked="" type="checkbox"/> Shift out other users <input checked="" type="checkbox"/> Close out cash drawer shifts, <input checked="" type="checkbox"/> Add, modify, and delete drawer shifts <input checked="" type="checkbox"/> Add, modify, and delete work order forms <input checked="" type="checkbox"/> View credit card numbers					

Customers	Inventory	Maint/Misc	Reporting	Sales	Setup
<input checked="" type="checkbox"/> <u>Run daily checkout and manifest reports</u> <input checked="" type="checkbox"/> Run cash flow <input checked="" type="checkbox"/> Run inventory value reports <input checked="" type="checkbox"/> Run inventory to order reports <input checked="" type="checkbox"/> Run sales reports and totals <input checked="" type="checkbox"/> Run accounts receivable reports and totals <input checked="" type="checkbox"/> Print mailing labels <input checked="" type="checkbox"/> Print time clock and cash drawer reports					

Customers	Inventory	Maint/Misc	Reporting	Sales	Setup
<input checked="" type="checkbox"/> <u>Create new sales, special orders, layaways, gift cert, and quotes</u> <input checked="" type="checkbox"/> Deliver special orders and layaways <input checked="" type="checkbox"/> Pull items from stock for orders <input checked="" type="checkbox"/> Adjust open items <input checked="" type="checkbox"/> Adjust work completed <input checked="" type="checkbox"/> Modify sales and gift certificates <input checked="" type="checkbox"/> Modify special orders and layaways <input checked="" type="checkbox"/> Modify notes on any sales entry item <input checked="" type="checkbox"/> Modify quotes <input type="checkbox"/> Print from sales entry <input checked="" type="checkbox"/> Void any type of sales invoice <input checked="" type="checkbox"/> Delete any type of sales invoice <input checked="" type="checkbox"/> Enter non-standard items in sales entry <input checked="" type="checkbox"/> Discount items in sales entry <input checked="" type="checkbox"/> Set the tax rate or tax status in sales entry <input checked="" type="checkbox"/> Take additional payments at PDS <input checked="" type="checkbox"/> Receive payments on-account <input checked="" type="checkbox"/> Modify any payment received <input checked="" type="checkbox"/> Void any payment received <input checked="" type="checkbox"/> Delete any payment received <input checked="" type="checkbox"/> Create debit payments in payment entry					

Customers	Inventory	Maint/Misc	Reporting	Sales	Setup
<input checked="" type="checkbox"/> <u>Modify printer selections</u> <input checked="" type="checkbox"/> Modify computer settings <input checked="" type="checkbox"/> Create and modify stores and settings <input checked="" type="checkbox"/> Modify system options <input type="checkbox"/> Modify multi-location options <input type="checkbox"/> Create and modify system users <input checked="" type="checkbox"/> Create and modify alternate sales tax rates <input checked="" type="checkbox"/> Create and modify shipping options <input checked="" type="checkbox"/> Create and modify payment types <input checked="" type="checkbox"/> Perform registration					

Level 5: Most privileges

Customers	Inventory	Maint/Misc	Reporting	Sales	Setup
<input checked="" type="checkbox"/>					<u>Create new customers</u>
<input checked="" type="checkbox"/>					Set customer pricing and billing options
<input checked="" type="checkbox"/>					Modify customer information
<input checked="" type="checkbox"/>					Delete customers
<input checked="" type="checkbox"/>					Create and modify customer contracts
<input checked="" type="checkbox"/>					View customer contracts
<input checked="" type="checkbox"/>					Create and modify customer standards
<input checked="" type="checkbox"/>					Reset customer allowance settings
<input checked="" type="checkbox"/>					Assess customer finance charges
<input checked="" type="checkbox"/>					Override customer terms and credit limits

Customers	Inventory	Maint/Misc	Reporting	Sales	Setup
<input checked="" type="checkbox"/>					<u>Print barcoded price tags</u>
<input checked="" type="checkbox"/>					Add new inventory items
<input checked="" type="checkbox"/>					Modify inventory items
<input checked="" type="checkbox"/>					Delete inventory items
<input checked="" type="checkbox"/>					Modify stock quantities
<input checked="" type="checkbox"/>					View inventory costs and information
<input checked="" type="checkbox"/>					Create and modify inventory standards
<input checked="" type="checkbox"/>					Create and modify vendors
<input checked="" type="checkbox"/>					Delete a vendor
				<input checked="" type="checkbox"/>	Create purchase orders
				<input checked="" type="checkbox"/>	Modify purchase orders
				<input checked="" type="checkbox"/>	Allocate specials to purchase orders
				<input checked="" type="checkbox"/>	Create receiving lists
				<input checked="" type="checkbox"/>	Modify receiving lists
				<input checked="" type="checkbox"/>	Create inventory transfer lists
				<input checked="" type="checkbox"/>	Modify inventory transfer lists
				<input checked="" type="checkbox"/>	Scan physical inventory
				<input checked="" type="checkbox"/>	Update system inventory with physical

Customers	Inventory	Maint/Misc	Reporting	Sales	Setup
<input checked="" type="checkbox"/>					<u>Run the nightly batch process</u>
<input checked="" type="checkbox"/>					Set the month-end parameters
<input checked="" type="checkbox"/>					Perform the month-end process
<input checked="" type="checkbox"/>					Perform year-end functions
<input checked="" type="checkbox"/>					Reset negative inventory values
<input checked="" type="checkbox"/>					Perform automated max/min adjustments
<input checked="" type="checkbox"/>					Create backup data sets
<input checked="" type="checkbox"/>					Restore backup data sets
<input checked="" type="checkbox"/>					Export/Import customers and inventory
<input checked="" type="checkbox"/>					Clock in and out
<input checked="" type="checkbox"/>					Add, modify, and delete time clock entries
				<input checked="" type="checkbox"/>	Use training mode for practicing
				<input checked="" type="checkbox"/>	Update vendor payables in AP
				<input checked="" type="checkbox"/>	Open the cash drawer anytime
				<input checked="" type="checkbox"/>	Shift in and out a cash drawer
				<input checked="" type="checkbox"/>	Shift out other users
				<input checked="" type="checkbox"/>	Close out cash drawer shifts,
				<input checked="" type="checkbox"/>	Add, modify, and delete drawer shifts
				<input checked="" type="checkbox"/>	Add, modify, and delete work order forms
				<input checked="" type="checkbox"/>	View credit card numbers

Customers	Inventory	Maint/Misc	Reporting	Sales	Setup
<input checked="" type="checkbox"/>					<u>Run daily checkout and manifest reports</u>
<input checked="" type="checkbox"/>					Run cash flow
<input checked="" type="checkbox"/>					Run inventory value reports
<input checked="" type="checkbox"/>					Run inventory to order reports
<input checked="" type="checkbox"/>					Run sales reports and totals
<input checked="" type="checkbox"/>					Run accounts receivable reports and totals
<input checked="" type="checkbox"/>					Print mailing labels
<input checked="" type="checkbox"/>					Print time clock and cash drawer reports

Customers	Inventory	Maint/Misc	Reporting	Sales	Setup
<input checked="" type="checkbox"/>					<u>Create new sales, special orders,</u>
					layaways, gift cert, and quotes
<input checked="" type="checkbox"/>					Deliver special orders and layaways
<input checked="" type="checkbox"/>					Pull items from stock for orders
<input checked="" type="checkbox"/>					Adjust open items
<input checked="" type="checkbox"/>					Adjust work completed
<input checked="" type="checkbox"/>					Modify sales and gift certificates
<input checked="" type="checkbox"/>					Modify special orders and layaways
<input checked="" type="checkbox"/>					Modify notes on any sales entry item
<input checked="" type="checkbox"/>					Modify quotes
<input type="checkbox"/>					Print from sales entry
				<input checked="" type="checkbox"/>	Void any type of sales invoice
				<input checked="" type="checkbox"/>	Delete any type of sales invoice
				<input checked="" type="checkbox"/>	Enter non-standard items in sales entry
				<input checked="" type="checkbox"/>	Discount items in sales entry
				<input checked="" type="checkbox"/>	Set the tax rate or tax status in sales entry
				<input checked="" type="checkbox"/>	Take additional payments at POS
				<input checked="" type="checkbox"/>	Receive payments on-account
				<input checked="" type="checkbox"/>	Modify any payment received
				<input checked="" type="checkbox"/>	Void any payment received
				<input checked="" type="checkbox"/>	Delete any payment received
				<input checked="" type="checkbox"/>	Create debit payments in payment entry

Customers	Inventory	Maint/Misc	Reporting	Sales	Setup
<input checked="" type="checkbox"/>					<u>Modify printer selections</u>
<input checked="" type="checkbox"/>					Modify computer settings
<input checked="" type="checkbox"/>					Create and modify stores and settings
<input checked="" type="checkbox"/>					Modify system options
<input checked="" type="checkbox"/>					Modify multi-location options
<input checked="" type="checkbox"/>					Create and modify system users
<input checked="" type="checkbox"/>					Create and modify alternate sales tax rates
<input checked="" type="checkbox"/>					Create and modify shipping options
<input checked="" type="checkbox"/>					Create and modify payment types
<input checked="" type="checkbox"/>					Perform registration