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
- ☐ 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 POS
- ☐ 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 POS
- ☑ 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

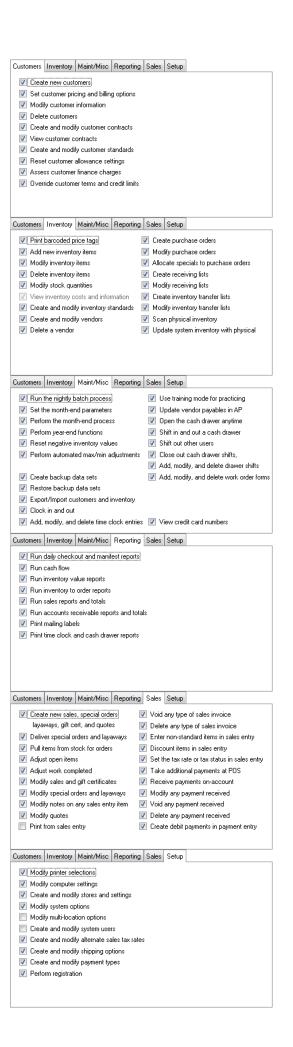**Customers** | Inventory | Maint/Misc | Reporting | Sales | Setup

- ☑ 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 POS
- ☑ 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 |

- ☑ 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 POS
- ☑ 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 5: Most 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 POS
- ☑ 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