List of permissions:

Below is a list of the security permissions that you can add to an individual OR a group.

Admin - Accounting

- Can Access Accounting Tree Branch: Grants access to features in the Accounting Tree Branch that do not require specific permissions. The Accounting tree branch is only listed on the Administration Tab if this permission is selected.
- AP – Accounts Payable Aging: Allows user to run the AP Aging report. This permission must be selected in conjunction with the “Can Access Accounting Tree Branch” permission.
- AP – Cancel Vendor Payment: Grants access to cancel vendor payments in any open accounting period. This permission must be selected in conjunction with one of the following permission options: Vendors – Update, Can Access Accounting Tree Branch, Vendors – Search & Vendors – Update
- AP - Credit Card Charges:
- AP - Credit Card Charges - Void:
- AP - Credit Card Statements:
- AP – Debit Memo – Can Cancel: Allows user to cancel existing Debit Memo’s. This permission must be selected in conjunction with at least one of the following permissions: Vendors – Update, Can Access ACCOUNTING Tree Branch, Vendors – Search & Vendors - Update.
- AP – Debit Memo – Can Create: Allows user to create Debit Memo’s (vendor credits). This permission must be selected in conjunction with at least one of the following permissions: Vendors – Update, Can Access ACCOUNTING Tree Branch, Vendors – Search & Vendors - Update.
- AP – Pay Bills: Allows user to Pay Bills. This permission must be selected in conjunction with the “Can Access ACCOUNTING Tree Branch” permission.
- AP – Pay Bills – Can See Bank Balance: Grants access to view the bank account balance in the lower left corner of the Pay Bills screen. This permission must be selected in conjunction with the following permissions: Can Access ACCOUNTING Tree Branch, AP – Pay Bills.
- AP – Vendor Invoice - Add: Grants access to a vendor bills for inventory (Bill Inventory) and general expenses (Bill Other). This permission must be selected in conjunction with at least one of the following permissions: Vendors – Update, Can Access ACCOUNTING Tree Branch, Vendors – Search & Vendors – Update
- AP – Vendor Invoice – Can Cancel: Grants access to cancel (void) Vendor Invoices. Invoice must be dated within an open accounting period to void or cancel. This permission must be selected in conjunction with at least one of the following permissions: Vendors – Update, Can Access ACCOUNTING Tree Branch, Vendors – Search & Vendors - Update.
- AP – Vendor Invoice - Search: Grants access to view a list of outstanding vendor invoices in the system. This permission must be selected in conjunction with the “Can Access ACCOUNTING Tree Branch” permission.
- AR - Accounts Receivable Aging:
- AR – Customer Payment Search and Edit Utility: Grants access to search and edit Customer Payments. Payments that have been deposited and/or posted are not

available for editing. This permission must be selected in conjunction with the "Can Access ACCOUNTING Tree Branch" permission.

- AR – Customer Statements: Grants access to view, print or print to screen any Customer Statement. This permission must be selected in conjunction with at least one of the following permissions: Can Access Accounting Tree Branch, Update Customer.
- AR – Finance Charges – Can Assess: Allows user to assess finance charges on overdue customer invoices. This permission must be selected in conjunction with at least one of the following permissions: Can Access ACCOUNTING Tree Branch, Update Customer.
- AR – Finance Charges – Can Cancel: Grants access to cancel any Finance Charges that have been created. This permission must be selected in conjunction with at least one of the following permissions: Can Access ACCOUNTING Tree Branch, Update Customer.
- AR – Statement Charges – Can Add: Grants access to Statement Charges to Customers. This permission must be selected in conjunction with at least one of the following permissions: Can Access ACCOUNTING Tree Branch, Update Customer.
- AR – Statement Charges – Can Cancel: Grants access to cancel any existing Statement Charges. This permission must be selected in conjunction with at least one of the following permissions: Can Access ACCOUNTING Tree Branch, Update Customer.
- BANK – Bank Deposits: Grants access to Make Deposits, Merchant Card Sweep and Search Deposits. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- BANK – Bank Statements: Grants access to create and update Bank Reconciliations. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- BANK – Can Change Payee Information: Allows user to change the Payee information on checks. This permission must be selected in conjunction with at least one of the following permissions: Can Access Accounting Tree Branch, BANK - Write Checks.
- BANK - Can Change Payee Information:
- BANK - Can Search/Update Employee Checks:
- BANK – Print Checks: Grants access to Print Checks that have been placed in the print queue. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- BANK – Reprint Check: Allows user to reprint checks. This permission must be selected in conjunction with at least one of the following permissions: Can Access Accounting Tree Branch, BANK - Print Checks
- BANK - Search Checks:
- BANK - Void Checks:
- BANK – Write Checks: Grants access to Write Checks. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- GENERAL JOURNAL ENTRY – Can Add/Update: Grants access to view, add and update (unposted) Journal Entries. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.

- POSTING – Can Post: Allows user to initiate posting of transactions to the general ledger. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- POSTING – Can View from Transaction Shortcut: Grants access to view posting information within a transaction. You can view this by first having access to the transaction, then by clicking on the status field in most transactions (such as vendor invoices or customer statement charges). This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- Report – Balance Sheet: Grants access to the Balance Sheet financial report. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- Report – Bank Register: Grants access to view the Bank Register. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- Report – Customer Deposit Liability: Grants access to the Customer Deposit Liability report. This permission must be selected in conjunction with at least one of the following permissions: Can Access Accounting Tree Branch, Can Access Reports – Accounting.
- Report – General Ledger: Grants access to the General Ledger report. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- Report – Income Statement: Grants access to the Income Statement financial report. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- Report – Posting Activity: Grants access the Posting Activity report. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- Report – Trial Balance: Grants access to the Trial Balance report. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- SETUP - Accounting Defaults: Allows user to edit Accounting Defaults. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- SETUP - Accounting Periods: Allows user to add and update Accounting Periods. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- SETUP - Accounting Periods – Change Status: Allows user to open and close existing Accounting Periods. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- SETUP – Chart of Accounts: Allows user to view, add and update the Chart of Accounts. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- SETUP – Default Bill To: Allows user to add and update the Default Bill To Address. This address displays on Vendor Purchase Orders. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.

- SETUP – Floor Plans: Allows user to add and update Floor Plans. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- SETUP – Payment Methods: Allows user to add and edit Payment Methods. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- SETUP – Payment Terms: Allows user to add and edit Payment Terms. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- SETUP – Sales Tax Post Codes: Allows user to edit Sales Tax Post Codes. This feature allows Evosus to automatically charge the correct Sales Tax amount based on the customers ship to zip code. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- SETUP – Sales Taxes: Allows user to add and edit Sales Tax. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- SETUP – Statement Charges Reason: Allows user to add and edit Statement Charge Reasons. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.
- SETUP – Tax Authorities: Allows user to add and edit Tax Authorities. This permission must be selected in conjunction with the "Can Access Accounting Tree Branch" permission.

Admin - Inventory

- Can Access INVENTORY Tree Branch: Grants access to the Inventory Tree Branch including areas that do not require any other specific permission's in this category *(listed below). The Inventory tree branch will not be listed on the Administration tab if this permission is not selected. Must be used with the following security permission(s): Access to the Inventory > Return Goods Authorizations tree branch is only available when the "Can Access Inventory Tree Branch" permission is selected in conjunction with the RGA permissions available under the Admin – Service/Delivery permission category. See the Admin – Service/Delivery permissions document for more information on specific RGA permissions.

**Gives access to the following features:

#1 Search Items *(Administration > Inventory)*
#2 Add RGA *(Administration > Inventory > Return Goods Authorizations)*
#3 Search RGAs *(Administration > Inventory > Return Goods Authorizations)*
#4 Search and Apply RGA Receipts *(Administration > Inventory > Return Goods Authorizations)*
#5 RGA Register Report *(Administration > Inventory > Return Goods Authorizations)*
#6 Create Snapshot of Current Inventory *(Administration > Inventory > Utilities)*
#7 Reclassify Items Batch Process *(Administration > Inventory > Utilities)*
#8 Inventory Tree Mapper *(Administration > Inventory > Utilities)*

#9 Import New Inventory Items From and Excel Spreadsheet *(Administration > Inventory > Utilities)*
#10 Mass Update Existing Inventory Items From an Excel Spreadsheet *(Administration > Inventory > Utilities)*
#11 Import Pictures from Watkins DeTECHtive® *(Administration > Inventory > Utilities)*
#12 Process Inventory Items Cache *(Administration > Inventory > Utilities)*
#13 Store Stock Site Relationships *(Administration > Inventory > General Setup)*
#14 Inter Company Purchase Order Types *(Administration > Inventory > General Setup)*
#15 Stock Adjustment Reasons *(Administration > Inventory > General Setup)*

- Can Maintain Serial Numbers: Grants access to add and update Serial Numbers for items. Serial Numbers are allowed to be deleted under the options button within the item profile; you will be warned if the serial number is attached to an item that has been sold already. Must be used with the following security permissions: Item – Add, Item - Update.

**Gives access to these features:

#1 Inventory > Select Item > Serial No's Button

#2 Inventory > Add Item > Serial Numbers

#3 Inventory > Select item > Edit Item > Serial Numbers

#4 Administration > Inventory > Fill Inter-Company PO Items > Assign Serial Numbers

#5 Administration > Inventory > Search PO's > Select PO > Serial Numbers

#6 Customer > Select Customer > Sales Order OR Service Order > Serial Number Tab

- Can merge Inventory Items:
- Can Purchase Corporate Buy Items: Grants access to purchase Items that have been marked as "Corporate Buy" in the Item Profile. Items marked Corporate Buy restrictions are useful in situations where you have some employees that are only allowed to purchase small items and not big ticket items. The big ticket items would be marked as Corporate Buy items, which require this permission to purchase them. Must be used with the following security permission(s): Can Access Inventory Tree Branch, Vendor PO – Can Add.
- Can View Vendor Costs: Allows users to view vendor costs on the Inventory tab. Cost will display as $0.00 if user does not have access to view vendor cost. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Inventory Tab > Select Item

- Hazardous Materials – *Can Access Tree Branch: Grants access to the Hazardous Material Tracking Tree Branch including areas that do not require any other specific permission's in this category (listed below). The Hazardous Material Tracking tree branch will not be listed in the Administration Tab if this permission is not selected. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Print Bills of Lading *(Administration > Inventory > Hazardous Material Tracking)*

- Hazardous Materials – Can Manage Codes: Grants access to Add and Update Hazardous Material Codes. Must be used with the following security permission(s): Hazardous Materials – *Can Access Tree Branch, Can Access Inventory Tree Branch.
- Inter-Company PO – Add: Grants access to add Inter-Company Purchase Orders (ICPOs). Must be used with the following security permission(s): Inter-Company PO – Search, Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Inter-Company Purchase Orders > Add ICPO

#2 Administration > Inventory > Search Inter-Company Purchase Orders > Add New

#3 Administration > Inventory > Stock Site Replenishment Wizard

- Inter-Company PO - Close: Allows user to close Inter-Company Purchase Orders. Must be used with the following security permission(s): Inter-Company PO – Search, Can Access Inventory Tree Branch:

**Gives access to these features...

#1 Administration > Inventory > Inter-Company Purchase Orders

 - Inter-Company PO – Fill: Allows user to fill Inter-Company Purchase Orders. Must be used with the following security permission(s): Inter-Company PO – Search, Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Fill Inter-Company PO Items > Assign Serial Numbers

#2 Administration > Inventory > Search Inter-Company Purchase Orders

#3 Inventory > Item > PO Button > Inter-Company Purchase Orders

#4 Inventory > Item > Customers Waiting > Inter-Company POs Tab

- Inter-Company PO - Print: Allows user to print Inter-Company Purchase Orders. Must be used with the following security permission(s): Inter-Company PO – Search, Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Inter-Company Purchase Orders

- Inter-Company PO - Receive: Allows user to receive Inter-Company Purchase Orders. Must be used with the following security permission(s): Inter-Company PO – Search, Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Inter-Company Purchase Orders > Search Inter-Company Purchase Orders

#2 Administration > Inventory > Inter-Company Purchase Orders > Receive Inter-Company PO Items

- Inter-Company PO - Receive - Partial: Allows users to receive partial quantities Inter-Company Purchase Orders. Must be used with the following security permission(s): Inter-Company PO - Receive, Inter-Company PO – Search, Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Inter-Company Purchase Orders > Receive Inter-Company Purchase Orders > Receive screen

- Inter-Company PO - Search: Grants access to the Inter-Company PO Tree Branch; and allows user to Search Inter-Company Purchase Orders. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Inter-Company Purchase Orders

- Inter-Company PO - Send: Allows user to send Inter-Company Purchase Orders. Must be used with the following security permission(s): Inter-Company PO – Search, Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Inter-Company Purchase Orders

- Inter-Company PO - Update: Grants access to update Inter-Company Purchase Orders. Must be used with the following security permission(s): Inter-Company PO – Search, Can Access Inventory Tree Branch

**Gives access to the following feature(s):

#1 Administration > Inventory > Fill Inter-Company PO Items > Assign Serial Numbers

#2 Administration > Inventory > Search Inter-Company Purchase Orders

#3 Inventory > Item > PO Button > Inter-Company Purchase Orders

- Item – Add: Grants access to add new inventory items. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Inventory > Add Item Button

#2 Administration > Inventory>Add Item

- Item – Update: Grants access to edit items in the Inventory Tree. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Inventory > Edit Item Button

- Item Class Update: Allows user to update quantity ranges for Item Class calculations. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > General Setup > Item Classes

- Kit - Add: Grants access to add Kits. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Search Kits > Add

- Kit – Update: Grants access to update existing Kits. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Search Kits > Update

#2 Inventory > Kits > Edit Item Button

- Kit – Categories: Grants access to add and update Kit Categories. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > General Setup > Kit Categories

- Manufacturer – Add: Grants access to add Manufacturers. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Search Manufacturers > Add

- Manufacturer – Update: Grants access to update Manufacturers. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Search Manufacturers > Update

- Negative Quantities - Can transact from Invoices:
- Negative Quantities - Can transact from Jobs:
- Negative Quantities - Can transact from POS:
- Physical Counts: Grants access to Physical Count and Physical Count – Scanner import utilities. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Utilities > Physical Count

#2 Administration > Inventory > Utilities > Physical Count - Scanner Import

- Pricing - Cost Change History:
- Pricing - Cost Change Utility:
- Pricing - Discount Groups – Update:
- Pricing - Price Groups - Update:
- Pricing - Retail Price Change Utility:
- Pricing - Store Price Overrides - Update:
- Process Return Pending Items:
- Product Lines - Grants access to add and update Product lines. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > General Setup > Product Lines

- Reclassify Items Utility:
- Reorder Alert Mass Add/Update Utility:
- Shipping Methods: Grants access to add and update Distribution Methods. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > General Setup > Distribution Methods

- Stock Adjustment: Allows user to perform a stock adjustment; which increases or decreases item quantity on hand. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Utilities > Stock Adjustment

#2 Inventory > Right click item

#3 Inventory > Right click Stock Site field

- Stock Site – Add: Grants access to add Stock Sites. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Utilities > General Setup > Stock Sites > Add

- Stock Site - Update: Grants access to add Stock Sites. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > General Setup > Stock Sites > Update

- Stock Transfer: Allows user to perform a Stock Transfer which moves inventory from one stock site to another stock site. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration>Inventory>Utilities>Stock Transfer

#2 Administration > Inventory > Utilities > Stock Mass Transfer

#3 Inventory > Right click Stock Site field

- Unit Cost Override:
- Units of Measure: Grants access to add and update item Units of Measure. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > General Setup > Units of Measure

- Vendor – Insurance – Can Add/Update: Grants access to add and update Vendor Insurance. Must be used with the following security permission(s): Can Access Inventory Tree Branch, Vendor – Can Search, Vendor – Can Update.

**Gives access to the following feature(s):

#1 Administration > Inventory > Search Vendors > Vendor Profile > Insurance

- Vendor PO – Add: Grants access to add Vendor Purchase Orders. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Vendor Purchase Orders > Add Vendor Purchase Order

#2 Administration > Inventory > Vendor Purchase Orders > Add Vendor Purchase Order From Reorder Alerts

#3 Administration > Inventory > Any PO Search > Options > Add

#4 Customer > Order > POs > Create Purchase Order OR Add Manual Purchase Order

#5 Customer > Orders > Right Click > Purchase Order > Add Purchase Order

#6 Administration > Inventory > Search Vendors > Purchase Orders > Add

- Vendor PO – Can Reopen Closed PO: Allows user to re-open closed Purchase Orders. Must be used with the following security permission(s): Can Access Inventory Tree Branch, Vendor POs – Can Search.

**Gives access to the following feature(s):

#1 Administration > Inventory > Vendor Purchase Orders > Search Closed POs

#2 Administration > Inventory > Search Vendors > Purchase Orders > Update > Change Status > Re-Open

- Vendor PO – Cancel: Allows user to cancel open Purchase Orders. Must be used with the following security permission(s): Can Access Inventory Tree Branch, Vendor PO – Can Search.

**Gives access to the following feature(s):

#1 Administration > Inventory > Vendor Purchase Orders

#2 Administration > Inventory > Search Vendors > Purchase Orders > Update > Change Status > Cancel

#3 Administration > Inventory > Vendor Purchase Orders > Any Search for Purchase Orders > On Order

- Vendor PO – Close: Allows user to close open Purchase Orders. Must be used with the following security permission(s): Can Access Inventory Tree Branch, Vendor PO – Can Search.

**Gives access to the following feature(s):

#1 Administration > Inventory > Vendor Purchase Orders

#2 Administration > Inventory > Vendor Purchase Orders > Search New POs > Options > Close

#3 Administration > Inventory > Vendor Purchase Orders > Search On Order POs > Options > Close

#4 Administration > Inventory > Vendor Purchase Orders > Search On Order POs By Item > Options > Close

#5 Administration > Inventory > Search Vendors > Purchase Orders > Update > Change Status > Close

- Vendor PO – Cost Change Line Item: Allows user to edit the vendor cost on purchase order line items. Must be used with the following security permission(s): When changing the Cost Line of a Line Item on a Vendor PO from the Administration Tab, this permission must be selected in conjunction with the "Can Access Inventory Tree Branch" permission. As well as with one of the following: Vendor PO – Can Search & Vendor PO – Can Update, Vendor PO – Add.

**Gives access to the following feature(s):

#1 Administration > Inventory > Vendor Purchase Orders

#2 Administration > Inventory > Search Vendors > Purchase Orders > Update

#3 Inventory > PO Button > Select PO > Go to Purchase Order

- Vendor PO – Delete Item Receipt: Allows user to delete purchase order item receipts. Must be used with the following security permission(s): Can Access INVENTORY Tree Branch, Vendor PO – Can Search, Vendor PO – Can Update.

**Gives access to the following feature(s):

#1 Administration > Inventory > Vendor Purchase Order Profile > Item Receipts

#2 Administration > Inventory > Search Vendors > Purchase Orders > Update

#3 Inventory > PO Button > Select PO > Go to Purchase Order

- Vendor PO – Place on Order: Allows user to change purchase order status to On Order. Must be used with the following security permission(s): Can Access Inventory Tree Branch, Vendor PO – Can Search.

**Gives access to the following feature(s):

#1 Administration > Inventory > Vendor Purchase Orders

#2 Administration > Inventory > Search Vendors > Purchase Orders > Update

#3 Administration > Inventory > Search Vendors > Purchase Orders > Update > Change Status > Place on Order

- Vendor PO – Print: Allows user to print Purchase Orders. Must be used with the following security permission(s): Can Access Inventory Tree Branch, Vendor PO – Can Search

**Gives access to the following feature(s):

#1 Administration > Inventory > Vendor Purchase Orders

#2 Administration > Inventory > Search Vendors > Purchase Orders > Update

#3 Administration > Inventory > Search Vendors > Purchase Orders

- Vendor PO – Receive: Allows user to receive items on Purchase Orders. Must be used with the following security permission(s): Can Access Inventory Tree Branch, Vendor PO – Can Search.

**Gives access to the following feature(s):

#1 Administration > Inventory > Vendor Purchase Orders

#2 Administration > Inventory > Vendor Purchase Orders > Search On Order PO's

#3 Administration > Inventory > Vendor Purchase Orders > Search On Order Past Due PO's

#4 Administration > Inventory > Search Vendors > Purchase Orders > Update

#5 Administration > Inventory > Vendor Purchase Orders > Receive Inventory

- Vendor PO – Receive - Manual Receipt: Allows user to receive items without creating a purchase order. Must be used with the following security permission(s): Can Access Inventory Tree Branch, Vendor PO - Receive.

**Gives access to the following feature(s):

#1 Administration > Inventory > Vendor Purchase Orders > Receive Inventory

- Vendor PO – Search: Grants access to search Vendor PO's. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Vendor Purchase Orders

- Vendor PO – Search Reorder Items: Allows user to create vendor purchase orders from reorder alerts. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Vendor Purchase Orders > Add Vendor Purchase Order From Reorder Alerts

- Vendor PO – Search ReOrder Items – Search Secondary Vendor: Allows user to create vendor purchase orders from reorder alerts using the secondary vendor filter. Must be used with the following security permission(s): Can Access Inventory Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Vendor Purchase Orders > Add Vendor Purchase Order From Reorder Alerts > Check secondary bubble.

- Vendor PO – Update - Grants access to update Vendor Purchase Orders. Must be used with the following security permission(s): Can Access Inventory Tree Branch, Vendor PO – Can Search.

**Gives access to the following feature(s):

#1 Administration > Inventory > Vendor Purchase Orders

#2 Administration > Inventory > Vendor Purchase Orders > Search New POs > Update

#3 Administration > Inventory > Vendor Purchase Orders > Search On Order POs > Update

#4 Administration > Inventory > Vendor Purchase Orders > Search On Order POs By Item > Update

#5 Administration > Inventory > Search Vendors > Purchase Orders > Update

- Vendors – Add: Grants access to add new Vendors. This permission must be selected in conjunction with Vendors – Can Search, and one of the following permissions: Can Access Inventory Tree Branch, Can Access Accounting Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Search Vendors > Add

#2 Administration > Inventory > Add Item > Add Vendor

#3 Administration > Inventory > Add Vendor Purchase Order > Add Vendor

- Vendors – Can Search - Grants access to search Vendors. Must be used with the following security permission(s): Can Access Inventory Tree Branch, Can Access Accounting Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Search Vendor

#2 Administration > Accounting > Accounts Payable > Search Vendor

- Vendors – Update: Grants access to update Vendors. Must be used with the following security permission(s): Can Access Inventory Tree Branch, Can Access Accounting Tree Branch.

**Gives access to the following feature(s):

#1 Administration > Inventory > Search Vendor

#2 Administration > Accounting > Accounts Payable > Search Vendor

Admin - Marketing

- Can Access MARKETING Tree Branch *(Administration > Marketing):* Grants access to the Marketing Tree Branch including areas that do not require any other specific permission's in this category (listed below).The Marketing Tree Branch will not be listed in the Administration Tab if this permission is not selected.
- Advertising Codes *(Administration > Marketing > Lead Acquisition > Advertising Codes):* Grants access to add and update Advertising Codes. This permission must be selected in conjunction with the "Can Access Marketing Tree Branch" permission.
- Advertising Codes – Production Schedule *(Administration > Marketing > Lead Acquisition > Production Advertising Schedule):* Allows users to add and remove Advertising Codes from the production schedule. Adding an Advertising Code to the production schedule means the Advertising Code will be available for selection when adding a new lead or interest. This permission must be selected in conjunction with the "Can Access Marketing Tree Branch" permission.
- Advertising Cost Types *(Administration > Marketing > Lead Acquisition > Advertising Cost Types):* Grants access to add and update Cost Types. This permission must be selected in conjunction with the "Can Access Marketing Tree Branch" permission.
- Campaign Streams *(Administration > Marketing > Lead Conversion > Campaign Streams):* Grants access to add and update Campaign Streams. This permission must be selected in conjunction with the "Can Access Marketing Tree Branch" permission.
- Campaign Streams – Production Schedule *(Administration > Marketing > Lead Conversion > Campaign Streams – Production Schedule):* Allows users to add or remove Campaign Streams from the production schedule. Adding a Campaign Stream to the production schedule means the Campaign Stream will be generated for leads that match the filters of the Campaign Stream. This permission must be selected in conjunction with the "Can Access Marketing Tree Branch" permission.
- Campaign Streams – Retire *(Administration > Marketing > Lead Conversion > Campaign Stream > Retire This Campaign Stream):* Grants access to retire any Campaign Stream. Retiring a Campaign Stream takes it out of production, meaning the efforts have ended and no longer exist. Action Items related to that stream will no longer be produced. This permission must be selected in conjunction with the following permissions: Can Access Marketing Tree Branch, Campaign Streams.
- Creatives *(Administration > Marketing > Creatives):* Grants access to add, update and delete Creatives. This permission must be selected in conjunction with the "Can Access Marketing Tree Branch" permission.
- Marketing Lists *(Administration > Marketing > List Generation > Marketing Lists):* Grants access to add and update Marketing Lists. This permission must be selected in conjunction with the "Can Access Marketing Tree Branch" permission.
- Marketing Lists - Execute *(Administration > Marketing > List Generation > Marketing Lists > Execute List):* Grants access to execute Marketing Lists. Lists can be output to Excel, Avery labels or Campaign Streams. This permission must be selected in conjunction with the following permissions: Can Access Marketing Tree Branch, Marketing Lists.

- Offers *(Administration > Marketing > Offers):* Grants access to add, update, activate and inactivate Offers. This permission must be selected in conjunction with the "Can Access Marketing Tree Branch" permission.
- Product Interests *(Administration > Marketing > General Setup > Interests):* Grants access to add, update, activate and inactivate Product Interests. This permission must be selected in conjunction with the "Can Access Marketing Tree Branch" permission.
- Reassign Scheduled Action Items *(Administration > Marketing > Utilities > Reassign Scheduled Action Items)* Grants access to Reassign Scheduled Action Items. This permission must be selected in conjunction with the "Can Access Marketing Tree Branch" permission.

Admin - Reports:

- Can Access REPORTS Tree Branch *(Administration > Reports):* Grants access to the Reports Tree Branch including areas that do not require any other specific permission's in this category. The Reports Tree Branch will not be listed in the Administration Tab if this permission is not selected.
- Can Access REPORTS – Accounting *(Administration > Reports > Accounting):* Grants access to all reports in the Reports > Accounting section. This permission must be selected in conjunction with the "Can Access Reports Tree Branch" permission.
- Can Access REPORTS – Executive Summary *(Administration>Reports>Executive Summary)* - Grants access to all reports in the Reports>Executive Summary section. This permission must be selected in conjunction with the "Can Access Reports Tree Branch" permission.
- Can Access REPORTS – Inventory *(Administration > Reports > Inventory):* Grants access to Inventory Reports, details specified below. This permission must be selected in conjunction with the "Can Access Reports Tree Branch" permission.
- Can Access REPORTS – Job Costing *(Administration > Reports > Job Costing):* Grants access to all reports in the Reports > Job Costing section. This permission must be selected in conjunction with the "Can Access Reports Tree Branch" permission.
- Can Access REPORTS – Marketing *(Administration > Reports > Marketing):* Grants access to all reports in the Reports > Marketing section. This permission must be selected in conjunction with the "Can Access Reports Tree Branch" permission.
- Can Access REPORTS – Sales *(Administration > Reports > Sales*): Grants access to all reports in the Reports > Sales section. This permission must be selected in conjunction with the "Can Access Reports Tree Branch" permission.
- Can Access REPORTS – Service and Delivery *(Administration > Reports > Service and Delivery):* Grants access to all reports in the Reports>Service and Delivery section. This permission must be selected in conjunction with the "Can Access Reports Tree Branch" permission.

- Report – Money Tree *(Administration > Reports > Sales > Orders and Invoices > Evosus Money Tree):* Grants access to the Evosus Money Tree report. This permission must be selected in conjunction with the following permissions: Can Access Reports Tree Branch, Can Access Reports – Sales.
- Report – Most Popular Items *(Administration >Reports > Sales > Items & Kits > Most Popular Items):* Grants access to the Most Popular Items report. This permission must be selected in conjunction with the following permissions: Can Access Reports Tree Branch, Can Access Reports – Sales.
- Report – Revenue Register *(Administration > Reports > Sales > Orders and Invoices > Revenue Register):* Grants access to the Revenue Register report. This permission must be selected in conjunction with the following permissions: Can Access Reports Tree Branch, Can Access Reports – Sales.
- Report – Sales Gross Profit Summary *(Administration > Reports > Sales > Orders and Invoices > Sales Gross Profit Summary):* Grants access to the Sales Gross Profit Summary report. This permission must be selected in conjunction with the following permissions: Can Access Reports Tree Branch, Can Access Reports – Sales.
- Report – Sales Profit Register *(Administration > Reports > Sales > Orders and Invoices > Sales Profit Register):* Grants access to the Order Profit Register. This permission must be selected in conjunction with the following permissions: Can Access Reports Tree Branch, Can Access Reports – Sales.

Admin - Sales:

- Can Access SALES Tree Branch *(Administration > Sales):* Grants access to the Sales Tree Branch including areas that do not require any other specific permission's in this category. The Sales tree branch will not be listed in the Administration Tab if this permission is not selected.
- Change Store of Sales Transaction Utility:
- Commission Periods *(Administration > Sales > Commission Tracking):* Grants access to add and update, edit and re-open Commission Periods. This permission must be selected in conjunction with "Can Access Sales Tree Branch" permission.
- Employee Commission Maintenance *(Administration > Sales > Commission Tracking > Search Commission Periods):* Grants access to edit commissions for any employee in any Commission Period. This permission must be selected in conjunction with the following permissions: Can Access Sales Tree Branch, Commission Periods.
- Employee Sales Goals Maintenance *(Administration > Sales > Sales Goals > Add Employee Sales Goal):* Grants access to search, add and update Employee Sales Goals. This permission must be selected in conjunction with "Can Access Sales Tree Branch" permission.
- Order Line Item Discount Reasons *(Administration > Sales > General Setup > Discount Reasons):* Grants access to add and update Discount Reasons. This permission must be selected in conjunction with "Can Access Sales Tree Branch" permission.
- Point Program - Can Adjust Customer Points:

- Point Program - Can Manage Customer Points:
- Point Program - Can Manage Point Program & Rewards:
- Promotions *(Administration > Sales > Sales Promotions):* Grants access to search, add and update Sales Promotions. This permission must be selected in conjunction with "Can Access Sales Tree Branch" permission.
- Store Sales Goal Maintenance *(Administration > Sales > Sales Goals > Add Store Sales Goal):* Grants access to search, add and update Store Sales Goals. This permission must be selected in conjunction with "Can Access Sales Tree Branch" permission.
- Terms and Conditions *(Administration > Sales > General Setup > Terms and Conditions):* Grants access to add and update Terms and Conditions. This permission must be selected in conjunction with "Can Access Sales Tree Branch" permission.

Admin - Service & Delivery:

- Can Access Service/Delivery Tree Branch *(Administration > Service and Delivery):* Grants access to the Service/Delivery Tree Branch including areas that do not require any other specific permission's in this category. The Service/Delivery tree branch will not be listed in the Administration Tab if this permission is not selected.
- Can Edit Completed/Canceled Scheduled Tasks: Allows user to manually update the status of a service task from Completed or Canceled to Scheduled.
- Can Manage Schedule Rules:
- RGA - Add *(Administration > Accounting > Return Goods Authorizations > Add RGA, Administration > Inventory > Return Goods Authorizations > Add RGA, Inventory > Edit Items > RGAs)* Grants access to add RGAs. This permission must be selected in conjunction with the "RGA – Search" permission unless accessing this feature from Inventory>Edit Item. To access this feature from the Administration tab, permission must be selected in conjunction with at least one of the following permissions: Can Access Accounting Tree Branch, Can Access Inventory Tree Branch.
- RGA - Cancel *(Administration > Accounting > Return Goods Authorizations > Search RGA, Administration > Inventory > Return Goods Authorizations > Search RGA):* Grants access to cancel RGAs. This permission must be selected in conjunction with the "RGA – Search" permission. To access this feature from the Administration tab, permission must be selected in conjunction with at least one of the following permissions: Can Access Accounting Tree Branch, Can Access Inventory Tree Branch.
- RGA - Close *(Administration > Accounting > Return Goods Authorizations > Search RGA, Administration > Inventory > Return Goods Authorizations > Search RGA):* Grants access to close RGAs. This permission must be selected in conjunction with the "RGA – Search" permission. To access this feature from the Administration tab, permission must be selected in conjunction with at least one of the following permissions: Can Access Accounting Tree Branch, Can Access Inventory Tree Branch.

- RGA – Price Override Line Item *(Administration > Accounting > Return Goods Authorizations > Add RGA, Administration > Inventory > Return Goods Authorizations > Add RGA, Inventory > Edit Items > RGAs):* Grants access to override cost on RGA line items. To override a line item on an existing item, you must have access to the "RGA – Update" permission. This permission must be selected in conjunction with the "RGA – Search" permission unless accessing this feature from Inventory>Edit Items. To access this feature from the Administration tab, permission must be selected in conjunction with at least one of the following permissions: Can Access Accounting Tree Branch, Can Access Inventory Tree Branch.
- RGA - Receive *(Administration > Accounting > Return Goods Authorizations > Search RGA, Administration > Inventory > Return Goods Authorizations > Search RGA):* Allows users to receive items on RGAs. This permission must be selected in conjunction with the "RGA – Search" permission. To access this feature from the Administration tab, permission must be selected in conjunction with at least one of the following permissions: Can Access Accounting Tree Branch, Can Access Inventory Tree Branch.
- RGA - Search *(Administration > Accounting > Return Goods Authorizations > Search RGA, Administration > Inventory > Return Goods Authorizations > Search RGA):* Grants access to search RGAs. This permission must be selected in conjunction with the "Can Access Service/Delivery Tree Branch" permission. To access this feature from the Administration tab, permission must be selected in conjunction with at least one of the following permissions: Can Access Accounting Tree Branch, Can Access Inventory Tree Branch.
- RGA - Send *(Administration > Accounting > Return Goods Authorizations > Search RGA, Administration > Inventory > Return Goods Authorizations > Search RGA):* Grants access to send RGAs. This permission must be selected in conjunction with the "RGA – Search" permission. To access this feature from the Administration tab, permission must be selected in conjunction with at least one of the following permissions: Can Access Accounting Tree Branch, Can Access Inventory Tree Branch.
- RGA - Update *(Administration > Accounting > Return Goods Authorizations > Search RGA):* Grants access to update RGAs. This permission must be selected in conjunction with the "RGA – Search" permission, unless accessing this feature from Inventory > Edit Item. To access this feature from the Administration tab, permission must be selected in conjunction with at least one of the following permissions: Can Access Accounting Tree Branch, Can Access Inventory Tree Branch.
- Service and Delivery – Maintain Blackout Dates *(Administration > Service and Delivery > Add Blackout):* Allows user to add or inactivate Black Out Dates from the Service Calendar or List View. This permission must be selected in conjunction with the "Can Access Service/Delivery Tree Branch" permission.
- Service and Delivery Search *(Administration > Service and Delivery > Search):* Allows user to view and update the service calendar and list views. This permission must be selected in conjunction with the "Can Access SERVICE/DELIVERY Tree Branch" permission.
- Service and Delivery Task – Can Change Status *(Administration > Service and Delivery > Search > Select a Task):* Allows user to change the status of a task. Statuses include Scheduled, Completed and Canceled. This permission must be

selected in conjunction with the "Can Access Service/Delivery Tree Branch" permission.

- Service and Delivery Types *(Administration > Service and Delivery > General Setup > Task Categories >Administration > Service and Delivery > General Setup > Task Types):* Grants access to add and update Task Categories and Task Types. This permission must be selected in conjunction with the "Can Access Service/Delivery Tree Branch" permission.
- Service and Delivery Vehicles *(Administration > Service and Delivery > General Setup > Vehicles):* Allows user to add and update vehicles. This permission must be selected in conjunction with the "Can Access Service/Delivery Tree Branch" permission.

Admin - System:

- Can Access SYSTEM Tree Branch: Grants access to the System Tree Branch including areas that do not require any other specific permission's in this category. The System Tree Branch will not be listed in the Administration Tab if this permission is not selected.
- Can Change Admin Password *(File > Reset Admin Password > Enter New Password):* Grants access to the reset the Admin log-in password without being logged in as "Admin". If you do not have permission to reset the Admin Password, the option under File will not be selectable.
- Can Change Processing Date: Grants access to change the Evosus Processing Date. Double click on the "Process Date:" in the bottom right corner of Evosus.
- Can Do Excel Export From List On Screen: Allows users to export list views directly to Excel using the export icon in the lower right corner of the grid. This feature is available on most white grids in Evosus.
- Can Manage Evosus Forms *(Administration > System > Evosus Defaults > Manage Evosus Forms):* Grants access to add and update Evosus Forms. This permission must be selected in conjunction with the "Can Access SYSTEM Tree Branch" permission.
- Customer Attribute Labels *(Administration > System > Miscellaneous > Customer Attribute Labels):* Grants access to update Customer Attribute Labels. This permission must be selected in conjunction with the "Can Access SYSTEM Tree Branch" permission. Regardless of permissions, once an attribute label has been defined and used, it cannot be changed or removed.
- Employees *(Administration > System > Employees):* Grants access to add and update Employees. This is where you define store access and ability to log in for each employee. This permission must be selected in conjunction with the "Can Access SYSTEM Tree Branch" permission.
- Employees - Security *(Administration > System > Employees > Select Employee to change > Security Tab):* Allows user to edit employee login information such as username, password, store access, security level (manager, supervisor, employee) and maximum discount. Security tab will disappear when editing employees if this permission is not turned on. This permission must be selected in conjunction with the "Can Access SYSTEM Tree Branch" and "Employees" permissions.

- Sales Transaction Attribute Labels *(Administration > System > Miscellaneous > Sales Transaction Attribute Labels):* Grants access to Update Sales Transaction Attribute Labels. This permission must be selected in conjunction with the "Can Access SYSTEM Tree Branch" permission. Regardless of permissions, once an attribute label has been defined and used, it cannot be changed or removed.
- Security – Group and Employee *(Administration > System > Security):* Allows user to assign or revoke permissions at the group or employee level, view company-wide audit log details and manage credit card encryption key rotation and data purge. Changes defined here will be immediate for the user that is logged in making the changes, but all other users must log out and log back in for the changes to take effect. This permission must be selected in conjunction with the "Can Access SYSTEM Tree Branch" permission.
- Store Stock Site Relationships *(Administration > System > Stores > Store Stock Site Relationships):* Grants access to Store Stock Site Relationship Management. This feature allows you to identify which stock site to use when delivering items on customer orders based on store, product line and distribution method. This permission must be selected in conjunction with the "Can Access SYSTEM Tree Branch" permission.
- Stores *(Administration > System > Stores > Stores):* Grants access to add and update stores, including cash drawers, logos and defaults. This permission must be selected in conjunction with the "Can Access SYSTEM Tree Branch" permission.
- System Parameters *(Administration > System > Evosus Defaults > System Parameters):* Allows user to manage company-wide system parameters. Changes defined here will be immediate for the user that is logged in, making the changes, but all other users must log out and log back in for the changes to take effect. This permission must be selected in conjunction with the "Can Access SYSTEM Tree Branch" permission.

Admin - Timecard:

- Can Access Timecard Tree Branch: Grants access to the Timecard Tree Branch including areas that do not require any other specific permission's in this category. The Timecard Tree Branch will not be listed in the Administration Tab if this permission is not selected.
- Timecard – Can Access Timecard Setup *(Administration > Timecards > General Setup):* Grants access to add, update and delete Pay Schedules, Pay Types and Workers' Compensation Categories. This permission must be selected in conjunction with the "Can Access Timecard Tree Branch" permission.
- Timecard – Can Access Timekeeper Setup *(Administration > Timecards > General Setup > Timekeeper Setup):* Allows user to set up Timekeepers. Timekeepers must be set up in order for the user to track time in Evosus Timecards. This permission must be selected in conjunction with the "Can Access Timecard Tree Branch" permission.
- Timecard – Can Allocate Jobs *(Employee > My Timecard > Administration > Timecards > Approve Timecards):* Allows users to allocate hours worked to specific jobs. User must be set up as a Timekeeper or must have permission to Approve Timecards in order to allocate time to a job.

- Timecard – Can Allocate Workers Comp *(Employee > My Timecard > Administration > Timecards > Approve Timecards):* Grants access to allocate time on a timecard at an employee timecard entry level. User must be set up as a Timekeeper or must have permission to Approve Timecards in order to allocate time to Workers Comp.
- Timecard – Can Edit Pay Rates *(Administration > Timecards > Timekeepers Setup > Pay Tab*): Allows users to add or update timekeeper pay rates. This permission must be selected in conjunction with the following permissions: Can Access Timecard Tree Branch, Can View Pay Rates.
- Timecard – Can Edit/Approve All Timecards *(Admin > Timecards > Approve Timecards)* - Grants access to edit and approve timecards. This permission must be selected in conjunction with the Can Access Timecard Tree Branch permission.
- Timecard – Can Track Time *(Employee > My Timecard):* Allows users to track time using the punch in/out feature or the My Timecard feature on the employee tab. Users must also be set up as Timekeepers with the "Is Timekeeper" checkbox checked in Timekeepers setup.
- Timecard – Can Use Quick Punch Lunch *(Employee > My Timecard > Administration > Timecards > Approve Timecards (additional permissions required):* Grants access to quick punch in/out for lunch with-in an employee timecard. Quick Punch Lunch can also be used by administrators to punch time for their employees.
- Timecard – Can View Pay Rates *(Administration > Timecards > Timekeepers Setup > Pay Tab):* Grants access to View Employee Pay Rates in Employee setup as well as reports. This permission must be selected in conjunction with the "Can Access Timecard Tree Branch" permission.
- Timecard – Can View Timecard Reports *(Administration > Timecards):* Grants access to View Timecard Related Reports. This permission must be selected in conjunction with the "Can Access Timecard Tree Branch" permission.

Budgeting:

- Can Access Budgeting Tree Branch: Grants access to the items in the Budgeting branch of the tree menu *(Administration > Accounting > Accounting Desk > Budgeting).*
- Can Add/Update Budgets: Grants access so that users can do the following:

#1 Create new budgets using the Add Budget option *(Administration > Accounting > Accounting Desk > Budgeting > Add Budget).*
#2 Create new budgets using the Add Budget button on the Budget Search screen *(Administration > Accounting > Accounting Desk > Budgeting > Search Budgets).*
#3 Update the budgets using the Update Name & Status button on the Budget Search screen *(Administration > Accounting > Accounting Desk > Budgeting > Search Budgets).*

- Can Mass Adjust Budgets: Users can use the Adjustment button on the Budget Search screen *(Administration > Accounting > Accounting Desk > Budgeting >*

Search Budgets) to increase/decrease the budget amounts on all revenue or expense GL accounts in a budget.

- Can update budget numbers: Grants access so that users can do the following:

#1 Enter budget amounts using the Edit Budget Numbers option *(Administration > Accounting > Accounting Desk > Budgeting > Edit Budget Numbers).*
#2 Enter budget amounts using the Adjustment button on the Budget Search screen *(Administration > Accounting > Accounting Desk > Budgeting > Search Budgets).*

Credit Card Processing:

- Allow Credit Card Processing Bypass: Grants access to use the Bypass button on the Process Credit Card screen. This button allows you to process credit card payments offline and/or "approve" a credit card without electronically processing that card right away. This permission only applies if you use Evosus Card Services. Gives access to the following features: Bypass button on the Process Credit Card screen. Must be used with the "Can Make Payment" permission.
- Can Add/Update Credit Card On File: Grants access to add and update customer credit cards on file. Must be used with these security permissions: Update Customers - To add or update credit card, Can View Full Credit Card Number.
- Can View Full Credit Card number: This permission does not function in the current application.

Customer Payments:

- Can Cancel Payment: Grants access to cancel/void payments on a Customer account. Payments can be canceled on open orders or invoices that have not been posted to the sub-ledger and are not included in a bank deposit.
- Can Enter Discount Given *(Payment > AR Discount):* Grants access to enter discounts into the AR Discount column located in the payment screen. If you do not have this permission you will not be able to save the payment. This permission must be selected in conjunction with the following permissions: Can Make Payment, Update Customer.
- Can Enter Finance Fee *(Customer > Payments/Refunds > Payment > Administration > Accounting > Accounts Receivable > Receive Customer Payment):* Grants access to apply finance fees when accepting payment on customer invoices. This option can be found under the "Apply Discounts" button in the customer payment screen. This permission must be selected in conjunction with the following permissions: Can Make Payment, Update Customer.
- Can Give Refund *(Customer > Payment/Refund > Refund):* Permission allows user to issue refunds on customer accounts. This permission must be selected in conjunction with the Update Customer permission, *(located in the Customer, Security Category).*

- Can Make Payment - Permission allows users to make payments on customer accounts. This permission must be selected in conjunction with the Update Customer permission, (located in the Customer, Security Category).
- Can Reprint Credit Card Receipt – Merchant Copy *(Customer Profile > Payments/Refunds > Options > Print Receipt > Card – Merchant Copy):* Allows users to reprint the merchant copy of a credit card receipt. The merchant copy displays the full credit card number. This permission must be selected in conjunction with the Update Customer permission, *(located in the Customer, Security Category).*

Customers:

- Add New Customers *(Customers > Add Lead or Customer):* Grants access to add new leads or customers to the database.
- Alternate Names *(Customers > Customer Profile > More Options > Alt Names):* Grants access to add and update Alternate Names. Alternate names are used to add additional names to a customer account which will make it easier to locate an account attached to multiple people. This permission must be selected in conjunction with the "Update Customer" permission.
- Can Activate *(Customers > Customer Profile > Profile > Active Check Box):* Allows users to activate an inactive customer. This permission must be selected in conjunction with the "Update Customer" permission.
- Can Add Customer without Address *(Customers > Add Lead or Customer):* Allows user to add new leads or customers without entering an address, city, state or zip code. This permission must be selected in conjunction with the "Add New Customer" permission.
- Can Add Customer without Phone Number *(Customers > Add Lead or Customer):* Allows user to add new leads or customers without entering a phone number. This permission must be selected in conjunction with the "Add New Customer" permission.
- Can Bypass Duplicate on Phone/Email plus One Other Match:
- Can Change Last Name:
- Can Deactivate *(Customers > Customer Profile > Profile > Inactive Check Box):* Allows users to inactive an active customer. This permission must be selected in conjunction with the "Update Customer" permission.
- Can Set VIP Status Manually *(Customers > Customer Profile > Options > VIP Override Check Box):* Allows users to manually apply a VIP status to a customer. This permission must be selected in conjunction with the "Update Customer" permission. Reasons for VIP status could be:

#1 Active Job
#2 Active Maintenance Contract
#3 Sales over X dollars in the past X months - The amount and time frame are controlled by System Parameters. Default is $1000 and 6 months. If the customer spends more than $1000 in a 6 month time frame, then they receive VIP status.

- Credit Memo – Can Change Store *(Administration > Accounting > Accounts Receivable > Add Credit Memo):* Grants access to change the Store assigned to a credit memo. This permission must be selected in conjunction with the "Credit Memos – Can Create" permission.
- Credit Memo – Can Void *(Customers > Customer Profile > Credit Memo > Options):* Grants access to void a credit memo. This permission must be selected in conjunction with the following permissions: Update Customer, Credit Memos – Can Create. You cannot void credit memos if:

#1 It is closed
#2 Partially applied
#3 Credit memo was created through a deposit (you will need to void the payment record associated with the deposit, not the credit memo).

- Credit Memo – Lock – Can Add *(Customers > Customer Profile > Credit Memo > Locks):* Grants access to lock a credit memo to a specific transaction, such as orders, contracts or jobs. This permission must be selected in conjunction with the following permissions: Update Customer, Credit Memos – Can Create.
- Credit Memo – Lock – Can Delete *(Customers > Customer Profile > Credit Memo > Locks):* Permission allows users to delete locks on existing credit memos. Deleting the lock allows the credit memo to be applied to any transaction. This permission must be selected in conjunction with the following permissions: Update Customer, Credit Memos – Can Create.
- Credit Memo – Can Create *(Administration > Accounting > Accounts Receivable > Add Credit Memo):* Grants access to create a credit memos.
- Equipment – Can Add/Update *(Customers > Customer Profile > Equipment > Add OR Update):* Grants access to add and update Equipment on a customer profile. This permission must be selected in conjunction with the "Update Customer" permission.
- Equipment – Can/Add Update Warranties *(Customers > Customer Profile > Equipment > Add OR Update):* Grants access to add and update warranties on a customer profile. This permission must be selected in conjunction with the "Update Customer" permission.
- Interest - Update *(Customers > Customer Profile > Marketing > Add OR Update):* Grants access to add and update Marketing Interests to a customer profile. Adding and updating customer profile with new interests help track inquiries for marketing purposes. This permission must be selected in conjunction with the "Update Customer" permission.
- Lock Account From Adding Orders *(Customers > Customer Profile > Options > Lock Orders on Account):* Grants access to lock customer accounts if they are very past due. This locks the ability to create new orders as well as locking the ability to update existing orders. Return orders will not lock and quotes will not be allowed to be promoted to an order. This permission must be selected in conjunction with the "Update Customer" permission.
- Lock Sales Person to Account *(Customers > Customer Profile > Options > Lock Sales Person on Account):* Grants access to lock one sales person to a customer account. All specified order(s) created will default to the selected sales person. Further set up is necessary in System Parameters. This permission must be selected in conjunction with the "Update Customer" permission.

- Merge – Can Merge Customers *(Administration > Sales > Utilities > Customer Merge > Customers Tab > Right Click > Other Functions > Merge Customer):* Allows user to merge two customers with $0.00 balances into a single account. This permission must be selected in conjunction with one of the following permissions: Update Customer, Can Access Sales Tree Branch.
- Merge – Can Merge Customers With Balance Due *(Administration > Sales > Utilities > Customer Merge):* Allows users to merge two customers with balances into a single account. This permission must be selected in conjunction with one of the following permissions: Update Customer, Can Access Sales Tree Branch.
- Site Profiles – Can Add/Update *(Customers > Customer Profile > Site Profile > Add OR Update):* Grants access to add and update Site Profiles. This permission must be selected in conjunction with the "Update Customer" permission.
- Site Profile Visits – Can Add/Update *(Customers > Customer Profile > Site Profile > Add OR Update):* Grants access to add and update Site Profile Visits. This permission must be selected in conjunction with the following permissions: Update Customer, Site Profiles – Can Add/Update.
- Update Customer *(Customers > Customer Profile):* Grants access to update customer profile information on the following menus: Profile, Options, Contact Information, Print Invoices, Print Payment/Refund Receipts, Print Credit Memos, Print Progress Bills, Print RGA's, Activity Register, Print Site Profiles, Add/View/Rename Docs/Pics, Add/View Notes, Add Interests, Stop Campaigns, Add/Update Action Items, Add/Update Alerts, Add/Update Attributes, Enter Customer Pricing, Whiteboard, View Customer Audit Log.
- View Inactive Customers *(View > Inactive Customers):* Allows users to search including Inactive Customers by selecting this option from the View Toolbar located at the top of the screen. This permission must be selected in conjunction with the "Update Customer" permission.

Employee Search Forms:

- Can View Other Employees Data: Grants access to other employees' information in various sections of Evosus. This permission allows the user to choose a different employee or all employees from the drop down list. If you don't have the permission the list will be defaulted to the logged in user and they will be unable to select a different employee from the list.

Evosus Card Services:

- Can Access:
- Can Add/Modify Merchant Profile:
- Can Perform Card Request Status Change:
- Can Transact Off-Line (Force) Sale:

Industry Integrations:

- Can Access Industry Integrations Tree Branch: Grants access to features in the Industry Integrations Branch that do not require specific permissions. The Industry Integrations tree branch is only listed on the Administration Tab if this permission selected. This option does not give users the ability to access the General Setup folder. Gives access to the following features:

#1 Import New Inventory *(Administration > Industry Integrations > Import New Inventory)*
#2 Update Cost on Existing Inventory *(Administration > Industry Integrations > Update Cost on Existing Inventory)*
#3 Import Accounts Payable Invoices *(Administration > Industry Integrations > Import Accounts Payable Invoices)*
#4 BioGuard Transactional Data Program by Lift361
 - ALEX Pro by BioGuard, AquaTech, Arch Chemicals, Baystate, BioLab, Carecraft, Carecraft IPG, Cinderella, Crik-IT, etc.: Grants access to the integration set up screen in the General Setup folder *(Administration > Industry Integrations > General Setup).*

Job Costing:

- Can Access General Setup: Grants access to General Setup in the Job Costing tree branch. The General Setup Folder will not be listed in Job Costing if this permission is not selected. This permission must be selected in conjunction with the "Can Search" permission*. (Job Costing > General Setup).*
- Can Add: Grants access to add new Jobs. This permission must be selected in conjunction with the following permissions: Can Search, and

At least one "Job Form" permissions*. (Job Costing > Add Job).*

- Can Search: The Job Costing tree branch will not be listed in the Administration Tab if this permission is not selected. This permission must be selected in conjunction with all other Job Costing permissions. *(Administration > Job Costing).*
- Global Search - Bills: Grants access to view a list of all Job Bills. User needs the Job Bills Add/Update permission to do anything but view job bills from this main screen. *(Job Costing > Search Job Bills).*
- Global Search - Materials: Grants access to view a list of all Job Materials. This permission must be selected in conjunction with the "Can Search" permission. *(Job Costing > Search Job Materials).*
- Global Search – Revenue Recognition: Grants access to Recognize Revenue on a job. This permission must be selected in conjunction with the "Can Search" permission. This permission only allows you to view revenue recognized. To actually recognize revenue you will also need the "Can Add" permission. *(Job Costing > Search Job Materials).*

- Global Search – The Job Board: Grants access to view the Job Board sorted by phase date or phase budget. This permission must be selected in conjunction with the "Can Search" permission. *(Job Costing > Job Board).*
- Global Search – Work Orders: Grants access to all Work Orders. This permission must be selected in conjunction with the "Can Search" permission. *(Job Costing > Search Work Orders).*
- Job Bills – Can Add/Update: *(Job Costing > Search Job Bills > Search Jobs > Job Profile > Billing > Add > Search Jobs > Job Profile > Billing > Update).* Grants access to add and update Job Bills. This permission must be selected in conjunction with the following permissions: Can Search, Global Search Job Bills.
- Job Bills – Can Void *(Job Costing > Search Job Bills > Options, Search Jobs > Job Profile > Billing > Options > Void):* Grants access to add and update Job Bills. This permission must be selected in conjunction with the following permissions: Can Search, Global Search Job Bills.
- Job Cost Transfer – Can Add *(Job Costing>Job Cost Transfer):* Grants access to Transfer costs from one Job to another Job. This permission must be selected in conjunction with the "Can Search" permission.
- Job Cost Transfer – Can Reverse *(Job Costing > Job Cost Transfer > Reverse > Job Costing > Job Cost Transfer > Options > Reverse):* Grants access to Reverse Cost Transfers. This permission must be selected in conjunction with the "Can Search" permission. **NOTE for Edit Sections in this permission category: Viewing Job information and Editing Job information are very different permissions within Job Costing. In order to Edit any portion of job costing the user needs to have the "Can View" rights to the section they would like to edit as well. If they cannot view the desired information they cannot edit it.
- Job Form – Can Edit – Accounting *(Job Costing > Accounting):* Grants access to change accounting defaults within a job, such as default posting accounts and default cost types. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View - Accounting.
- Job Form – Can Edit – AP Transactions *(Job Costing > Job Search > Job > AP Transactions):* Grants access to view, add and update accounts payable within a job. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View – AP Transactions, AP – Vendor Invoice – Add, Admin-Accounting Permission Category.
- Job Form – Can Edit - Billing *(Job Costing > Job Search > Job > Billing):* Grants access to view, add and update Job Bills. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Job Bills – Can Add/Update, Can View - Billing.
- Job Form – Can Edit - Budget *(Job Costing > Job Search > Job > Budget):* Grants access to edit budget information from within a job. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View – Budget.
- Job Form – Can Edit – Change Orders *(Job Costing > Job Search > Job > Change Orders):* Grants access to add and update Change Orders. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View - Change Orders.
- Job Form – Can Edit – Cost Log *(Job Costing > Job Search > Job > Cost Log):* Grants access to use filters and text search within the Cost Log. This permission

must be selected in conjunction with the following permissions: Can Search, Can Add, Can View – Cost Log.

- Job Form – Can Edit – Job Team *(Job Costing > Job Search > Job > Job Team):* Grants access to add, update and delete members of a Job Team. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View – Job Team.
- Job Form – Can Edit - Labor *(Job Costing > Job Search > Job > Labor*): Grants access to adjust labor hours allocated to a Job. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View – Labor.
- Job Form – Can Edit – Location *(Job Costing > Job Search > Job > Location):* Grants access to add or update a Job location. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View – Location.
- Job Form – Can Edit - Materials *(Job Costing > Job Search > Job > Materials):* Grants access to add, update and delete Materials (cannot deleted delivered items). This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View – Materials.
- Job Form – Can Edit - Phases *(Job Costing > Job Search > Job > Phases):* Grants access to add and update Phases within a Job. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View – Phases.
- Job Form – Can Edit – Pics and Docs *(Job Costing > Job Search > Job > Docs/Pics):* Grants access to add, view and delete Docs/Pics. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View – Pics and Docs.
- Job Form – Can Edit - Profile *(Job Costing > Job Search > Job > Profile):* Grants access to edit Job Profile Information. All information within the profile is adjustable until the job is marked as active. Once the job is active the following fields are NOT allowed to be changed: Customer, Bid Amount. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View – Profile.
- Job Form – Can Edit - Schedule *(Job Costing > Job Search > Job > Schedule):* Grants access to add and update scheduled service tasks on a Job. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View – Schedule.
- Job Form – Can Edit – Sub-Contractors *(Job Costing > Job Search > Job > Sub-Contractors):* Grants access to add and update Sub-Contractors on a Job. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View – Sub-Contractors.
- Job Form – Can Edit - Whiteboard *(Job Costing > Job Search > Job > Whiteboard):* Grants access to make notes on the Whiteboard. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View – Whiteboard.
- Job Form – Can Edit – Work Orders *(Job Costing > Job Search > Job > Work Orders):* Grants access to add and update Work Orders. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Can View – Work Orders.
- Job Form - Can View - Accounting:

- Job Form – Can View – AP Transactions *(Job Costing > Job Search > Job > AP Transactions):* Grants access to view a lit of all accounts payable transactions applied to a Job. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Job Form – Can View - Billing *(Job Costing > Job Search > Job > Billing):* Grants access to view a list of job Bills. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Job Form – Can View - Budget *(Job Costing > Job Search > Job > Budget):* Grants access to view the Job Budget. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Job Form – Can View – Change Orders *(Job Costing > Job Search > Job > Change Orders):* Grants access to view a list of Change Orders. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Job Form - Can View - Cost Log:
- Job Form – Can View – Job Team *(Job Costing > Job Search > Job > Job Team):* Grants access to view the Job Team. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Job Form – Can View - Labor *(Job Costing > Job Search > Job > Labor):* Grants access to view a list of labor hours applied to the job. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Job Form - Can View - Location:
- Job Form – Can View - Materials *(Job Costing > Job Search > Job > Materials):* Grants access to view a list of Job Materials. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Job Form – Can View - Phases *(Job Costing > Job Search > Job > Phases):* Grants access to view Job Phases. This permission must be selected in conjunction with the following permission: Can Search, Can Add.
- Job Form – Can View – Pics and Docs *(Job Costing > Job Search > Job > Docs/Pics):* Grants access to view a list of documents and pictures that are attached to a Job. You cannot open the actual file without the Can Edit permission. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Job Form – Can View - Preview *(Job Costing > Job Search > Job > Preview):* Grants access to preview Job Information. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Job Form – Can View - Profile *(Job Costing > Job Search > Job > Profile):* Grants access to view Job Profile. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Job Form – Can View - Revenue *(Job Costing > Job Search > Job > Revenue):* Grants access to view a list of all revenue recognized to date. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Job Form – Can View - Schedule *(Job Costing > Job Search > Job > Schedule):* Grants access to view service tasks assigned to the job. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Job Form – Can View – Sub-Contractors *(Job Costing > Job Search > Job > Sub-Contractors):* Grants access to view a list of job Sub-Contractors. This

permission must be selected in conjunction with the following permissions: Can Search, Can Add.

- Job Form - Can View - Summary:
- Job Form – Can View - Whiteboard *(Job Costing > Job Search > Job > Whiteboard):* Grants access to view the Whiteboard. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Job Form – Can View – Work Orders *(Job Costing > Job Search > Job > Work Orders):* Grants access to view a list of job Work Orders. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Job Materials – Can Deliver *(Job Costing > Job Search > Job > Materials):* Grants access to deliver or un-deliver job materials. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Job Form – Can Edit – Materials, Job Form – Can View - Materials.
- Job Revenue – Can Add *(Job Costing > Job Search > Job > Revenue):* Grants access to recognize revenue for a job. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Job Form – Can View – Revenue.
- Job Revenue – Can Void *(Job Costing > Job Search > Job > Revenue > Options):* Grants access to void revenue recognition on a job. This permission must be selected in conjunction with the following permissions: Can Search, Can Add, Job Form – Can View – Revenue.
- Job Summary – Can View *(Job Costing > Job Search > Job > Summary > Job Summary):* Grants access to view the Job summary. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.
- Status – Can Close/Cancel *(Job Costing > Job Search > Job > Change Status):* Grants access to close or cancel a Job. This permission must be selected in conjunction with the following permissions: Can Search, Can Add. A Job can't be marked closed unless the following tasks are complete:

#1 All Change Orders are Executed
#2 Job is Billed in its entirety
#3 All Revenue has been Recognized

- Status – Can Make Active *(Job Costing > Job Search > Job > Change Status):* Grants access to change the status of a Job. Job Phases need to be defined before making a job active. This permission must be selected in conjunction with the following permissions: Can Search, Can Add.

Maintenance Contracts:

- Can Access Maintenance Contracts Tree Branch *(Administration > Maintenance Contracts):* The Maintenance Contract tree branch will not be listed in the Administration Tab if this permission is not selected. Grants access to the Maintenance Contracts Tree Branch including areas that do not require any other specific permission's in this category, which are listed below:

#1 Search Open Contract Orders

#2 Can Search Open Contract Invoices

#3 Search Closed Contract Invoices

- Can Add *(Administration > Maintenance Contracts > Add Contract > Customer > Contracts > Add):* Grants access to adding new maintenance contracts.
- Can Push Contract Schedule *(Administration > Maintenance Contracts > Update Contracts):* Grants access to the "Push Contract Schedule" screen while updating a contract, invoicing a customer order, right clicking from the service calendar or clicking More Options > Push Contract from the Task Update form.
- Can Search *(Administration > Maintenance Contracts > Search Contracts*): Grants access to searching maintenance contracts. This permission must be selected in conjunction with the "Can Access MAINTENANCE CONTRACTS Tree Branch" permission.
- Can Update *(Administration > Maintenance Contracts > Search Contracts > Update > Customer > Contracts > Update):* Grants access to update existing maintenance contracts. This permission must be selected in conjunction with ONE of the following permissions: Maintenance Contacts - Can Search, Customers - Update Customer.

Management Dashboard:

- Can Access Management Dashboard: This permission grants access to the dashboard.

Mobile:

- Can Access Mobile Dashboard:
- Can Edit Default Mobile Notes:
- Can Email Customer:
- Can Text Customer:
- Can View Inventory Retail price in Inventory Search:

Notes:

- Notes - Can Update: Grants access to update all notes; Customer Notes & Vendor Notes. This permission must be selected in conjunction with one of the following permissions: Update Customer, Update Vendor. *(Customers > Customer Profile > Notes > Options > Update).*

Order Queues:

- Can Create Order Queue:
- Can Update/Deactivate Queues:
- Can View Order Queues:

OpenEdge Card Services:

- Can access: User can access the OpenEdge Card Services branch in the tree menu *(Administration > Evosus Card Services by OpenEdge).*
- Can add/modify merchant profile: User can add and update the merchant profiles using the Merchants screen *(Administration > Evosus Card Services by OpenEdge > General Setup > Merchant Profiles).*
- Can perform card request status change: Users can use the Void Request button on the Card Requests Search screen *(Administration > Evosus Card Services by OpenEdge > Requests - Ready to Settle, Declined, Voided, Settled).*
- Can transact off-line (force) sale: You need to process an off-line/force transaction if either of the following is true:

#1 You are instructed to 'Call Issuer' in the response of a transaction

#2 Your internet connection is down, so processing a normal transaction is impossible.

Orders and Invoices:

- Change Item Description On Line Item Anytime: Grants access to change the description on any line item on quotes and orders. This permission must be selected in conjunction with at least one of the following permissions: Orders – Can Add Return, Orders – Can Add Sales, Orders – Can Add Service, POS – Can Add Return, POS – Can Add Sales, POS – Can Add Service, Quotes – Can Create.

(Orders OR Quotes > Items Tab > Override Description Security > Change Item Description).

- Invoice – Can Change Invoice Date: Grants access to change the invoice date on UNPOSTED invoices. This permission must be selected in conjunction with at least one of the following permissions: Orders – Status – Can Invoice Order. *(Customer > Customer Profile > Invoices > Profile).*
- Invoice - Can Modify GL Account Allocations: Grants access to change general ledger accounts on UNPOSTED invoices. This permission must be selected in conjunction with the "Update Customer" found under the Customers Security Permission Category. *(Customer > Customer Profile > Invoices > Open Invoice > Accounting Tab).*
- Invoice – Can Unapply Credit Memos: Grants access to unapply credit memo's that have been applied to invoices. This permission must be selected in conjunction with the "Update Customer" found under the Customers Security Permission Category. *(Customer > Customer Profile > Credit Memos > Open Memo > Reference Tab > Unapply Amount).*
- Invoice – Status – Can Force Close Invoice & Write Off Balance: Grants access to force close and write off invoices with a balance. This permission must be selected in conjunction with the "Update Customer" found under the Customers Security Permission Category. *(Customer > Customer Profile > Invoices > Options > Force Close (write off).*
- Invoice – Status – Can Void/Cancel POSTED: Grants access to void (cancel) any POSTED Invoice. This permission must be selected in conjunction with the "Update Customer" found under the Customers Security Permission Category. *(Customer > Customer Profile > Invoices > Options > Void (Cancel) Invoice).*
- Invoice – Status – Can Void/Cancel UNPOSTED: Grants access to void (cancel) UNPOSTED invoice. This permission must be selected in conjunction with the "Update Customer" found under the Customers Security Permission Category. *(Customer > Customer Profile > Invoices > Options > Void (Cancel) Invoice).*
- Invoice/Order – Can Change Commission Employees: Grants access to change the commissionable employee on orders and invoices. This permission must be selected in conjunction with Update Customer in the Customer Security Category as well as one or more of the following permissions: Order - Can Add Sales, Order - Can Add Return, Order - Can Add Service. *(Customer > Customer Profile > Orders > Item Tab > Commissions Button).*
- Invoice/Order – Can Change Primary Salesperson: Grants access to change the primary sales person listed on a quote, order or invoice. This permission must be selected in conjunction with Update Customer, in the Customer Security Category as well as one or more of the following permissions: Order - Can Add Sales, Order - Can Add Return, Order - Can Add Service. *(Customer > Customer Profile > Orders > Profile Tab > Primary Sales Person).*
- Invoice/Order – Can Mark Items as Delivered: Grants access to change the status of an item to delivered. This permission must be selected in conjunction with the "Update Customer" found under the Customers Security Permission Category. *(Customer > Customer Profile > Orders > Items Tab > Change Item Status > Items to Deliver Tab).*
- Invoice/Order - Can Override Delivery Date on Confirmation:
- Invoice/Order – Can Un-deliver Items: Grants access to un-deliver items. This permission must be selected in conjunction with the "Update Customer" found

under the Customers Security Permission Category. *(Customer > Customer Profile > Orders > Items Tab > Change Item Status > Delivered Items Tab).*

- Invoice/Order – Can View Profit and Cost: Grants access to view the cost and profit on any item on an Invoice or Order. *(Viewable in All Invoices and All Orders > Show Cost/Profit Button).*
- Order – Can Access The Margin Maker: Grants access to the Margin Maker on sales and service Orders. This permission must be selected in conjunction with one the following permissions: Order - Can Add Sales, Order - Can Add Return, Order - Can Add Service. *(Viewable in All Orders > Margin Maker Button In the Add Line Items Box).*
- Order – Can Add Return: Grants access to create Return Orders. *(Customer > Customer Profile > Return Order).*
- Order – Can Add Sales: Grants access to create Sales Orders. *(Customer > Customer Profile > Sales Order).*
- Order – Can Add Service: Grants access to create Service Orders. *(Customer > Customer Profile > Service Order).*
- Order – Can Assign Serial Number to Layaway: Grants access to change the status of orders with assigned serial numbers to layaway. *(Customer > Customer Profile > Service Order).*
- Order – Can Assign Serial Numbers: Grants access to assign serial numbers to an order. *(Customer > Customer Profile > Service Order).*
- Order - Can Discount Items:
- Order – Can Exceed Max Discount Set for Item: Grants access to give discounts larger than max discount limit set at the product line level. This permission must be selected in conjunction with one of the following permissions: Order - Can Add Sales , Order - Can Add Return , Order - Can Add Service. For this permission to be effective, Max Discounts must be set up at the Product Line Level. Max discount amount can be setup under *(Administration > Inventory > General Setup > Product Lines). (Customer > Customer Profile > Orders).*
- Order – Can Partially Invoice: Grants access to invoice a portion of an order. Typically this happens when you deliver items on an order at different times. This permission must be selected in conjunction with the following permission: Order Status - Can Invoice Order. *(Customer > Customer Profile >Order > Invoices > Add Invoice).*
- Order - Can Price Override Items:
- Order – Can ProRate Kit Prices**:** Grants access to change the price of kits. When adding or removing line items in a kit within the order, you have the option to have the kit price be affected by the addition or removal OR the kit price can stay the same and the price will be rolled into other items in the kit. This permission must be selected in conjunction with one of the following permissions: Order - Can Add Sales, Order - Can Add Return, Order - Can Add Service. *(Order > Add Kit > Edit Item).*
- Order – Can Transfer Order to Different Customer: Grants access to transfer an order from one customer to another customer. This permission must be selected in conjunction with one of the following permissions: Order - Can Add Sales, Order - Can Add Return, Order - Can Add Service. *(Order > Options > Transfer).*
- Order – Can Change Cost On Line Item: Grants access to change the cost of an item on an order. This permission must be selected in conjunction with one of the following permissions: Order - Can Add Sales, Order - Can Add Return, Order

- Can Add Service. You may only change the item cost on undelivered items as warranty on sales or service orders. *(Order > Items > Edit Item > Override Security – Unit Cost).*
- Order - Can Change Stock Site On Line Item: Grants access to override the stock site per line item on a sales or service order. This permission must be selected in conjunction with one of the following permissions: Order - Can Add Sales, Order
- Can Add Return, Order - Can Add Service. You may only change the stock site on undelivered items as warranty on sales or service orders. *(Order > Items > Edit Item > Stock Site).*
- Order – Sales – Can Schedule Task: Grants access to Schedule a Task on a Sales Order. The "Service" tab will not appear on a Sales Order without this permission. This permission must be selected in conjunction with one of the following permissions: Order - Can Add Sales, Order - Can Add Return, Order - Can Add Service. *(Service Order > Schedule > Add New Task).*
- Order – Service – Can Schedule Task: Grants access to schedule service or delivery tasks on a Service Order. The "Service" tab will not appear on a Service Order without this permission. This permission must be selected in conjunction with one of the following permissions: Order - Can Add Sales, Order - Can Add Return, Order - Can Add Service. *(Service Order > Schedule > Add New Task).*
- Order - Status - Can Cancel Order:
- Order - Status - Can Change Lay-Away To Order:
- Order - Status - Can Change Order To Lay-Away
- Order - Status - Can Invoice Order:
- Order – Status – Can Re-Open Closed Order: Grants access to re-open a Closed Order. This permission must be selected in conjunction with one of the following permissions: Order - Can Add Sales, Order - Can Add Return, Order - Can Add Service. *(Orders > Open closed Order > Change Order Status > Open).*
- Progress Bill – Can Add/Update: Grants access to add and update Progress Bills. *(Customer > Customer Profile > Progress Bills >Add OR Update).*
- Progress Bill – Can Void: Grants access to void unposted Progress Bills. *(Customer > Customer Profile > Progress Bills > Right click any order > Void Customer > Customer Profile > Progress Bills > Options > Void).*

Payroll:

- Payroll - Can Access Payroll Tree Branch: Grants access to the Payroll Tree Branch including areas that do not require any other specific permission's in this category (listed below). The Payroll tree branch will not be listed on the Administration tab if this permission is not selected.
- Payroll - Can Access Payroll Dashboard: Gives access to the Payroll Dashboard (Evosus Payroll Services > Payroll Dashboard). Must be used with these security permissions: Payroll - Can Access Payroll Tree Branch.
- Payroll - Can Override Last Date Imported: Gives access to the  icon so users can enable the Last Date Imported field on the Payroll Dashboard. This allows users to import payroll batches with a date prior to the last date imported. Must

be used with these security permissions: Payroll - Can Access Payroll Tree Branch, Payroll - Can Access Payroll Dashboard

- Payroll - Can Perform Payroll Setup: Gives access to the Payroll Link Setup screen, which is used to set up Evosus Payroll Services. Gives access to these features: *Evosus Payroll Services > General Setup > Payroll Setup.* Must be used with these security permissions: Payroll - Can Access Payroll Tree Branch Payroll - Can Search Master Audit Log for Payroll Entries - Makes payroll related audit log entries visible in the Master Audit Log. By default, no user has this permission. Gives access to these features: Master Audit Log *(Administration > System > Security > Master Audit Log Search), Payroll Dashboard > Audit Log tab (Administration > Evosus Payroll Services > Payroll Dashboard).* If you only have this permission, you can access the Master Audit Log if you go to *Administration > System > Security > Master Audit Log Search.* To access the Audit Log tab on the Payroll Dashboard, you also need the following permissions: Payroll - Can Access Payroll Tree Branch, Payroll - Can Access Payroll Dashboard.

Performance Analyzer:

- Can View All Employees: Grants access to view all employees in the Evosus Performance Analyzer. *(Employee > Evosus Performance Analyzer).*
- Can View All Stores: Grants access to all stores in the Evosus Performance Analyzer, even if the user cannot log into those stores. Use the Can View Own Store Graphs permission if the employee should only be able to access stores that they can log into. *(Employee > Evosus Performance Analyzer).*
- Can View Own Store Graphs: User can view the stores that they can log into. You set up which stores an employee can log into using the Employee can log into these stores field on the Employee screen *(Administration > System > Employees > Open an employee > Security tab). (Employee>Evosus Performance Analyzer).*

Point Of Sale:

- Can Access: Grants access to Point-of-Sale including areas that do not require any other specific permission's in this category. This permission must be selected in conjunction with all other Point of Sale permissions.

#1 Point of Sale
#2 Open/Close Cash Drawer
#3 My Transactions Today
#4 On Hold Trxs (Transactions)
#5 Price Check
#6 Exit POS

- Can Cancel Completed (Invoiced) POS Transaction: Grants access to cancel completed POS Transactions although, you cannot cancel POS transactions associated to a credit card payment processed through Evosus Card Services. This permission must be selected in conjunction with the following permissions: Can Access, Can Create Sale. *(Point of Sale > My Transactions Today > Cancel Transaction).*
- Can Convert to Sales Order: Grants access to convert a POS Sales transaction into a Sales or Service Order. This permission must be selected in conjunction with the one of the following combinations of permissions: Can Access, Can Create Sale, Orders - Can Add Sale and/or Orders - Can Add Service. *(Point of Sale > Sale > Convert to Order).*
- Can Create Exchange: Grants access to process Exchanges in POS. This permission must be selected in conjunction with the "Can Access" permission. *(Point of Sale > Exchange).*
- Can Create Payment on Account: Grants access to process Payments on Customer Account in POS. This permission must be selected in conjunction with the "Can Access" permission. *(Point of Sale > Customer Payment on Account).*
- Can Create Return: Grants access to process Returns from POS. This permission must be selected in conjunction with the "Can Access" permission. *(Point of Sale > Return).*
- Can Create Sale: Grants access to process Sales in POS. This permission must be selected in conjunction with the "Can Access" permission. *(Point of Sale > Sale)*
- Can Create Warehouse Order: Permission allows user to create Warehouse Orders in POS. If user does not have proper permissions, the Warehouse Order checkbox on the Payments screen will be grayed out. This is used when the customer is purchasing an item at one location but picking the item up at a different location. This permission must be selected in conjunction with the "Can Access" permission. *(Point of Sale > Sales Transaction > Payment Screen).*
- Can Discount Items: Allows user to click the Discount button or add a discount at the line item level within POS sales, returns, and exchanges. This permission must be selected in conjunction with the "Can Access" permission as well as at least one of the following: Can Create Sale, Can Create Return, Can Create Exchange. *(Point of Sale > Sale).*
- Can Do Cash Back on Checks: Grants access to give cash back on a check payment. This is applicable when the customer writes a check that exceeds the order total so they can receive cash back. This permission must be selected in conjunction with the following permissions: Can Access, Can Create Sale. *(Point of Sale > Sales Transaction > Payment Screen).*
- Can Do Petty Cash Transactions: Grants access to process Petty Cash Transactions. This permission must be selected in conjunction with the "Can Access" permissions. The ability to process Petty Cash Transactions must be granted at the cash drawer level. There is a checkbox in the cash drawer set up that must be selected to process these transactions. *(Point of Sale > Petty Cash).*
- Can Price Override Items: Grants access to change the unit price of an item in POS. This permission must be selected in conjunction with the "Can Access" permission as well as at least one of the following: Can Create Sale, Can Create Return, Can Create Exchange. *(Point of Sale > Sale > Add Items to Sale > Double click line item > Change Item Price).*

- Can See Other Employee's Transactions in same Store: Grants access to see all POS transactions within the same store, from My Transactions. This permission must be selected in conjunction with the "Can Access" permission. *(Point of Sale > My Transactions Today).*
- Close Cash Drawer: Can View Suggest Cash Amount: Grants access to view how much money should be in the cash drawer when closing based on cash transactions processed that day. This permission must be selected in conjunction with the "Can Access" permission. *(Point of Sale > Open/Close Cash Drawer > Close Cash Drawer).*

Quotes:

- Can Create - Grants access to create a customer Quote. *(Customer > Customer Profile > Quotes > Add).*
- Can Update - Grants access to update an existing Quote. *(Employees > My Quotes or Customer > Customer Profile > Quotes)* OR click thru on reports such as Quote Register.
- Discount Items:
- Price Override Items:
- Status – Can Convert to Job: Grants access to convert a Quote into a Job. This permission must be selected in conjunction with following permissions located in the Job Costing security category: Can Update, Job Costing - Can Add. *(Employees > My Quotes or Customer > Customer Profile > Quotes).*
- Status – Can Convert to Order: Grants access to convert a Quote to a sales or service order. This permission must be selected in conjunction with at least one of the following permissions located in the Orders and Invoices security category: Order - Can Add Sales, Order - Can Add Service. *(Employees > My Quotes or Customer > Customer Profile > Quotes).*
- Status – Can Expire: Grants access to manually expire a Quote before the expiration date. This permission must be selected in conjunction with the "Can Update" permission. Expiration dates can be set on Quotes. Once a Quote has passed the designated expiration date it will notify the sales person opening the Quote that it has expired although the sales person can still promote the Quote to a Sales or Service Order. The default expiration period on Quotes is set through System Parameters and is generally set for 30 days. *(Employees > My Quotes or Customer > Customer Profile > Quotes).*

Service and Delivery:

- Can Add Service Order Without Task: Grants access to add a Service Order without immediately scheduling a task. This permission must be selected in conjunction with Order – Can Add Service (located under the Orders and Invoices, Security Permissions Category).

- Can View Unscheduled Queue: Grants access to the Unscheduled Orders queue. Employees can view sales or service orders that have not yet been scheduled.
- Print Docs – Can Change Tech: Permission allows user to print documents for all technicians. Without this permission, techs can only print documents for their user.

Web API:

- Can access Web API Dashboard: This permission grants access to the Web API Dashboard *(Administration > Web API > Web API Dashboard).*