

User Manager

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The User Manager page lists existing users in a grid. There are two types of users: internal users, a company's employees, and customer users. There are switches at the upper right of the page to view inactive users or customer users. By default, the grid shows active internal users.

Each user is assigned a User Role. The User Role determines the permissions available to the user.

User Manager									
Users		Tokens		Custom User Roles		Customer Portal Users			
+ Add User		Export to Excel							
Drag a column header and drop it here to group by that column									
User Name	First Name	Last Name	Email	User Role	Access Level	Online			
bestsecurity	Thomas	Utley	tom.utley@boldgroup.com	Administrator	Admin	<input type="checkbox"/> NO	Edit	<input type="checkbox"/> NO	Edit
Debbie	Debbie	Marks	Tom.Utley@boldgroup.com	Salesperson	Admin	<input type="checkbox"/> NO	Edit	<input type="checkbox"/> NO	Edit
Natasha	Natasha	Papay	papayt@gmail.com	CustomRole		<input type="checkbox"/> NO	Edit	<input type="checkbox"/> NO	Edit
papayt@gmail.com	Travis	Papay	papayt@gmail.com	Customer		<input type="checkbox"/> NO	Edit	<input type="checkbox"/> NO	Edit
tech	Bill	Toro	papayt@gmail.com	Salesperson		<input checked="" type="checkbox"/> YES	Edit	<input checked="" type="checkbox"/> YES	Edit
rebeccadoc	Rebecca	Hall	rebecca.ann59@gmail.com	Administrator		<input checked="" type="checkbox"/> YES	Edit	<input checked="" type="checkbox"/> YES	Edit
JoshP	Josh	Patterson	joshp@perennialsoftware.com	Administrator		<input checked="" type="checkbox"/> YES	Edit	<input checked="" type="checkbox"/> YES	Edit
Jeffgaetjens	Jeff	Gaetjens	jeffg@perennialsoftware.com	Administrator		<input checked="" type="checkbox"/> YES	Edit	<input checked="" type="checkbox"/> YES	Edit
JG	Jeff	Gaetjens	jeffg@perennialsoftware.com	Salesperson		<input checked="" type="checkbox"/> YES	Edit	<input checked="" type="checkbox"/> YES	Edit
Benmist	Ben	Most	ben.most@boldgroup.com	Custom	Admin	<input type="checkbox"/> NO	Edit	<input type="checkbox"/> NO	Edit
User	Use	Er	a@email.com	Technician		<input type="checkbox"/> NO	Edit	<input type="checkbox"/> NO	Edit
Manager	Jman	Gman	jeffg@perennialsoftware.com	Manager		<input type="checkbox"/> NO	Edit	<input type="checkbox"/> NO	Edit
peterf	Peter	Fournier	peterf@perennialsoftware.com	Administrator		<input checked="" type="checkbox"/> YES	Edit	<input checked="" type="checkbox"/> YES	Edit
Custom	Custom	Custom	CustomCustomCustomCustomCustomCustomCustomCustomCustomCustom	Custom		<input type="checkbox"/> NO	Edit	<input type="checkbox"/> NO	Edit
1	2	3	4	5	6	7	8	9	10
1 - 100 of 131 items									
Refresh									

User Roles

The matrix below describes each available permission and which ones are defaulted based on the User Role.

When adding a new User, you must select a User Role. The five pre-defined User Roles are Administrator, Manager, User, Technician, and Salesperson. The pre-defined User Roles have pre-configured permissions assigned to each user role. You can set the User Role to "Custom", which allows you to configure the permissions of an individual user.

Miscellaneous

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Company Setup	Access to all company setup information	Yes				
Supervisor	Ability to see all Work Orders, Proposals, and Calendar Appointments	Yes	Yes			
User Administration	Ability to manage all Users and User Roles	Yes				

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Export	Ability to export data to Excel using the Export to Excel button on various grids	Yes	Yes			
Quick Books	Ability to export/reverse QuickBooks files	Yes	Yes			
Deliver All	Ability to deliver all invoices/credits (mark all as printed)	Yes	Yes			
Deliver	Ability to deliver individual invoices/credits (mark all as printed)	Yes	Yes	Yes		
Financial	Ability to view financial information	Yes	Yes	Yes		
Prevent Tag Creation	Prevent the user from creating Tags	Yes	Yes			
Prevent Altering Taxable Status	Prevents altering taxable status on Items and Parts	Yes				
Customer User Add	Allows the user to create customer users	Yes		Yes		

Inventory

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Inventory	Manage Items and Parts	Yes	Yes			
Quick Add	Ability to add Items and Parts on the fly on Proposals, Work Orders, Invoices, and Credits.	Yes				
Manager	Ability to manage inventory	Yes				
Read	Ability to view inventory information	Yes				
Physical	Perform a physical inventory	Yes				

Reports

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Financials		Yes	Yes			
Generals		Yes	Yes	Yes		

Invoices

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
View	View customer invoices	Yes	Yes	Yes	Yes	Yes
Add	Add customer invoices	Yes	Yes	Yes		
Edit	Edit customer invoices	Yes	Yes	Yes		
Delete	Delete customer invoices	Yes	Yes			

Credits

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
View	View customer credits	Yes	Yes	Yes		
Add	Add customer credits	Yes	Yes	Yes		
Edit	Edit customer credits	Yes	Yes	Yes		
Delete	Delete customer credits	Yes	Yes			
Apply	Apply customer credits	Yes	Yes	Yes		
Unapply	Unapply customer credits	Yes	Yes	Yes		
Approval	Approve customer credits	Yes				

Customer Manager

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
View	View customer information	Yes	Yes	Yes	Yes	Yes
Add	Add a new customer; users with this role can also reset the passwords for customer users	Yes	Yes	Yes		
Edit	Edit customer information	Yes	Yes	Yes		
Delete	Delete a customer	Yes	Yes			
View Contracts		Yes				
Add Contracts		Yes				
Edit Contracts		Yes				
Delete Contracts		Yes				
Late Fee		Yes				

Sites

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
View	View site information	Yes	Yes	Yes	Yes	Yes
Add	Add a new site	Yes	Yes	Yes		
Edit	Edit site information	Yes	Yes	Yes		
Delete	Delete a site	Yes	Yes			
Add External Link	Allows adding a link to an external site for Manitou or Stages integration	Yes				

Systems

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
View	View system information	Yes	Yes	Yes	Yes	Yes
Add	Add a new system	Yes	Yes	Yes		
Edit	Edit system information	Yes	Yes	Yes		

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Delete	Delete a system	Yes	Yes			

RMR

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
View	View RMR information	Yes	Yes	Yes	Yes	Yes
Add	Add new RMR	Yes	Yes	Yes		
Edit	Edit RMR information	Yes	Yes	Yes		
Delete	Delete RMR	Yes	Yes			
Invoice Generation	Generate Recurring Invoices	Yes	Yes			
Rate Change	Ability to use the Rate Change utility	Yes	Yes			

Documents

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Download	Download a document	Yes	Yes	Yes	Yes	Yes
Add	Add a new document	Yes	Yes	Yes	Yes	Yes
Edit	Edit an existing document	Yes	Yes	Yes	Yes	Yes
Delete	Delete an existing document	Yes	Yes	Yes	Yes	Yes

Payments

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
View	View a customer payment YES shows the Payments tab on the customer detail page and shows the Accounts Receivable > Payments menu NO hides both of these	Yes	Yes	Yes		Yes
Add	Add a new customer payment	Yes	Yes	Yes		
Edit	Edit a customer payment	Yes	Yes	Yes		
Delete	Delete a customer payment	Yes	Yes			
Submit	Ability to submit individual transactions for funding	Yes	Yes	Yes		
Submit All	Ability to submit all transactions for funding	Yes	Yes			
Refund	Create a customer refund	Yes	Yes			
Apply	Apply payments to invoices	Yes	Yes	Yes		
Unapply	Unapply payment from invoice	Yes	Yes	Yes		
Deposit	Deposit a payment batch	Yes	Yes	Yes		

Payment Methods

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Payment Method Add	Ability to add credit cards/eChecks	Yes	Yes	Yes	Yes	Yes
Payment Method Edit	Ability to edit credit cards/eChecks	Yes	Yes	Yes	Yes	Yes
Payment Method Delete	Delete an existing document	Yes	Yes			

Work Orders

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
View	View Work Order information	Yes	Yes	Yes	Yes	Yes
Add	Add a new Work Order	Yes	Yes	Yes	Yrs	
Edit	Edit Work Order information	Yes	Yes	Yes	Yes	
Delete	Delete a Work Order	Yes	Yes			
Hide Pricing	Hide pricing information on Work Orders	Yes				
Prevent Completion	Prevent a user from completing Work Orders	Yes				
Hide Cost	Hide cost information on Work Orders	Yes				
Parts View		Yes				
Parts Add		Yes				
Parts Edit		Yes				
Parts Hide Cost		Yes				
Timesheets View		Yes				
Timesheets Add		Yes				
Timesheets Edit		Yes				
Timesheets Hide Labor Rate		Yes				
Timesheets Uploader		Yes				
Commission View		Yes				
Commission Edit		Yes				
Progress Invoice View		Yes				

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Progress Invoice Create		Yes				
Change Order View		Yes				
Change Order Create		Yes				
Change Order Edit		Yes				
Change Order Delete		Yes				
Job Costing Edit		Yes	Yes			

Proposals

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
View		Yes	Yes	Yes		Yes
Add		Yes	Yes	Yes		Yes
Edit		Yes	Yes	Yes		Yes
Delete		Yes	Yes			
Hide Cost		Yes				
Hide Commission		Yes				
Rate Edit Restriction		Yes				

Recurring Work Orders

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
View	View Recurring Work Order info	Yes	Yes	Yes		
Add	Add a new Recurring Work Order	Yes	Yes	Yes		
Edit	Edit Recurring Work Order info	Yes	Yes	Yes		
Delete	Delete a Recurring Work Order	Yes	Yes			
Generation	Generate Recurring Work Orders	Yes	Yes			

Statements

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Statements	Ability to generate customer statements	Yes	Yes			

Employees

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
View	View Employee setup record	Yes	Yes			
Add	Add a new Employee record	Yes	Yes			
Edit	Edit an Employee record	Yes	Yes			
Delete	Delete an Employee record	Yes	Yes			
Dropdown		Yes				Yes

Products

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Alarm Biller		Yes	Yes	Yes	Yes	Yes
Time Attendance		Yes	Yes	Yes	Yes	Yes
Custom Forms		Yes	Yes	Yes	Yes	Yes
Sales Automation		Yes	Yes	Yes	Yes	Yes

Time Attendance

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Pay Group Manager		Yes	Yes			
Pay Roll Export		Yes	Yes			
Employee Shift Edit		Yes				
Hide Employee Rates		Yes				

Custom Forms

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Design Form		Yes	Yrs	Yes		
Delete Form		Yes	Yes			
Interactive Form		Yes	Yes	Yes		Yes
E Forms Manager		Yes	Yes			
Send Form		Yes	Yes	Yes	Yes	Yes

Accounts Payable

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Read	Vendors, Bills, Credits, Payments, Receipts, Purchase Orders	Yes				
Add	Vendors, Bills, Credits, Payments, Receipts, Purchase Orders	Yes				
Edit	Vendors, Bills, Credits, Payments, Receipts, Purchase Orders	Yes				
Delete	Vendors, Bills, Credits, Payments, Receipts, Purchase Orders	Yes				
Purchase Orders	Ability to use purchase orders	Yes				
Accounting Periods Setup	Allows access to the Accounting Periods Setup tab	Yes				
Accounting Periods Manage	Allows access to the Accounting Periods Manage tab	Yes				

General Ledger

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
General Ledger	Access to the General Ledger	Yes				

Sales Automation

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Sales Dept Manager		Yes				
Setup Items on Fly		Yes				

Query Builders

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
View	Allow use of the Query Builder	Yes	Yes	Yes		
Saved Queries	Allow load of saved queries from the Query Builder	Yes	Yes	Yes		
Export	Yes	Yes	Yes	Yes		

Collections

Permission Name	Description	Administrator	Manager	User	Technician	Salesperson
Collections		Yes				

