



# Exigo User Permissions

v 1.0

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# USER PERMISSIONS

User Permissions found by going to Administration>>User and >>clicking on a specific user and >>selecting "Modify User Details" >>then clicking the User menu tab

## HOME

*Home will enable/disable the ability to see the Home tab and the functions within the Home screen.*

- **TODAY-** will enable/disable the ability to access the Today Icon and the associated screens/sections.
  - **Email-** will enable/ disable the user to access their Email through the today page.
  - **Online-** will enable/ disable the user to see which other users are currently logged in.
  - **Calendar-** will enable/ disable the user to have access to a window that will show a brief portion of their existing Calendar.
  - **Customer-** will enable/ disable the user to create a new customer through the Today screen.
  - **Links-** will enable/ disable the user to access their saved hyperlinks through the Today screen.
  - **Company News-** will enable/ disable the user to have access to all news broadcasts by the company to its users.
  - **Allow View Department News-** will enable/ disable the user to have access to departmental news broadcasts.
  - **Time Clock-** will enable/ disable the user to clock in.
  - **Headlines-** will enable/ disable the user to have access to a window in the Today page that contains different sections of news across the nation/ world.
- **MAIL INBOX-** will enable/ disable the user to have access to Email through their user account located as a home icon.
- **MAIL FOLDERS-** will enable/disable the user to have access to their Email folders (Inbox, Sent, Deleted, etc.)
- **ONLINE DOCUMENTS** - will enable/disable the user to have access to the Documents section
- **CALENDAR-** will enable /disable the ability to use a calendar on Exigo as well as have an icon for this feature under the Home tab.
- **CONTACTS** - Enables/disables the icon under the home tab that allows the user to store contacts.
- **TIME SHEET-** Enables/disables the user to view their clock in times for the week through the Time Sheet Icon under the Home page.
- **NOTES**
  - **Allow Edit Note** - Enables/disables the icon under the home tab that allows the user to add notes.

- **LINKS-** Enables/disables the access to the Links Icon in the Home tab that can hold fast links for that user.
- **PREFERENCES-** Enables/disables the Icon under the home page that allows the user to modify Email preferences, Email signature, Calendar options, Time Zone, and change their password.
  - **Allow User localization**
- **MY ACTIONS-** Enables/disables the Icon that allows the user to have private tickets amongst his/her Customers.
- **PASSWORD-** Enables/disables the Icon under the home tab that allows you to change your password.

## CUSTOMER

*Customer enables/disables the Customer tab functions as well as all the permissions within.*

- **CUSTOMER SEARCH-** Enables/disables the Customer Search Icon and all of the permissions within.
  - **Allow Edit Order-** Enables/disables the edit button located in the Order window for an existing order, and all the permissions within.
    - **Allow Edit Order Status-** Enables/disables the Change Status button located in the payment tab in the Edit order window.
    - **Allow Cancel Order-** Enables/disables the ability to cancel an order
    - **Allow Period Change -**
    - **Allow Modify Order Date-** Enables/disables the modify order date button located in the payment tab of the edit order window.
    - **Allow Order Type Change-** Enables /disables the edit order type button located on the payment tab in the edit order window.
    - **Allow Use Credit Requisition-**
    - **Allow Print Order-** Enables/disables the user to be able to print an order.
    - **Allow Change Is Commissionable-** Enables /disables the checkbox designating if order is Commissionable
    - **Allow Transfer Order Volume-** Enables/disables the user to transfer the order volume to a different customer ID, located on the payment tab in the edit order window.
    - **Allow Order Payment Add-** Enables/disables the user to add a payment for an existing order.
    - **Allow Order Payment Edit-** Enables/disables the user to edit a payment method on an existing order.
    - **Allow Order Payment Delete-** Enables/disables the ability to remove a payment method on an existing order.
    - **Allow Edit Accepted Orders-** Enables/disables the user to edit an order that is in accepted status.

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- **Allow Shipped Order Edit**- Enables/disables the ability to edit an order that is in shipped status.
  - **Allow Canceled Order Edit**- Enables/disables the user to edit an order that is in canceled status.
  - **Allow Printed Order Edit**- Enables/disables the ability to edit an order that is in printed status.
  - **Allow Remove All Items** - Enables/disables the ability to remove all items from an order at one time.
  - **Allow RMA** - Enables/disables the ability to use the RMA flag on an order.
  - **Allow Edit Party ID** - Enables/disables the ability to edit the PartyID on an order.
  - **Allow Order Commissions Tab** - Enables/disables the access to the Commissions tab on an order.
  - **Allow Order Payment Edit/Delete**- Enables/disables the ability for a user to edit or delete payments.
    - **Allow Modify Payment Date**- Enables/disables the ability to modify the payment date of an order
    - **Allow Non-Order Payments**- Enables/disables the ability to charge an order with no products services added
  - **Allow Change Payment Amount**- Enables/disables the user to edit the amount of money that will be paid in an order.
  - **Allow override Item Price**- Enables/disables the user to manually override the price of an item in an order.
  - **Allow Override Shipping Price**- Enables/disables the user to manually override the shipping cost in an order
  - **Allow Change Warehouse**- Enables/disables the user to change the warehouse in an order.
  - **Allow Edit Item Description**- Enables/disables the user to change the description of an item in an order.
  - **Allow Change Currency**- Enables/disables the user to be able to change the currency type for order payment.
  - **Allow Change Price Type**- Enables/disables the user to change price type of an order.
  - **Allow Override Tax**- Enables/ disable the user to manually enter tax located on the payment tab of an order.
  - **Allow Edit Customer**- Enables/disables the user to edit an existing customer's Information.
    - **Allow Modify Start Date**- Enables/disables the user to edit a customer's start date in enrollment.
    - **Allow Use GST/PST Exception**- Enables /disables the user to manually override GST/PST in an order.
    - **Allow Change Country**- Enables/disables the user to have the ability to change/choose a customer's country.
  - **Allow Add New Customer**- Enables/disables the user to create new customers, entering all needed information.

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- **Allow Use Credit Transaction**- Enables/disables the user to use unused account balance credit toward order payment
  - **Allow Use Debit Transaction**- Enables/disables the user to payoff outstanding account balances in conjunction with an order payment.
  - **Allow Change Sponsor**- Enables/disables the user to change a customer’s sponsor.
  - **Allow Owner Change**
  - **Allow Edit Customer Status**- Enables/disables the user to change a customer’s status i.e. (from active to deleted, etc.)
  - **Allow Edit Customer Type**- Enables/disables the user to change the “type” of a customer. (Distributor, retail, employee)
  - **Allow Edit Rank ID**- Enables/disables the user to change/choose the rank of a customer.
  - **Allow Order Research** - Enables/disables the ability to search the list of orders.
  - **Allow Delete Customer**- Enables/disables the ability to delete a customer.
  - **Allow Auto Order**- Enables/disables the user to have the ability to create a recurring order.
    - **Allow Suspend Auto Order Date**- Enables/disables the user to suspend a date/dates in the schedule of an active recurring order.
    - **Allow Auto Order Stop Date**- Enables/disables the user to have the ability to set a date in which the recurring order will no longer be active.
    - **Allow Edit Auto Order Frequency**- Enables/disables the user’s ability to change the amount of time between each recurring order. (monthly, weekly, bi-weekly, etc)
    - **Allow Auto Order Payment Edit**- Enables/disables the user to change the payment of an active recurring order.
    - **Allow Restore Recurring Order**- Enables/disables the user to make an auto order active again after it has been deleted/cancelled.
    - **Allow Delete Auto Order** - Enables/disables the user to delete an auto order.
    - **Allow View Auto Order**
  - **Allow Subscriptions**- Enables/disables the user to view subscription information via the link on the Customer Summary screen.
  - **Allow Point Accounts**- Enables/disables the user to view point account information via the link on the Customer Summary screen.
  - **Allow Create Order from Recurring Order**- Enables/disables the user to create a new order from the existing recurring order.
  - **Allow Move Order**- Enables/disables the user to move an order under a different customer.
  - **Allow Customer Change Log**- Enables/disables the user to view the change log.
  - **Allow Order History**- Enables/disables the user to see order history and the order history tab at the top of an order
  - **Allow Payment History**- Enables/disables access to see the customer’s Payment History.
  - **Allow Expected Payment**- Enables/disables the use of the Expected Payment feature for orders.
  - **Allow Tree View**- Enables/disables the user to view tree information for the user
  - **Allow Auto Order History**- Enables/disables the user to view the History of a recurring order by clicking the History button at the top of an existing recurring order

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- **Allow Opt in/Opt out**- Enables/disables the user to opt a customer in/out of receiving email communications.
  - **Allow Terminate Customer**- Enables/disables the user to use the Terminate customer feature
  - **Allow Point Redemption**- Enables/disables the user to use points to pay for products/services
  - **Allow Use Volume Transfer**- Enables/disables the user to transfer volume of an order to another user
  - **Allow Change Enroller**- Enables/disables the user to change the enroller of a customer.
  - **Allow Change Binary Parent**- Enables/disables the ability for a user to change the binary parent of a customer.
  - **Allow Change Matrix Parent**- Enables/disables the ability for a user to change the matrix parent of a customer.
  - **Allow Change Stack Parent** - Enables/disables the ability for a user to change the stack parent of a customer.
  - **Allow Contact Addresses On Order**-Enables/disables the ability to have a contact address on an order.
  - **Allow Replacement Order**- Enables/disables the user to place Replacement orders.
  - **Allow Delete Web Info**- Enables/disables the user to delete a customer's web info
  - **Allow Order Payment Screen**- Enables/disables the use of the Payment screen on an order.
  - **Allow View Web Info**- Enables/disables the user to view a customer's web info
  - **Allow Add/Edit/Remove Order Payment**- Enables/disables the user to add/edit or delete order payment info.
  - **Allow Deleted recurring Orders**- Enables/disables the ability to remove a recurring order.
  - **Allow Create New Order**- Enables/disables the ability to create a new order for a customer.
  - **Allow Return Order**- Enables/disables the user to refund an order.
  - **Allow Edit Customer Company**- Enables/disables the access to edit the name of a customer's company in general information window.
  - **Allow Edit Customer Name**- Enables/disables the access to changing a customer's name in general information window.
  - **Allow Edit Customer Tax ID**- Enables/disables the access to change a customer's tax ID.
  - **Allow View Merchant Account**- Enables/disables the user to view Merchant Account info.
  - **Allow Account Change Log**- Enables/disables the user to view Change Log info.
  - **Allow Modify Web Alias/ Login Name**- Enables/disables the access to change a customer's web alias.
  - **Allow View SSN**- Enables/disable the access to view a customer's social security number.
  - **Allow View Customer Site Change Log**- Enables/disables the ability for a user to view the Customer change log related to web info.
  - **Allow View Order Commissions**- Enables/disables the ability to view Commissions on an order.
  - **Allow View Commissions History**- Enables/disables the ability to view Commissions on an order.



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- **Allow View Weather**- Enables/disables the user to view the weather in the Customer's details page.
  - **Allow Delete Customer History**- Enables/disables the ability for a user to deleted Account History of a customer.
  - **Show Paid Rank**- Enables/disables the viewing of a customer's paid rank.
  - **Allow Transfer Customer Data**- Enables/disables the ability to transfer a customer's account info.
  - **Allow Branded Email Addresses**-(Currently not functioning)
  - **Allow letter History**- Enables/disables the ability for a user to view a customer's letter history info.
  - **Allow Volumes**- Enables/disables the ability for a user to view a customer's volume info.
  - **Allow Orders/ Invoices**- Enables/disables the user to have the ability to view/edit existing orders of customers.
  - **Allow Payments**- Enables/disables the user to have the ability to access previous payments made by the customer.
  - **Allow Manage Customer Codings**- Enables/disables the user to have the ability to see and edit Commission Programmed Codings.
  - **Allow User Defined**- Enables/disables the ability to create user define fields.
  - **Allow Order Payment Tab**- Enables/disables the ability to see the payment tab on an order.
  - **Allow Social Networking Info**- Enables/disables the ability to manage a customer's social network info.
  - **Allow Vendor Bills**- Enables/disables the vendor bills section.
    - **Allow New Vendor Bills**- Enables/disables the ability to create new vendor bills.
    - **Allow Edit Vendor Bills**- Enables/disables the ability to edit new vendor bills.
    - **Allow View Bill Detail**
    - **Allow Override Vendor Bill Payable Type**
  - **Allow Vendor Payments**- Enables/disables the vendor payments section.
    - **Allow New Vendor Payment**- Enables/disables the ability to create new vendor payments.
    - **Allow Edit Vendor Payment**- Enables/disables the ability to edit new vendor payments.
  - **Allow Statement Print**- Enables/disables the ability to print the statement of a customer.
  - **Allow View Password**- Enables-disables the user to have the ability to view the customer's login password.
  - **Allow Manual Authorization**- Enables/disables the ability to manually authorize payments on an order.
  - **Allow Edit Payment Card**
  - **Allow Edit Customer History**
  - **Allow Qualification Overview**
  - **Allow Email Messages** - Enables/disables the ability to edit view email messages.
  - **Allow SMS Messages** - Enables/disables the ability to edit view SMS messages.
  - **Allow Account History**

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- **Allow Documents**
  - **Allow Notes**
  - **Allow Accounting**
  - **Allow Use Tax ID**
  - **CUSTOMER CONTACT SEARCH-** Enables/disables the ability to search within a customer's contacts.
  - **INQUIRIES-** Enables/disables the ability to view inquiries.
  - **MESSAGING-** Enables/disables the ability to edit view email and SMS messages.
  - **SURVEYS**
  - **ALLOW ITEM TAX TAB**

## ACCOUNTING

*Accounting allows the user access to the accounting tab and all permissions within.*

- **ACCOUNTING OVERVIEW-**
  - **Allow Bank File-** Enables/disables the ability to view bank file information.
  - **Allow Remote Check Printing-** Enables/disables the ability to print checks remotely.
  - **Allow Vendor Bill Status Edit-** Enables/disables the ability to view the edit button for vendor bill status.
  - **Allow Vendor Bill Edit-** Enables/disables the ability to view edit vendor bills button
  - **Allow View Vendor Bill Detail-** Enables/disables the ability to view vendor bill details.
  - **Allow Create Vendor Bill-** Enables/disables the ability to create new vendor bills.
  - **Allow Hyper Wallet Batch Payout**
  - **Allow Pay Bills with Points**
- **VENDORS-** Enables/disables the user to view the Vendors Icon.
  - **Allow Edit Vendor-** Enables/disables the user to have the ability to edit a vendor's general information.
  - **Allow Add New Vendor-** Enables/disables the user to have the ability to create a new vendor.
  - **Allow Change Vendor Bill Status-** Enables/disables the ability to edit vendor bill status
  - **Allow Void Payment-** Enables/disables the ability to void vendor payments.
- **ITEMS-** Allows the user access to the Items Icon under the Accounting tab as well as the Permissions within.
  - **Allow Edit Item Group-** Enables/disables the ability to edit the group an item resides in.

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- **Allow Edit Item Code-** Enables/disables the ability for the user to edit an item's code.
  - **INVOICES-** Enables/disables the icon that will allow your
    - **Allow Customer Batch Filter** - Enables/disables a user to filter customer batch.
  - **COMMISSIONS-** Enables/disables the Commission Icons and access to permissions within.
    - **Allow Commission Preview-**
      - **Allow Commission Run Detail-** Enables/disables the user to view runs.
      - **Allow Commission Run Delete-** Enables/disables the user to delete runs.
      - **Allow Commission Run Accept-** Enables/disables the user to be able to accept a given run.
      - **Allow Commission Run UnAccept-** Enables/disables the user to have the ability to unaccept a run.
      - **Allow Period End Date Change-** Enables/disables the user to have the ability to
      - **Allow Customer Rank Overrides-** Enables/disables the user to have the ability to change a customer's rank.
      - **Allow Bonus Qualification Overrides-** Enables/disables the user to change a customer's bonus qualifications
      - **Allow Run Additional Archives-** Enables/disables access to a tool that can execute runs on archived accepted runs.
    - **COMMISSION DEVELOPMENT-** Enables/disables the view of the Commissions Dev Icon.
      - **Allow Plan Deploy Plan Live-** Pushes DEV Commission live.
  - **ORDER DEVELOPMENT-**
  - **REPORTS-** Enables/disables the user to have access to the Reports Icon located in the
    - **Allow View Product Tab-** Enables/disables the user to have the ability to see the company's Product details.
      - **Allow View Product Price List-** Enables/disables the user to view the company's product pricing list, located in the product tab in the Reports Icon.
      - **Allow View Ext Product Price List-** Enables/disables the user to view the company's extended product pricing list.
      - **Allow View Product List-** Enables/disables the user to have access to view the company's product pricing list
      - **Allow View Reorder Report-** Enables/disables the user to View Reorder reports
    - **Allow View Time Clock Tab-** Enables/disables a user to view the time clock tab.
      - **Allow View Time Card Report-** Enables/disables the user to have access to the weekly clock in report.
      - **Allow Edit Time Card-** Enables/disables the user to have the ability to edit a time card.
    - **Allow View General Ledger Tab-** Enables/disables a user to view the General Ledger tab.
      - **Allow View 1099-** Enables/disables access to view the 1099 Reports.
    - **Allow View Employees Tab-** Enables/disables a user to view the Employee tab.
      - **Allow View Employee Summary-** Enables/disables a user to view the Employee Summary Report.

- **Allow View Employee Detail**-- Enables/disables a user to view Employee details.
  - **Allow View User Permissions** - Enables/disables a user to view the user permissions section.
- **Allow View Customer Tab**- Enables/disables a user to view the customer tab.
  - **Allow View Customer List Summary** - Enables/disables a user to view the customer list.
  - **Allow View Customer List Broadcast** - Enables/disables a user to view the Employee Summary Report.
  - **Allow View Customer Summary** - Enables/disables a user to view the customer summary screen.
  - **Allow View Customer List Detail**
  - **Allow View Customer List By Age**
  - **Allow View Customer Account Summary** - Enables/disables a user to view the Customer account summary
  - **Allow View Customer Email Accounts**
- **Allow View Sales Tab** - Enables/disables a user to view the Sales tab.
  - **Allow View Item Sales Summary** - Enables/disables a user to view the Employee Summary Report
  - **Allow View Top Product Sales**- Enables/disables a user to view the Top Product Sales Report
  - **Allow View Sales By Source** - Enables/disables a user to view the Sales by Source Report
  - **Allow View Daily Cash Report** - Enables/disables a user to view the Daily Cash Report
  - **Allow View Different Billing Report** - Enables/disables a user to view the Different Billing Report
  - **Allow View Order Payment Summary** - Enables/disables a user to view the Order Payment Summary Report
  - **Allow View Item Payment Summary** - Enables/disables a user to view the Item Payment Summary Report
  - **View Daily Sales** - Enables/disables a user to view the Daily Sales Report
  - **View Daily Inventory Report** - Enables/disables a user to view the Inventory Report
- **Allow View Vendor Tab** - Enables/disables a user to view the Vendor Tab
  - **Allow View Vendor List Summary** - Enables/disables a user to view the Vendor list summary
  - **Allow View Vendor List Detail**- Enables/disables a user to view the vendor list details
- **Allow View Customer Action Tracking Tab** - Enables/disables a user to view the Action Tracking tab
  - **Allow View Customer Action Tracking** - Enables/disables a user to view the customer action tracking
  - **Allow View Customer Actionee**

- **Allow View Customer AT Summary** - Enables/disables a user to view the action tracking summary
- **Allow View Vendor Action Tracking Tab** - Enables/disables a user to view the Vendor action tracking tab.
  - **Allow View Vendor Action Tracking** - Enables/disables a user to view the action tracking Report
  - **Allow View Vendor Actionee**
  - **Allow View Vendor AT Summary** - Enables/disables a user to view the vendor action tracking report.
- **Allow View Web Stats Tab**
  - **Allow View Activity Report** - Enables/disables a user to view the Web Activity report
  - **Allow View Browser Information Report** - Enables/disables a user to view the browser info report.
  - **Allow View Requested Pages Report** - Enables/disables a user to view the requested pages report.
  - **Allow View Referrer Site Report**
  - **Allow View Location Report** - Enables/disables a user to view the Location report
- **Allow View Commission Tab** - Enables/disables a user to view the Commission tab.
  - **Allow View Commission Statements** - Enables/disables a user to view Commission statements
- **Allow View Banking Tab** - Enables/disables a user to view the Banking tab.
  - **Allow View Check Ledger** - Enables/disables a user to view the Check ledger
  - **Search Credit Card Usage**
- **Allow View Label Tab** - Enables/disables a user to view the Label tab.
  - **Allow View Customer Labels** -
  - **Allow View Vendor Labels**-
- **Allow View 1099 Forms** - Enables/disables a user to manage 1099 forms.
- **Allow Reoccurring Order List**-
- **Allow Report Builder** - Enables/disables a user to create mange reports via report builder.
- **Allow View Auto Responder Tab** - Enables/disables a user to view the Auto Responder tab
  - **Allow View Auto Responder Log** - Enables/disables a user to view the Auto Responder log.
- **Allow View Login Info Tab** - Enables/disables a user to view the Login Info Tab.
- **Allow Custom SQL Reports Tab** - Enables/disables access to the SQL Reports Tab.
- **Allow API Log Reports Tab**- Enables/disables access to API Reports log..
- **Allow Customer Portal Reports**
- **SHARED REPORTS** - Enables/disables a user to view shared reports.
- **CREDIT CARD BLACK LIST MESSAGE**- Enables/disables a user to blacklist credit cards.
- **ALLOW CUSTOM BATCH TERMINATION**-

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## ADMINISTRATION

*Administration Enables/disables the user access to the administration icon as well as the permissions within.*

- **USERS-** Enables/disables the user to have access to creating new users. As well as modifying a User's permissions.
- **SETTINGS-** Enables/disables the user to have access to the settings icon as well as the permissions within.
  - **Allow Downline Viewer Settings** - Enables/disables a user to view the Downline Viewer settings.
  - **Allow View Company Settings-** Enables/disables a user to view the Company settings Link.
  - **Allow View Accounting Settings** - Enables/disables a user to view the Accounting Settings Link.
  - **Company Calendar** - Enables/disables a user to manage the company calendar.
- **ALLOW LOCAL DATE-** Enables/disables a user to manage local date and time.
- **COMPANY NEWS-** Enables/disables the user to have the ability to be able to create a company newsletter as well as decide who is allowed to view it.
- **LETTER TEMPLATES-** Enables/disables a user to view the Letter templates.
- **MANAGE TIME CLOCK** - Enables/disables a user to view the Employee Summary Report
- **MANAGE BROADCAST** - Enables/disables a user to manage email broadcast groups and settings
- **LOGIN PROFILES** - Enables/disables a user to manage login profiles for customers.
- **DOCUMENT LIBRARY-** Enables/disables the user to have the ability to view documents that have been uploaded for the company as well as add new ones.
- **SYNC DATABASE USERS-** - Enables/disables a user to manage users for extended databases and sandboxes.
- **SECURITY TEMPLATES**
  - **Allow Security Templates by Department**
  - **Allow Change of Security Templates by Department**
- **MESSAGE OF THE DAY**
- **MARKETING WEBSITES**

## USER SECURITY SETTINGS

User Security Settings found by going to Administration>>Users and clicking on a specific user

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## “Modify User Security”

- **DOCUMENTS TAB**
  - Read Only
  - Read/Write
  - Full Access
  
- **CUSTOMER ACCESS TAB**
  - Restrict by Customer Types
  - Restrict by Customer status types
  - Restrict by Warehouse
  - Restrict by Country
  - Restrict by Currency
  
  - View Deleted Customers
  - Do not allow User to View Payment Screen
  - Do Not Allow Drop Ship Address
  
  - Restrict Vendor Types
  
- **ORDER ACCESS TAB**
  - Restrict Expected Payment Status Types
    - Expected
    - Confirmed
    - Cancelled
  - Restrict Expected Payment Types
    - Bank Wire
    - COD
  
- **LETTER TEMPLATES TAB**
  
- **IP RESTRICTIONS TAB**
  - Override Client IP Check
  
- **TOOL ACCESS TAB**
  - Allow Visual Studio Commission Plan Access
  - Allow Visual Studio Order Plan Access
  - Allow Portal Access
  - Allow Extended DB Access
  - Allow Portal Accounting

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- Allow Sandbox Management
  - Allow Sync Management