



Setup

System information

System tools

Users & Groups

- Users
- New user
- Groups
- New group

Bookmarks

- Sto Corp

User | User card | **User permissions** | User display setup | Note | Log

Ref. 6

Last name [Redacted]

First name [Redacted]

★ Only permissions related to activated modules are shown here. You can activate other modules in the Home->Setup->Modules page.

Module		Permissions
Agenda	All/None	
Agenda	- ✓	Read actions (events or tasks) linked to his account
Agenda	+	Create/modify actions (events or tasks) linked to his account
Agenda	+	Delete actions (events or tasks) linked to his account
Agenda	+	Read actions (events or tasks) of others
Agenda	+	Create/modify actions (events or tasks) of others
Agenda	+	Delete actions (events or tasks) of others
Banks and cash	All/None	
Banks and cash	+	Read financial accounts
Banks and cash	+	Create/modify/delete and compare transactions
Banks and cash	+	Setup financial accounts (create, manage categories)
Banks and cash	+	Consolidate transactions
Banks and cash	+	Export transactions and account statements
Banks and cash	+	Transfers between accounts
Banks and cash	+	Manage cheques dispatching
Bookmarks	All/None	
Bookmarks	- ✓	Read bookmarks
Bookmarks	- ✓	Create/modify bookmarks
Bookmarks	- ✓	Delete bookmarks
Categories	All/None	
Categories	- ✓	Read categories
Categories	+	Create/modify categories
Categories	+	Delete categories
Customer Orders	All/None	
Customer Orders	- ✓	Read customers orders
Customer Orders	+	Create/modify customers orders
Customer Orders	+	Validate customers orders
Customer Orders	+	Close customers orders
Customer Orders	+	Cancel customers orders
Customer Orders	+	Delete customers orders
Customer Orders	+	Export customer orders and attributes
Accounting	All/None	
Accounting	- ✓	Read reports
Accounting	+	Setup dispatching
Accounting	- ✓	Read invoice accountancy dispatching
Accounting	+	Dispatch invoice's accountancy lines
Contracts	All/None	
Contracts	- ✓	Read contracts
Contracts	+	Create/modify contracts
Contracts	+	Activate a service of a contract
Contracts	+	Disable a service of a contract
Contracts	+	Delete contracts
Expenses and trips notes	All/None	

	Expenses and trips notes	-	✓	Read trips
	Expenses and trips notes	+		Create/modify trips
	Expenses and trips notes	+		Delete trips
	Expenses and trips notes	+		Export trips
	Electronic Content Management	All/None		
	Electronic Content Management	-	✓	Read/Download documents
	Electronic Content Management	-	✓	Submit or delete documents
	Electronic Content Management	-	✓	Setup documents directories
	Shipments	All/None		
	Shipments	-	✓	Read sendings
	Shipments	+		Create/modify sendings
	Shipments	+		Validate sendings
	Shipments	+		Delete sendings
	Shipments	-	✓	Read delivery orders
	Shipments	+		Create/modify delivery orders
	Shipments	+		Validate delivery orders
	Shipments	+		Delete delivery orders
	Data exports	All/None		
	Data exports	+		Get result of an export
	Data exports	+		Create/Modify an export
	Invoices	All/None		
	Invoices	-	✓	Read customer invoices
	Invoices	+		Create/modify customer invoices
	Invoices	+		Validate customer invoices
	Invoices	+		Create payments for customer invoices
	Invoices	+		Delete customer invoices
	Invoices	+		Export customer invoices, attributes and payments
	Interventions	All/None		
	Interventions	-	✓	Read interventions
	Interventions	+		Create/modify interventions
	Interventions	+		Delete interventions
	Interventions	+		Export interventions
	Suppliers	All/None		
	Suppliers	-	✓	Read suppliers
	Suppliers	-	✓	Read supplier orders
	Suppliers	+		Create/modify supplier orders
	Suppliers	+		Validate supplier orders
	Suppliers	+		Approve supplier orders
	Suppliers	+		Order supplier orders
	Suppliers	+		Acknowledge receipt of supplier orders
	Suppliers	+		Delete supplier orders
	Suppliers	-	✓	Read supplier invoices
	Suppliers	+		Create/modify supplier invoices
	Suppliers	+		Validate supplier invoices
	Suppliers	+		Delete supplier invoices
	Suppliers	+		Export supplier invoices, attributes and payments
	Data imports	All/None		
	Data imports	+		Run mass imports of external data into database (data load)
	Mass E-mailings	All/None		
	Mass E-mailings	-	✓	Read emailings
	Mass E-mailings	+		Create/modify emailings (topic, recipients...)
	Mass E-mailings	+		Validate emailings (allows sending)
	Mass E-mailings	+		Delete emailings
	Standing orders	All/None		
	Standing orders	-	✓	Read standing orders
	Standing orders	+		Create/modify a standing orders request
	Standing orders	+		Read standing orders receipts
	Standing orders	+		Credit/refuse standing orders receipts

Products	All/None	
Products	+	Read products
Products	+	Create/modify products
Products	+	Delete products
Products	+	Export products
Projects	All/None	
Projects	-	✓ Read projects (shared project and projects i'm contact for)
Projects	-	✓ Create/modify projects (shared project and projects i'm contact for)
Projects	-	✓ Delete projects (shared project and projects i'm contact for)
Projects	+	Read projects (also private i am not contact for)
Projects	+	Create/modify projects (also private i am not contact for)
Projects	+	Delete projects (also private i am not contact for)
Proposals	All/None	
Proposals	-	✓ Read commercial proposals
Proposals	+	Create/modify commercial proposals
Proposals	+	Validate commercial proposals
Proposals	+	Close commercial proposals
Proposals	+	Delete commercial proposals
Proposals	+	Export commercial proposals
Services	All/None	
Services	+	Read services
Services	+	Create/modify services
Services	+	Delete services
Services	+	Export services
Third parties	All/None	
Third parties	-	✓ Read third parties linked to user
Third parties	+	Create/modify third parties linked to user
Third parties	+	Delete third parties linked to user
Third parties	+	Export third parties
Third parties	-	✓ Extend access to all third parties (not only those linked to user). Not effective for external users (always limited to themselves).
Third parties	-	✓ Read contacts
Third parties	+	Create/modify contacts
Third parties	+	Delete contacts
Third parties	+	Export contacts
Taxes, social contributions and dividends	All/None	
Taxes, social contributions and dividends	+	Read social contributions and vat
Taxes, social contributions and dividends	+	Create/modify social contributions and vat
Taxes, social contributions and dividends	+	Delete social contributions and vat
Taxes, social contributions and dividends	+	Export social contributions
Users & groups	All/None	
Users & groups	+	Read other users and groups
Users & groups	+	Create/modify other users, groups and permissions
Users & groups	+	Modify other users password
Users & groups	+	Delete or disable other users
Users & groups	-	✓ Create/modify his own user information
Users & groups	-	✓ Modify his own password
Users & groups	+	Export users