



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	Craig
First name	Renfrow

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

Module		Permissions
Agenda	<b>All/None</b>	
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	<b>All/None</b>	
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	<b>All/None</b>	
Bookmarks	- ✓	Read bookmarks
Bookmarks	- ✓	Create/modify bookmarks
Bookmarks	- ✓	Delete bookmarks
Categories	<b>All/None</b>	
Categories	- ✓	Read categories
Categories	+	Create/modify categories
Categories	+	Delete categories
Customer Orders	<b>All/None</b>	
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	<b>All/None</b>	
Accounting	- ✓	Read reports
Accounting	+	Setup dispatching
Accounting	- ✓	Read invoice accountancy dispatching
Accounting	+	Dispatch invoice's accountancy lines
Contracts	<b>All/None</b>	
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	<b>All/None</b>	

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	<b>All/None</b>		
Electronic Content Management	-		Read/Download documents
Electronic Content Management	-		Submit or delete documents
Electronic Content Management	-		Setup documents directories
Shipments	<b>All/None</b>		
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	<b>All/None</b>		
Data exports	+		Get result of an export
Data exports	+		Create/Modify an export
Invoices	<b>All/None</b>		
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	<b>All/None</b>		
Interventions	-		Read interventions
Interventions	+		Create/modify interventions
Interventions	+		Delete interventions
Interventions	+		Export interventions
Suppliers	<b>All/None</b>		
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	<b>All/None</b>		
Data imports	+		Run mass imports of external data into database (data load)
Mass E-mailings	<b>All/None</b>		
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	<b>All/None</b>		
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	<b>All/None</b>	
Products	+	Read products
Products	+	Create/modify products
Products	+	Delete products
Products	+	Export products
Projects	<b>All/None</b>	
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	<b>All/None</b>	
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	<b>All/None</b>	
Services	+	Read services
Services	+	Create/modify services
Services	+	Delete services
Services	+	Export services
Third parties	<b>All/None</b>	
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	<b>All/None</b>	
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	<b>All/None</b>	
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