Employee Levels

There are 6 levels of access an employee can have. An employee's level defines the access and actions they can perform. Use the charts and descriptions below to decide what level each of your employees should be.

Standard Access Chart:

Access / Level	Production	Sales Clerk	Store Manager	Accounting	Sr Manager	Admin
Accounting				✓	✓	✓
Admin Panel				✓	✓	✓
Admin Tab (Customer)			✓	✓	✓	✓
Alter & Repair	✓	✓	✓	✓	✓	✓
Assembly	✓	✓	✓	✓	✓	✓
Customer		✓	✓	✓	✓	✓
Delivery		✓	✓	✓	✓	✓
Employee			✓	✓	✓	✓
Folding & Bagging	✓	✓	✓	✓	✓	✓
KPI screen	✓	✓	✓	✓	✓	✓
Payroll			✓	✓	✓	✓
Performance	✓	✓	✓	✓	✓	✓
Pressing	✓	✓	✓	✓	✓	✓
Production		✓	✓	✓	✓	✓
Promotions				✓	✓	✓
Racking	✓	✓	✓	✓	✓	✓
Remote Access Toggle			✓	✓	✓	✓
Route Manager			✓	✓	✓	✓
Search		✓	✓	✓	✓	✓
Spotting	✓	✓	✓	✓	✓	✓
Storage	✓	✓	✓	✓	✓	✓
Tech Support		✓	✓	✓	✓	✓
Timeclock	✓	✓	✓	✓	✓	✓
Wash & Fold	✓	✓	✓	✓	✓	✓

Actions Chart:

Actions / Level	Sales Clerk	Store Manager	Accounting	Sr Manager	Admin
Access a Customer's Website					✔
Add a Credit	✔	✔	✔	✔	✔
Apply Restricted Promotion		✔	✔	✔	✔
Change a Payment Account			✔	✔	✔
Change a Sale Agent			✔	✔	✔
Create / Edit an Employee			✔	✔	✔
Create a Group		✔	✔	✔	✔
Edit Customer Prices		✔	✔	✔	✔
Edit Time Clock			✔	✔	✔
Force Finish an Order		✔	✔	✔	✔
Pay a Claim		✔	✔	✔	✔
Remove from A/R			✔	✔	✔
Reset an Order		✔	✔	✔	✔
Void a Claim		✔	✔	✔	✔
Void a Payment		✔	✔	✔	✔

Admin Access Chart:

Admin Section / Level	Accounting	Sr Manager	Admin
Assembly		✔	✔
Business			✔
Database			✔
Delivery		✔	✔
Detailing / Pricing		✔	✔
Financials	✔	✔	✔
Items	✔	✔	✔
Orders	✔	✔	✔
Production	✔	✔	✔
Stations		✔	✔
Storage		✔	✔

Each level is explained below and accompanied by a screenshot of what that level's home page looks like, starting with the lowest level of access:

1. Production:

Production is limited to only the basic production modules. This level is only for employees who will strictly be using the production modules and clocking in. If you want any of your production employees to be able to open customer accounts set them to Sales Clerk, as the Production level doesn't have access to customers.
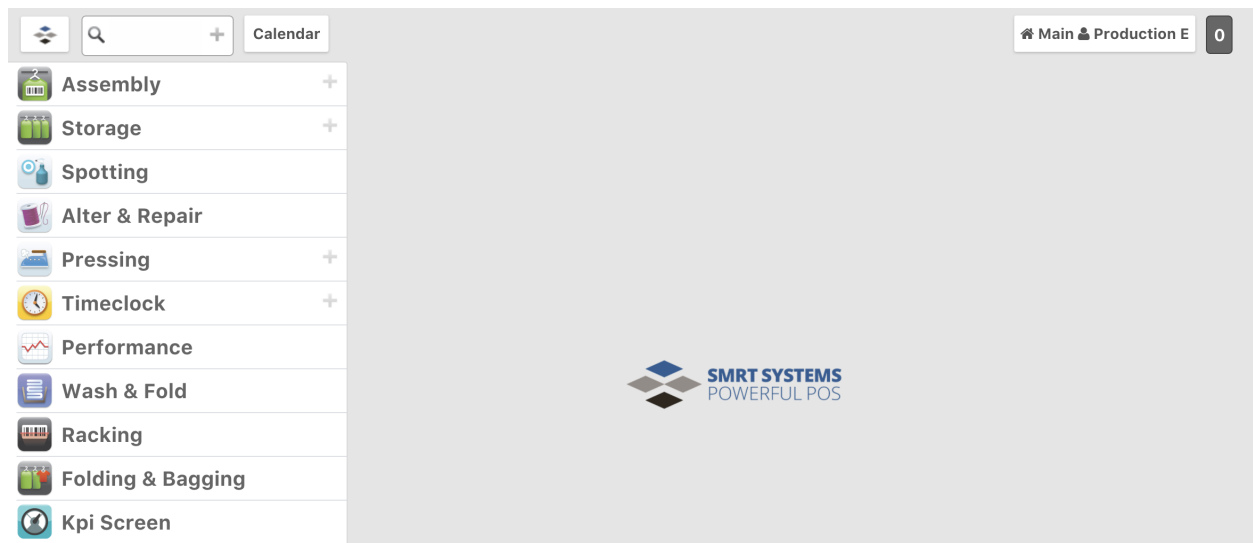
2. Sales Clerk:

Sales Clerks can see the Customer and Delivery modules in addition to all the modules the Production level can see. This level is most commonly used for Drivers, Sales Clerks, Tailors, and Production related employees that need to access customer accounts.
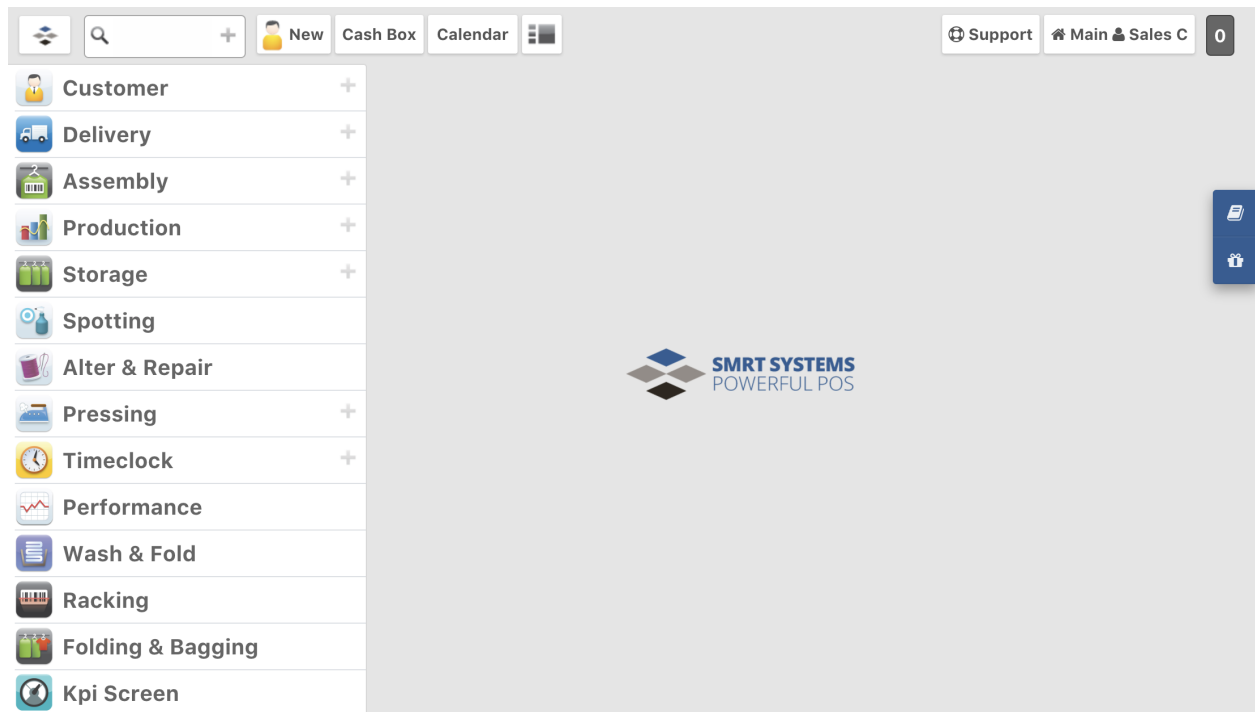
3. Store Manager:

Store Managers have significantly more access when it comes to customers. They have
access to a customer's Admin settings, can Void Payments and Pay Claims, reset orders,
force orders into A/R, and can edit customer prices. They can also be given Remote
Access so that they can log in from a personal computer.
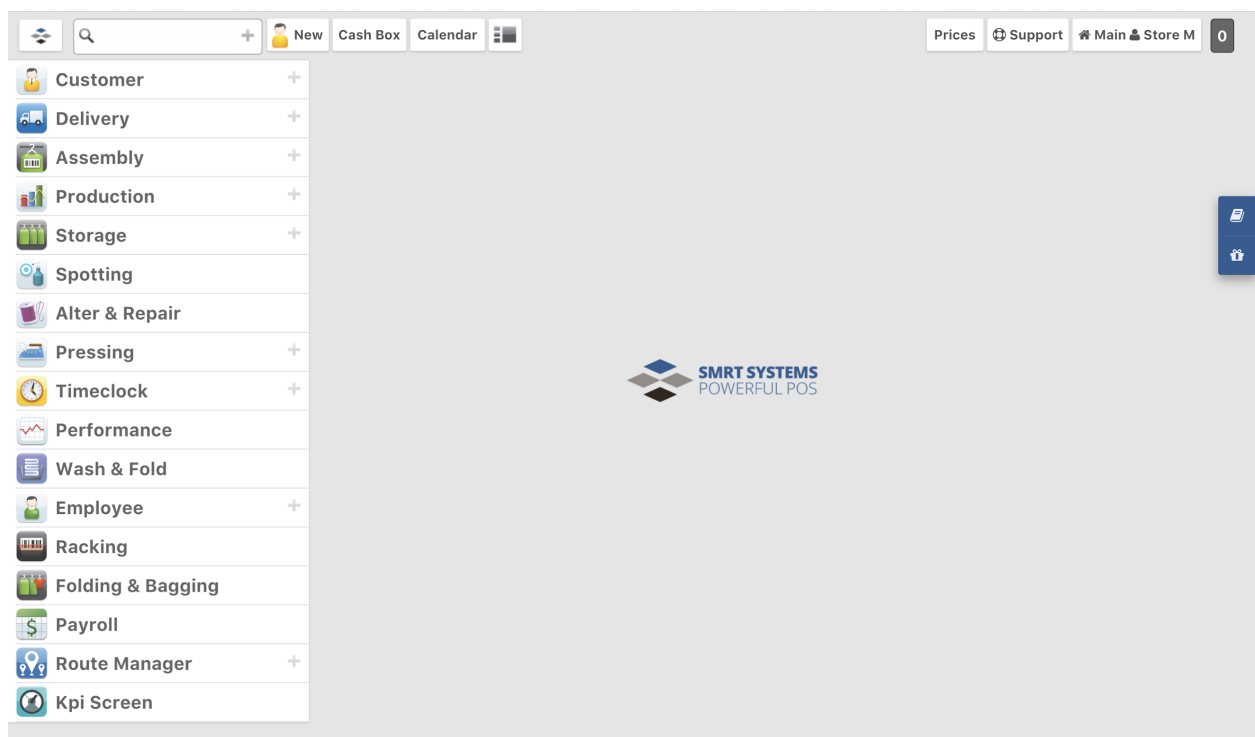
4. Accounting:

The Accounting level has access to all customer, employee, production, financial reports, and the Admin Panel. They can also create promotions, change the sales agent or payment account of an order, create and edit employees, and edit time clocks.
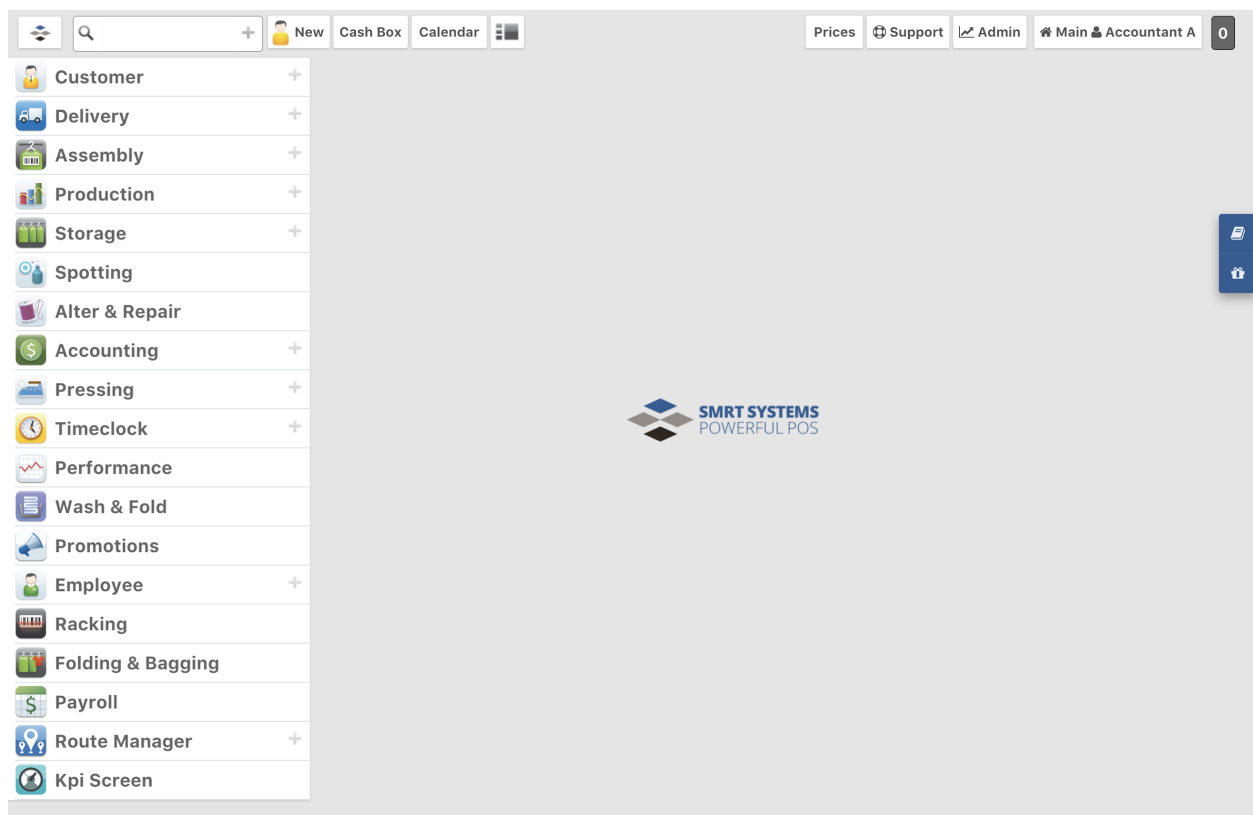
*Same Home Page for Sr Managers and Admins

<u>5. Sr Manager:</u>

Sr Managers have the same front end access as the Accounting level. The few differences are that they have access to system configuration in the Admin Panel and can create and edit Accounting level employees.

<u>6. Admin:</u>

Admins have access to everything including the few things Sr Managers don't; MID Configuration, the customer Database, and can see all Support tickets submitted by their employees.