



Thank you for your interest in adilas.biz Below is a list of system permissions that are available for use by you and your employees. Many of the permissions listed below are only permission gateways to the main business functions listed. Once you get into that section within the site, additional options, reports, and features are available. Each user within the system may be set up with a custom number of permissions to match their clearance status and job specific tasks. All user permissions can be turned on/off at the click of a button. All permissions not assigned to a user will be completely hidden providing a custom look and feel for each individual.

Color Code Legend

- all
 - sales
 - manager
 - account/admin
 - corp admin
 - specialty (silver)

System Search

Stock/Unit - Full:	This permission has two functions. First, it allows a user to search for a unit or stock number from the main homepage. Second, it allows the user to view all of the numbers, ages, details, profits, base price, etc. This is an admin level for stock numbers. The non-admin level is the "Stock/Unit-Cust" permission listed below.
Stock/Unit - Cust:	<p>This permission has two functions. First, it allows a user to look up a unit by stock number from the homepage. Second, this permission only shows customer friendly information for the unit when viewing the unit details. All numbers, base price, dates, age, and profit are hidden. This is a great permission for salespersons, who need access to the unit numbers, yet it still hides important data from the customers if they are looking over a salesperson's shoulder.</p> <p>This permission is also used to show photos for units. The permission is setup to be self-contained for salespersons or used in conjunction with the "Unit-Full" permission (unit admin).</p>
Part:	This permission will add a parts search field to the main homepage. The part search will allow a 4-way quick search of the main part number, barcode number, part reference, and part description. The user also needs "Add/Edit Customer" permission and the main "Parts & General Inventory" permission in order to sell anything out of the system.
P.O.:	This permission is for a PO search field from the main homepage. The user also needs the "Basic PO's" permission in order to add/edit or view PO's.
Invoice:	This permission is for a invoice search field from the main homepage. The user also needs the "Basic Invoices" permission in order to add/edit or view invoices.
Expense/Receipt:	This permission is for an expense/receipt search field from the main homepage. The user also needs the "Basic Expense/Receipts" permission in order to add/edit or view expenses.
Deposit:	This permission is for a deposit search field from the main homepage. The user also needs the "Basic Deposits" permission in order to add/edit or view deposits.
Quote:	This permission is for a quote search field from the main homepage. The user also needs the "My Quotes" permission in order to add/edit or view quotes. The user should also have all other permissions that allow them to use the shopping cart which are customers, and parts permissions. All shopping carts may be saved as quotes as often as needed. There are also features to restore a quote to an active shopping cart.
Check:	This permission allows a user to search for a check number from the main homepage. The user also needs the "Basic Expense/Receipts" permission to view check search results.

Recipe/Build:	This permission allows the user to search for a recipe/build from the main homepage. A recipe is a preset group (kit, package deal, options, etc.) of items or ingredients. The build part is how and when it gets used in creating invoices and/or doing actual manufacturing.
Flex Grid:	This permission allows the user to search the 10 x 10 x 10 flex grid application tie-ins. The main permission is the "Add/Edit Flex Grid" permission under system maintenance. This permission will add a flex grid quick search option from the main homepage.
Balance Sheet Item:	This permission allows a user to search for user-maintained balance sheet items from the main homepage as a quick search. The user will also need the basic balance sheet permission under system reports in order to get full use out of this permission. This permission is admin and/or an accounting level permission.
Vendor:	This permission allows a user to search by a vendor business name from the main homepage. Once results are displayed, the user will have options of creating PO's, check requests, and basic expense/receipts using the vendor.
VIN/Serial Num:	This permission allows a VIN number or serial number search from the main homepage. VIN/Serial numbers are attached to all stock/units in the system. The results will be shown with links going to the main unit detail page.
Customer Biz-Name:	This allows a user to search by a customer's business name from the main homepage. The user should also have the main "Add/Edit Customers" permission which is also the main sales permission for the application.
Customer L-Name:	This allows a user to search by a customer's last name from the main homepage. The user should also have the main "Add/Edit Customers" permission which is also the main sales permission for the application.

System Basics

New Cart (Invoice):	This permission will show a quick link to start a new shopping cart from the homepage. Shopping carts help to create both quotes and actual invoices. This permission is just a short-cut link to start a new cart.
Customer Logs:	This permission provides a quick link to the search user-maintained customer logs section. Customer logs are part of the customer relationship management (CRM) functionality of the adilas.biz application. Logs include contact type, date/time stamps, follow-up options, and notes. All fields are searchable.
My Quotes:	This permission has two functions. First, it adds a quick link to the main homepage for quick access to the user's quotes. Second, it is a mini version of the "Basic Quotes" permission. If coupled with the "Basic Quotes" permission, this is a quick link to quotes that were created by the user. If it is used as a standalone feature, it allows the user to quote and have full access to all carts and quotes but will be limited to just what the specific user has created. This is a great way to allow someone the option of quoting but he/she won't be able to see and/or use any other quotes in the system.
Clock In/Out:	This permission has two functions. First, it adds a quick link to the main homepage. Second, this is the basic time clock permission for all hourly employees. They will be able to clock in and out using digital time cards. Note: the payee/users must be assigned to a department before they can use the time clock.
My Hours:	This permission is the little buddy to the "Clock In/Out" permission. This allows the user to look-up his/her hours entered into the system. The user may search all back records to see past and current hours worked.
Password & Profile:	This permission allows a user to update his/her username, password, phone, email, and other personal info. There is also a link to view the user's personal login history.
Finance Loan Calculator:	This permission allows the user to have direct access to a special amortization or finance calculator. The calculator will figure out payments, show extended totals, and figure out total interest that will be paid over the life of the loan. The calculator allows for dynamic odd first payments (days till first payment), trade-ins, and down payments on the loan.

View Web Inventory: This permission provides a quick link to the adilas.biz web/customer application. This is a section of special pages that allow for stock/units and web inventory to be viewed outside the protected environment. All data is "View Only" and filtered to show a customer friendly version of the underlying data. This allows information and photos to be shared with the general public without a secure login.

System Requests

Basic Check Requests: This feature allows a user to submit a check request for approval. Once submitted, an admin person will need to approve the expense and mark the request as approved or declined. Once the check gets approved, the user will be able to print out the check (if using the adilas.biz check write system). The user should also have the "Basic Expense/Receipts" permission to fully get the most out of this permission.

Admin Check Request: This is the admin permission for approving/declining check requests. If a user has this permission, they will be able to approve/decline all check requests in the system. They will also be able to see all request amounts even if request was marked private (hidden values to non admin users).

System Reports

Corp/User History: This permission allows the user to view what happened (effectual) and who touched what records in the system (historical). The adilas histories are system-maintained behind the scenes and are a huge asset and provide a great audit trail. These reports also help managers and admin persons know what is going on with a click of their mouse. If the user has permissions to view financial records (income statement, P&L, and balance sheet), there are additional settings and report values. Each item that is returned will have a drill-down link directly to the underlying data.

Parts & General Inventory: This permission allows a user to view parts and general inventory items. All items that are tracked as a group are called "parts". Individual items are called "units" (usually serialized units). This permission allows a user to run different parts searches including shopping cart searches. This also deals with being able to sell parts out of the system. The main sales permission is under "Add/Edit Customers". Other recommended permissions are "My Quotes", "Basic PO's", "Basic Deposits", and "Basic Invoices".

In order to add/edit parts, the user must have the "Basic PO's" permission.

Parts Admin: This permission allows a user to modify costs, prices, and mark-ups on parts (general inventory). It also allows them to use special reports for parts management purposes including updating inventory counts and other special reports.

Units In Inventory: This permission allows the user to search all units that are currently in inventory or status = "Inv".

Sold Units: This feature allows the user to search for sold items, totals, and other special reports dealing with sold units. Users will be able to see profit, gross sales, and other corporation specific numbers.

Running Bank Balance(s): This permission allows the user to search all running bank balance(s) for your corporation. This is a view only permission (different reports) but will show all banks and all totals at the click of a button. This is also how you get to the bank deposit and check registers. This permission also has direct links to all outstanding deposits and expense/receipts.

Income Statement (P&L): This permission allows a user to search and view corporation level income statements and/or profit and loss statements (P&L). This report also has a number of drill-down links to actual data behind the numbers. The user should have admin clearance if using the drill-down links to view and alter data. If the user does not have admin clearance, the income statement will be in view only mode.

Balance Sheet: This permission allows a user to view and look-up date sensitive items that show up on the balance sheet. The adilas.biz system uses a number of system maintained and user maintained balance sheet items to show a standard balance sheet report. This permission only allows the user to view, search, create reports, archive, and view drill-downs into underlying numbers and data. If admin permissions are needed for the balance sheet, see "Add/Edit Balance Sheet Items" permission for details.

Add/Edit Balance Sheet Items: This is the admin permission over balance sheet items. This includes the ability to create, edit, view, and maintain user defined balance sheet items. This permission also allows access to the balance sheet groupings and dynamic naming conventions sections. The basic "Balance Sheet" permission is also needed to make this section fully functional.

System Assets

Basic Quotes: This permission allows the user to view and create saved shopping carts or quotes. The main "Add/Edit Customers" and "Parts & General Inventory" permissions are required. The "Basic Invoices" permission is recommended to make this section fully functional but not required. If the "Basic Invoices" permission is not selected, the user will only be able to quote and will have no access to actual invoices or part number costs and profit.

Quotes may be saved as often as needed. Quotes may also be saved in Adobe PDF format for email purposes. Quotes may be used as a stand-alone item or used to prep sales info during non-peak times and then restored to an active cart to speed up the invoicing process. There is also a save as... feature for quotes that allows you to create a quote and then save different versions from the main quote.

There is also a mini version of this permission called "My Quotes" under system basics. This mini version is literally a "My Quotes" and is limited to the specific user. They still have full rights and options, but they can only interact and see their own quotes.

Basic Invoices: This permission allows the user to create a new shopping cart, add/edit basic invoices, add/edit payments to invoices, create and manage invoice statements, and do basic invoice searches. Once an invoice is marked "Oked" for payroll, the invoice will be locked to these persons. The user should also have the "Add/Edit Customers" permission.

Admin Invoices: This permission will allow the user admin rights over invoices which include approving for payroll, verifying, and special invoice reports.

Basic Recipe/Builds: This permission allows the user the ability to use the recipe/build (assembly and manufacturing) interface. A recipe has a bill of materials and allows you to create things (package deals, kits, bundles, groups, options, etc.). The user is then able to use a single recipe to push all of the items to a single invoice or internal PO using the build process. The recipe sales process is called build and sell. The manufacturing side of the recipe and build is done by using a build PO (internal purchase order). This allows a user to take raw goods, perform some sort of change or mixing function, and then create a new output that may be sold or passed down the line. This process is called build and hold. The user will also need the internal build PO permission under liabilities if they are going to be doing any type of in-house manufacturing.

Admin Recipe/Builds: This is the admin level for the recipe/build section. This permission allows the user the ability to create the actual recipe that will be used in the build process.

Transition Invoice: This is a special transitional invoice permission. Basically, the invoice is between a quote and an invoice. Other common names for this type of invoice are layaway, work in progress, work order, etc. With this permission, you can set the invoice type to transition and it will not show up on the income statement or P&L (and other reports) while in that status. It will however show up as a system maintained balance sheet item. Once the job or invoice is fully complete, an admin person is able to record the work in progress date range and change it back to a normal customer invoice. Once this happens, the invoice is treated just like a normal invoice and it shows up on the P&L, sales tax report, and receivables reports if not paid in full.

Admin Transition Invoice:	This is the admin permission over transitional invoices (layaways, work in progress, work orders, etc.). With this permission, the user will be able to flip a transitional invoice from the transition state to a normal invoice. This helps control who has the power to record an invoice as actual income (have it show up on the books). It also gives the user the final say over the transitional date range values (how long was it in transition). This is an admin permission.
Wholesale - Cart Builder:	This permission has a manufacturing component assigned to it. Basically, you may quote or sell multiple stock/units (up to 100) per invoice using an accelerated shopping cart builder. This is a point and click interface with checkboxes and fields to alter prices if needed. This feature will set all taxes to \$0.00 and will not include any other doc or title fees. No trade-ins are allowed and no extras. If any of these extras are needed, you will need to use the normal retail cart and checkout process.
Cross-Corp Sales:	This is a special extension permission for the wholesale - cart builder. With this permission, the user will be able to sell (up to 20) stock/units on a special cross-corp invoice. This will mark the units as sold in the main corporation and will also stock in the units in the receiving corporation. In order to use this permission, the shopping cart must be in the wholesale - cart builder mode and the user must have at least 2 corporations they are assigned to. This permission is perfect for a manufacture to dealer relationship or a mother corporation to a daughter corporation relationship.
Basic Deposits:	This permission allows a user to view basic deposits. They can print and view history items. This permission does not allow the user to create or edit any deposit info. They must have the "Sales Deposits" permission or the "Admin Deposits" permission in order to add/edit deposit info.
Sales Deposits:	This permission allows a user to build deposits using invoice payments only. They have no line item edit capability but may edit the main deposit info. They must also have the "Basic Deposits" permission in order to get into the deposit homepage.
Admin Deposits:	This is the permission that allows a user to verify a deposit and make special changes. This permission also allows a user to have an expanded or more open deposit environment. This permission should also have the "Basic Deposits" permission and the "Sales Deposits" permission. This will allow the user full access to the entire deposit section.
Basic Receivables:	This permission allows the user to look up aged accounts receivables (monies owed to us or expected incoming monies). This permission is a view only permission and does not allow any editing of data. Reports include grouped customer reports - (general monies owed), new payments - (not yet deposited), deposited payments (waiting for verification), invoices missing payments, and pending & outstanding invoices.
Admin Receivables:	This permission allows the user to modify the deposit status (link between a deposit and an invoice payment) on receivables.
Reoccurring Invoices:	This permission allows the user to setup reoccurring invoices, reminder dates, and the ability to duplicate invoices in mass quantity.
Basic Statements:	This permission allows the user to create, view, and edit customer statements. A statement is a sub report of the invoice section and what monies are still owed and/or already paid. Other recommended permissions are "Basic Invoices" and "Basic Receivables".
Add Stock/Unit To Inventory:	This permission allows the user to stock in new inventory units into the system. The system will auto generate a new stock number for the unit. This permission also gives the user permission to add/edit basic unit details. Note: If you ever need to change the max stock number, contact a system administrator for help.
Add Old Stock/Unit:	This permission allows a user to go back and stock in a unit that is older (not an auto incremented stock number) into the system.
Manager Checkbook:	This permission allows the user to go into a special application that is set up like a checkbook for inventory unit adjustments. The user gets units assigned to him/her and then they can use funds to adjust the inventory basis up or down depending on what funds they have allotted to them. The users are limited by funds available and by units assigned to them. This is a manager-level permission.

Admin Checkbook - Units:	This is the admin permission for the manager checkbook. This allows the user to look at all units and numbers (including those not specifically assigned to them) and apply inventory loss or mark-downs at will. There is no tie between money available and what the user can do. This is similar to having free reign on the inventory adjustment accounts for all units.
Repairs To Stock:	This allows the user to have full access to add/edit outside repairs to a single stock or unit number. This permission will not show up on the main switchboard page but will be used on the stock detail page.
Parts To Stock:	This allows the user to have full access to add/edit parts to a single stock or unit number. This permission will not show up on the main switchboard page but will be used on the stock detail page.
Misc To Stock:	This allows the user to have full access to add/edit miscellaneous items to a single stock or unit number. This permission will not show up on the main switchboard page but will be used on the stock detail page.
Inv. Adjustments To Stock:	This allows the user to have full access to add/edit inventory adjustments to a single stock or unit number. This permission will not show up on the main switchboard page but will be used on the stock detail page. The "Manager Checkbook" permission allows controlled access to this sub-section. This permission gives full rights over all units and the unit adjustment accounts.

System Liabilities

Basic Expenses/Receipts:	This permission allows a user the ability to add/edit basic expense/receipts, view, print, and search expense/receipts. Once an expense gets locked and verified, the user cannot make any other changes. If an expense/receipt is marked private, the user will have very limited ability to view and edit the expense/receipts. All numbers are kept hidden (only on items marked private).
Expenses/Receipts Admin:	This permission is the admin level for expense/receipts. User will have the ability to verify a receipt, alter line items, and lock expense/receipts. The user will also be able to see all expense/receipts that are marked private. This permission gives the user full rights to all expense/receipt options.
Basic PO's:	This is the basic permission for PO's or purchase orders. This allows a user to add/edit, view, print, and search PO's. This permission also includes the ability to order and/or request products from a specific vendor. Once a PO has been locked or verified, the user will no longer be able to edit PO details. PO's are used to get parts (general inventory - tracked as a group) into the system. This permission is also the main permission for adding and editing part numbers in the system.
Internal Build PO's:	This is a special PO type that allows a user to take raw materials and put them together (or alter them in some way) to create a new or different product. An example might be: Say you wanted to make a cake. The raw materials might be flour, sugar, eggs, etc. Once you combine them and cook it (somehow alter or combine the original ingredients), it becomes a cake. This is how the system tracks inventory and creates final product from existing parts or components. This permission is required if using recipes and build and hold functions. [see add/edit po help file]
Special PO's:	This permission is somewhat of an advanced setting for PO's. It is used primarily for companies that buy the same item from multiple vendors and don't want to track the items by vendor. A basic PO is vendor specific and may be created as a request or as a live PO. A special PO is very similar except it allows multiple vendors on a single PO. This allows bulk and/or generic parts to be added to the system without requiring them to be tied to the main PO vendor. These PO's also have the ability to assign the account payables vendor (who is actually getting paid) while allowing a flexible general section for adding inventory items. [see add/edit po help file]
Purchase Orders Admin:	This permission allows a user to verify PO's and other admin functions for purchase orders such as locking, editing, etc.

Basic Payables:	This permission allows the user to look up aged accounts payables (monies that we owe and/or expected outgoing monies). This permission is a view only permission and does not allow any editing of data. Reports include grouped vendor/payee reports (general who do we owe), splits (payments made on account), PO's (purchase orders), stock/unit payables (inventory and floorplan), and reimbursements. The user should also have the "Basic Expense/Receipts" permission to fully be able to view all payable details.
Admin Payables:	This permission is the admin level for payables. This allows the user to create special split payment receipts for goods/services purchased on account (basic accounts payable). It also allows the user to create special reimbursement receipts. The feature has admin payment options for PO's, stock/units, etc. Basically, this permission should be given to the person in charge of making payments or your accounts payable person.
Floorplan:	This permission is the basic floorplan application for units or stock numbers. It includes being able to change title accounts, add/edit title accounts, add/edit asset types, and move units to different accounts at will. It also includes a special search and move multiple units page that is specifically setup for managing a corporation floorplan. Admin permission.
Managers Time Clock:	This permission is the manager level over the system time clock. Each person using the time clock will be assigned to a department. With this permission, a specific manager/user will be allowed to add/edit, view, and manage time cards for users within their assigned department(s). They can only see other users within their department(s). Once a time card gets locked, managers will be restricted from editing that time card. Please Note: This permission is set up in a two step process. 1. The person needs this permission turned on. 2. An administrator needs to assign the user to departments from a special link within the "Admin Time Clock" homepage.
Admin Time Clock:	This is the admin permission over the system time clock. It allows the user to add/edit, lock, unlock, and view custom reports dealing with time cards and hours worked. Admin permission.
Payroll:	This is the main payroll permission. It gives the user access to the main payroll home page where other sub categories and options are listed. Subs include payroll prep reports, calculating payroll, add/edit pay stubs, payee/user totals and withholdings, and other payroll reports.
Payroll Admin:	This permission is one step above the normal "Payroll" permission. With this permission, the user will be able to modify all payroll dates on a per unit or per invoice level. Most of these dates are generated by the system through normal payroll functions.

System Maintenance

Photo Management:	This permission has seven different areas where it will allow the user to add/edit photos. The areas are stock units, expense/receipts, invoices, PO's, parts (general inventory), customers, and user maintained balance sheet items. The application allows a user to upload jpeg images. The system will rename, resize, and store the images in the database. The process is fully automated and the user only needs internet access and a digital camera or a scanner. The user must have the corresponding permission (i.e. stock units, expense/receipts, customers, etc.) in order to add/edit photos in that area.
Add/Edit Flex Grid:	This is the basic flex grid permission. This is required to add, edit, view, and search flex grid options. The flex grid is a mini application that helps with additional details, tie-ins, drill-downs, and extra relationships from one main application type to another. This is one of the most flexible applications within the adilas.biz system. See the following flex grid homepage help file for more information on the flex grid. [see flex grid help file]
Admin Flex Grid:	This is the admin level for setting up the flex grid tie-in application for your corporation. This permission allows the user to create up to 10 custom fields (call flex grid titles) for each of the main 10 application types. The main application types are: deposits, invoices, PO's, expense/receipts, user-maintained balance sheet items, stock/units, customers, vendors, employees, and part numbers.

Add/Edit Customer:	This permission has two main functions. First, it allows a user to add/edit customer/contacts, user-maintained log files, customer follow-up records, and customer image/scans (if the user has photo management permission). Second, this permission is also required for basic sales, shopping cart functions, invoices, and creating quotes out of the system.
Customer Admin:	This is the admin level for customers. With this permission, the user will be able to manage customer types, manage the customer credit limits, terms, and other customer based settings.
Add/Edit Vendor:	This permission gives the user the options of add/edit vendor/payees (except for employees). Vendors are used in PO's, parts, check requests, and basic expense/receipts.
Add/Edit Expense Type:	This is the permission to add/edit expense types. The expense types are the categories for what you are paying for (rent, utilities, advertising, taxes, etc.). These types are used on the line items of the expense/receipts. This is an accounting-level permission.
Add/Edit Deposit Type:	This is the permission to add/edit deposit types. The deposit types are the categories for what you are depositing money for (sales, bank transfers, fees, etc.). These types are used on the line items of a deposit. This is an accounting-level permission.
Global Parts Mark-up:	This permission allows the user to look-up and modify the mark-up and saleprices for multiple parts (general inventory) at a single time. Admin feature.
Global Trailer Mark-up:	This permission deals with corporations that sell trailers as inventory units. It allows a user to apply global mark-ups for all trailers in inventory. The user can search and apply mark-ups to multiple units at a single time. Admin feature.
Add/Edit Model:	This permission allows the user to add/edit models, add/edit usage classes, and add/edit common features. This permission deals with all inventory types associated with a corporation and is recommended for admin and top managers.
Add/Edit Make:	This permission allows the user full access to all of the makes within the corporation. They can add, edit, delete, and change the inventory type for all makes. This is an admin or top manager permission.
Add/Edit Bank:	This permission allows a user to add or edit banks within a specific corporation. If desired, each bank may be configured to use the adilas.biz system to print out checks entered into the system. The check write system allows for blank and pre-printed laser, ink jet, and dot matrix checks to be used. This permission also shows running bank balances for all banks within your corporation. Admin or accounting-level permission.
Add/Edit Department:	This permission allows a user to add/edit departments for a corporation. This is also where users get assigned to different departments within the system. Departments deal with time cards and payroll. Admin or accounting-level permission.
Add/Edit Location:	This permission allows a user to add/edit location(s) for his/her corporation. This includes basic location information, all location specific taxes, licenses, etc. There are also special sales related items that may be set up on a location specific level. Admin or accounting-level permission.

System Management

Add/Edit Payees & Permissions:	This permission allows users to create new employees (payees) and assign them basic permissions. They can also reset passwords, update employee/payees and edit a small number of application permissions that are turned on by an administrator.
Manage Corp Info & Permissions:	This permission is the top level permission for a corp administrator. It has two main functions. First, it allows them access to edit main corporation details and settings including corporation look and feel (colors and corp info). It also has added permissions that may be assigned if used in conjunction with the "Add/Edit Payees & Permissions" permission. This is the top level permission for a corporation. Having this permission allows the user to turn on/off any permission in the system.
Deposit & Receipt Final Post:	This permission allows the user to post or put an admin lock on all deposits and expense/receipts. No one can change the data without this permission once it has been posted.

**Stock Lockdown &
Sold Info:**

The stock lockdown is an admin feature that allows the user to view sold unit info, do unit updates, and other stock/unit related items. This feature does not have a timeout and gives full access to the unit. Most normal users will get locked out of unit updates after it has been sold for a short amount of time.

This feature also allows the user to edit items like date_in, base_price, vin, etc. These fields are normally locked down to basic users.

**Inventory Admin
Permission:**

This permission allows a user to change the model id number of an existing stock number. Normally, the model id number is controlled behind the scenes and is required to stock an item in. This permission is an admin edit feature for the model id number.