Office - Security Rights Manual

2020 - Winter Edition

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Overview

Security Rights control access levels for all employees at a Club using CMA. Admins can grant permissions at the Group level and add permissions on at an Employee level as well. This guide is designed to explain each Security Right and the permissions it gives the User within each module in CMA.

Please reference the guide on Office - Employee - Groups for more information on how to create a Group and grant security rights at that level.

Use Case(s):

The Club has hired a group of seasonal wait staff to account for the summer rush at the pool and bar. These new seasonal staff members will need to be created as a group and then given the appropriate permissions for POS Terminals such as Creating a Ticket or granting a Discount. But the Club might not want the seasonal staff to be able to void an item or bypass the payments screen. All of these access levels would be granted under the POS Terminal section of Security Rights.

Accounts Payable

Controller, Accounting Staff, Bookkeepers, AP Clerk

Accounts Payable Dashboard

Allows employees to view the Accounts Payable Module

Approve Payment Batches

View/Edit/Create/Delete access levels to vendor payment batches that populate within the "Approve Payment Batches" Accounts Payable module.

Approve Vendor Invoice Batches

View/Edit/Create/Delete access levels for vendor invoice batches within the "Manage Vendor Invoices" Accounts Payable module.

Enter Vendor Invoices

Allows employees the ability to enter vendor invoices

Import Vendor 1099 Update -

Controls access to the Vendor 1099 Update Tool located within the Accounts Payable drop-down menu.

Manage Credit Memos

This functionality is no longer used in CMA, Negative Vendor Invoices

Manage Item Receipts

Allows View/Edit/Create/Delete Item Receipts within Accounts Payable Module

Manage Purchase Orders

Allows View/Edit/Create/Delete Purchase Orders within the Accounts Payable Module

Manage Vendor Invoices

Allows View/Edit/Create/Delete Vendor invoices within the Accounts Payable Module; also allows user to Enter Vendor Invoices.

Manage Vendors

View/Edit/Create/Delete access levels for Vendor profiles

Pay Bills

Allows employees the ability to access the Pay Bills Module, this is followed up by print checks

Print Checks

Allows employees the ability to access Print Checks

Quick Check

Allows the user to print a check from start to finish; Enter invoice, create batches, pay bills, and print check is the end result.

Unpost Vendor Invoice Batch

Allows employees the ability to un-post vendor invoice batches

Vendor 1099 Category

Allows View/Edit/Create/Delete 1099 categories, this designates which form type and box number information should be populated into.

Vendor Categories

Allows View/Edit/Create/Delete vendor categories; used for reporting

Vendor Custom Fields

Allows View/Edit/Create/Delete vendor custom fields

Vendor Payment Terms

Allows View/Edit/Create/Delete vendor payment terms

Vendor Statuses

Allows View/Edit/Create/Delete vendor status'; oftentimes these will be active or inactive

Void Checks

Allows employees to access Void Check Wizard and go through the process of voiding a check

Employee

General Manager, management, administrators.

Employee Custom Fields

Allows you to View/Edit/Create/Delete custom fields for employees that you want to see such as emergency contact information.

Employee Dashboard

Allows you to View/Edit/Create/Delete dashboards for employee info, much like when you create a dashboard for F & B. Displays pertinent info.

Employee Groups

Allows you to View/Edit/Create/Delete groups for employees such as admin, management, servers, front desk staff, etc.

Employee Job Code Rates

Allows employees to define the rates for various Job Codes

Employee Job Codes.

Allows you to View/Edit/Create/Delete Employee job codes. Job Codes group employees based on their normal job functions. These are assigned to the employee's profile under job codes. An employee may have more than one job code assigned.

Employee Schedule

Part of the scheduling module and not apart of the standard CMA package. You can get it and it's free but you have to request this module.

Employee Shifts

Part of the scheduling module and not apart of the standard CMA package. You can get it and it's free but you have to request this module.

Employee Status Types

Allows you to View/Edit/Create/Delete status types for employees such as pre-hire, new hire, regular, terminated, non-rehire. The types are assigned in the employee's profile under personal> employment status.

Employee Time Off Requests

This is part of the scheduling module.

Employee Types

Allows you to View/Edit/Create/Delete types for employees such as full-time, part-time, contract. Etc. These types are assigned in the employee's profile under personal ➜ Employee Type.

Manage Employees

Allows you to View/Edit/Create/Delete Employees and access them in the employee grid.

Events

F&B management, Accounting, GM, Managers

Manage Events

Allows you to View/Edit/Create/Delete Events (such as parties, dinners, outings, etc.), these show on the Events Tabs in POS

General Ledger

Controller, Accounting Staff, Bookkeepers, Management

Allow Posting to Control Accounts

This allows posting to a control account. A control account holds the summary of it's sub-accounts so posting directly to it could cause an issue with financial statements and the ability to post should be limited to the Controller

Allow Posting to Restricted Periods

Once a period is closed, posting anything to it can cause an issue with balances so you want to limit who can do so.

Approve Journal Entry Batches

Allows others to make journal entries but they have to be approved by someone before they can be posted

AR Transaction Types

Allows user access to different transaction types, pos tickets, member charge batches, invoice transfer

Bank Reconciliation Wizard

Allows access to bank rec wizard, entering a bank rec, making changes to it, deleting or re-opening a bank rec

Create Journal Entries

Ability to create, edit, view and delete General Journal Entries

Currency Types

This allows users to change the currency type, $, #, or Franc for example.

Financial Statements in Excel

Allows Access to Financial Statements in Excel

General Ledger

Allows Access to the General Ledger Module in CMA. Normally Reserved for Management and Controller/Accountant

General Ledger Dashboard

Allows access to view the GL Dashboard, there is only view access, no Edit, Create, or Delete options

Import Annual Journal Entries

Ability to Import Annual GL Entries from a csv file

Ledger Accounts

Ability to View, Edit, Create or Delete General Ledger Accounts. You need view access to be able to see GL information on reports. Edit, Create, and delete access is typically reserved for Controller/Accounting Manager

Ledger Budgets

Ability to View, Edit, Create, or Delete General Ledger Budgets. View access is needed to see budget information on reports. This allows budget amounts added to GL accounts.

Ledger Categories

Ability to View, Edit, Create or Delete General Ledger Categories. The default is Asset, Expense, Liability,

Ledger Companies

Ability to View, Edit, Create or Delete General Ledger Companies
Companies are a separate set of GL Accounts for different companies in the same business unit. An example would be an HOA and Club owned by the same corporation.

Ledger Departments

Departments are used to group GL Entries. For example F&B, Golf, Tennis.

Ledger Overview

Shows the structure of GL accounts based on which report you are looking at. For example, Balance Sheet or Income Statement.

Ledger Periods

Ledger periods divide the Fiscal Year into 12 separate periods, normally months. If a calendar-based fiscal year is used then this would be January-December.

Ledger Rollups

Tells you which Ledger Category the individual GL Accounts are in.

Ledger Types

Types are typically: Income, Expense, Asset, Other Asset, Liability, Equity

Manage Memorized Entry

Allows editing/deleting of Memorized GL Entries

Unpost Journal Batch

Allows un-posting of GL Entry Batches

Year-End Wizard

Used to close the fiscal year, makes Year-End Gl entries such as moving income to Retained Earnings

Guest Rooms

Controller, Guest Room Manager, concierge staff, housekeeping

Allow Rate Adjustment

View access levels within the Guest rooms dashboard when creating a new room booking. This allows the user to make updates to any pre-built room rate in the system within the reservation window. Useful for up charging or discounting room rates.

Bulk Reporting

View access level to the Bulk Reporting Report within the Guest Rooms Module. Here the club can view and print various documents such as folio pricing, parking passes, and registration cards.

Guest Room Dashboard

View/Edit/Create/Delete access levels to the guest rooms module dashboard. Here the club can create new reservations and edit, charge out, or delete existing ones. They can send various notifications to guests as well. View the Guest Rooms knowledge base article for more.

Guest Room Dashboard Super User

View/Edit/Create/Delete access levels to Guest room block management. The club can use this to prevent members and guests booking rooms for specific time ranges. See Blocks for more details.

Guest Room Folio Charge Wizard

View access level to the Manual Folio Charge Wizard within the Guest Rooms Manual. See the Manual Folio Wizard for more information.

Manage Guest Amenities

View/Edit/Create/Delete access levels to the guest amenities settings located in the guest rooms settings dropdown. Allows employees to manage any add ons a guest may need.

Manage Guest Locations

View/Edit/Create/Delete access levels of the locations settings located in the Guest Rooms setting dropdown. Allows employees to manage the physical locations of guest rooms.

Manage Guest Room Rate Categories

View/Edit/Create/Delete access levels to Room rate categories. These are what connect rooms to their rates and allow room rentals to charge members.

Manage Guest Room Rates

View/Edit/Create/Delete access levels to the room rates setting area. Here the club can build out new room rates for charging members and guests in the module.

Manage Guest Room Stay Types

View/Edit/Create/Delete access levels to build various lengths and styles of room rental. Includes duration length.

Manage Guest Room Types

View/Edit/Create/Delete access levels to the Guest Room Types setting in the Guest Rooms setting dropdown. Allows employees to manage the room types rented by guests.

Manage Guest Rooms

View/Edit/Create/Delete access levels to the Rooms settings in the Guest rooms setting dropdown. This allows employees to manage rooms in each location and what amenities they are allowed.

Night Audit Wizard

View access level to the Night Audit Wizard. See Night Audit Wizard for more details.

Guests

Membership director, front desk staff, Golf shop staff, Tennis staff, Spa staff, Fitness personnel.

Guest Custom Fields

View/Edit/Create/Delete access levels to guest custom fields.

Guest Types

View/Edit/Create/Delete access levels to guest types. Such as local, Resident, Non-Resident, Prospective.

Manage Guests

View/Edit/Create/Delete Guest Accounts.

Items

Employees such as accountants, inventory keepers, Golf Pro, Food & Beverage managers, Managers.

Approve Inventory Adjustment

View: Allows access to see the Approved Inventory Adjustment grid
Edit: Allows employees the ability to edit existing unposted Inventory Adjustment Batch such as batch activity date and posting
Create: Allows employees the ability to hit the New button on the grid to begin a new batch, though it must be edited and items added through the Inventory Adjustment Wizard
Delete: Allows employees to delete unposted Inventory Adjustment batches

F&B Dashboard

Allows access to the Classic Dining Dashboard, Dining Dashboard, and Custom Dashboards within the Club Intelligence module.

Inventory Adjustment Wizard

Allows the employees the ability to use the Inventory Adjustment Wizard which is used to correct Inventory Counts.

Inventory Count Wizard

Allows the employees the ability to use the inventory Count Wizard. This is used to do a physical Inventory Count.

Item Modifiers

View: Allows access to see the item modifiers
Edit: Allows employees the ability to edit existing item modifiers
Create: Allows employees the ability to create item modifiers
Delete: Allows employees the ability to delete existing item modifiers

Items Dashboard

Allows access to the Items Dashboard located under Club Intelligence module.

Manage Item Categories

View: Allows access to see the Item Categories
Edit: Allows employees the ability to edit existing Item Categories such as adding/removing items from it, changing override settings, renaming/deleting, print config, etc
Create: Allows employees the ability to create item categories
Delete: Allows employees the ability to delete existing item categories

Manage Item Combos

View: Allows access to see the item combos
Edit: Allows employees the ability to edit existing item combos such as price, overrides, and items in the combo
Create: Allows employees the ability to create item combos
Delete: Allows employees the ability to delete existing item combos

Manage Item Groups

View: Allows access to see the item groups

Edit: Allows employees the ability to edit existing item groups such as account settings (area overrides included), folio grouping, name and description
Create: Allows employees the ability to create item groups
Delete: Allows employees the ability to delete existing item groups

Manage Item Modifier Groups

View: Allows access to see the item modifier groups
Edit: Allows employees the ability to edit existing item modifier groups such as the item modifiers inside group, price adjustment, type of group, and etc.
Create: Allows employees the ability to create item modifier groups
Delete: Allows employees the ability to delete existing item modifier groups

Manage Items

View: Allows access to see the item
Edit: Allows employees the ability to edit existing items such as the category, name, price, print config, etc.
Create: Allows employees the ability to create items
Delete: Allows employees the ability to delete existing items

Manage Price Scheduling

View: Allows access to see the price schedule
Edit: Allows employees the ability to edit existing price schedules and all associated settings
Create: Allows employees the ability to create price schedules
Delete: Allows employees the ability to delete existing price schedules

Retail Dashboard

Allows access to the Retail Dashboard located under Club Intelligence module

Membership

Employees such as Membership directors, General Managers, administrators and controllers.

Allow Member Financial Display

An “On/Off” permission, checked means this employee has access to all Financial Information fields found in member profiles.

Approve Cash Receipt Batches

View/Edit/Create/Delete permissions that allow employee use of Approve Cash Receipt Batches found in the Membership Module side-bar in CMA Office.

Approve Charge Batches

View/Edit/Create/Delete permissions that allow employee use of Approve Charge Batches found in the Membership Module side-bar in CMA Office.

Approve Credit Book Batches

View/Edit/Create/Delete permissions that allow employee use of Approve Credit Book Batches found in the Membership Module side-bar in CMA Office.

Change Reasons

View/Edit/Create/Delete permissions that allow employee use of Change Reasons found in the Membership drop-down in CMA Office.

Clear Custom Billing Schedules

An “On/Off” permission, checked means this employee can access the Clear Custom Billing Schedules wizard found in the Membership Module side-bar in CMA Office.

Clear Minimum Adjustment

An “On/Off” permission, checked means this employee can access the Clear Minimum Adjustment wizard found in the Membership Module side-bar in CMA Office.

Company Types

Said to be a useless feature that was in the old code and just never got removed.

Configure Remote Relays

Allows access to edit the remote relays located in System>System Settings>Services>Remote Relays

Create Member Statements

An “On/Off” permission, checked means this employee can access the Print Member Statements wizard found in the Membership Module side-bar in CMA Office.

Credit Book Expiration

An “On/Off” permission, checked means this employee can access the Credit Book Expiration wizard found in the Membership Module side-bar in CMA Office.

CRM

View/Edit/Create/Delete permissions that allow employee use of CRM found in the Membership module side-bar in CMA Office.

CRM Types

View/Edit/Create/Delete permissions that allow employee use of CRM Types found in the Membership drop-down in CMA Office.

Delete Captured Cash Receipt

An "On/Off" permission, checked means this employee can Delete Captured Cash Receipts for refunds. See CRC:
https://clubessential.atlassian.net/wiki/spaces/OF/pages/3473871/Office+-+Credit+Card+-+Member+Payments#Office-CreditCard-MemberPayments-RefundCreditCardPayment
OR
https://clubessential.atlassian.net/wiki/spaces/OF/pages/3473856/Office+-+Bank+ACH+-+Member+Payments#Office-BankACH-MemberPayments-RefundBankACHPayment

Gift Card Expiration

An "On/Off" permission, checked means this employee can access the Gift Card Expiration wizard found in the Membership Module side-bar in CMA Office.

Golf Fee Categories

View/Edit/Create/Delete permissions that allow an employee use of Golf Fee Categories found in the Membership drop-down in CMA Office.

Golf Fee Types

View/Edit/Create/Delete permissions that allow employee use of Golf Fee Types found in the Membership drop-down in CMA Office.

Import Installment Billings

An "On/Off" permission, checked means this employee can access the Import Installment Billings wizard found in the Membership drop-down in CMA Office.

Import Starting Balance

View/Edit/Create/Delete permissions that allow employee use of Import Starting Balances wizard found in the Membership drop-down in CMA Office.

Invoice Transfer Wizard

An “On/Off” permission, checked means this employee can access the Invoice Transfer wizard found in the Membership Module side-bar in CMA Office.

Manage Members

View/Edit/Create/Delete permissions that allow employee use of Manage Members module in CMA Office.

Marketing Campaign

View/Edit/Create/Delete permissions that allow employee use of Marketing Campaigns found in the Marketing Module side-bar in CMA Office. (See Member Marketing Role)

Marketing Templates

View/Edit/Create/Delete permissions that allow employee use of Manage Templates found in the Marketing Module side-bar in CMA Office. (See Member Marketing Role)

Marketing Wizard

An “On/Off” permission, checked means this employee can access the Marketing wizard found in the Marketing Module side-bar in CMA Office. (See Member Marketing Role)

Member Account Status

Allows access to member status, Active, Resigned, Deceased, etc.

Member Addresses

View/Edit/Create/Delete permissions that allow employee use of Addresses found in the Membership drop-down in CMA Office.

Member Billing Schedules

View/Edit/Create/Delete permissions that allow employee use of Billing Schedules found in the Membership drop-down in CMA Office.

Member Cash Receipt Types

View/Edit/Create/Delete permissions that allow employee use of Cash Receipt Types found in the Membership drop-down in CMA Office.

Member Charges

An “On/Off” permission, checked means this employee can access the Member Charges wizard found in the Membership Module side-bar in CMA Office.

Member Credit Book

An “On/Off” permission, checked means this employee can access the Member Credit Book wizard found in the Membership Module side-bar in CMA Office.

Member Credit Book Types

View/Edit/Create/Delete permissions that allow employee use of Credit Book Types found in the Membership drop-down in CMA Office.

Member Custom Fields

View/Edit/Create/Delete permissions that allow employee use of Custom Fields found in the Membership drop-down in CMA Office.

Member Emails

View/Edit/Create/Delete permissions that allow employee use of Emails found in the Membership drop-down in CMA Office.

Member Groups

View/Edit/Create/Delete permissions that allow employee use of Groups found in the Membership drop-down in CMA Office.

Member Groups Types

View/Edit/Create/Delete permissions that allow employee use of Group Types found in the Membership drop-down in CMA Office.

Member Marketing

An “On/Off” permission, checked means this employee can access the Marketing Module in CMA Office.

Member Minimums

View/Edit/Create/Delete permissions that allow employee use of Minimums found in the Membership drop-down in CMA Office.

Member Payments

An “On/Off” permission, checked means this employee can access the Member Payments wizard found in the Membership Module side-bar in CMA Office.

Member Preferences

View/Edit/Create/Delete permissions that allow employee use of Member Preferences found in a member’s profile side-bar in CMA Office.

Member Status Definitions

View/Edit/Create/Delete permissions that allow employee use of Status Definitions found in the Membership drop-down in CMA Office.

Member Types

View/Edit/Create/Delete permissions that allow employee use of Types found in the Membership drop-down in CMA Office

Membership Dashboard

An “On/Off” permission, checked means this employee can access the Membership Dashboard found in the Club Intelligence Module side-bar in CMA Office.

Month End Wizard

An “On/Off” permission, checked means this employee can access the Month End wizard found in the Membership Module side-bar in CMA Office.

Payment Transfer Wizard

An “On/Off” permission, checked means this employee can access the Payment Transfer wizard found in the Membership Module side-bar in CMA Office.

Player Types

View/Edit/Create/Delete permissions that allow employee use of Player Types found in the Membership drop-down in CMA Office.

Rental Categories

View/Edit/Create/Delete permissions that allow an employee use of Rental Categories found in the Membership > Rentals drop-down in CMA Office.

Rental Item Custom Fields

View/Edit/Create/Delete permissions that allow employee use of Rental Custom Fields found in the Membership > Rentals drop-down in CMA Office.

Rental Items

View/Edit/Create/Delete permissions that allow an employee use of Rental Items found in the Membership > Rentals drop-down in CMA Office.

Rental Types

View/Edit/Create/Delete permissions that allow an employee use of Rental Types found in the Membership > Rentals drop-down in CMA Office.

Statement Messages

View/Edit/Create/Delete permissions that allow employee use of Statement Messages found in the Membership drop-down in CMA Office.

Unpost Cash Receipt Batch

An “On/Off” permission, checked means this employee can unpost Cash Receipt Batches.

Unpost Credit Book Batch

An “On/Off” permission, checked means this employee can unpost Credit Book Batches.

Unpost Invoice Batch

An “On/Off” permission, checked means this employee can unpost Invoice Batches.

POS

Personas: Servers, Administrators, Managers, shop staff

Contests

View/Edit/Create/Delete permissions for employee sales contest setup in CMA, located within left hand navigation in the POS CMA module. Sales contests flow into POS and results can be viewed under the Contests tab.

Device Groups

This allows users to View/Edit/Create/Delete Device Groups. This is used to group printers so sending a ticket will hit all printers in group with one send command.

Device Types

This allows users to View/Edit/Create/Delete Device Types. These are Terminal or Printer normally.

Devices

This allows users to View/Edit/Create/Delete Devices. POS devices such as a terminal or printer.

Edit Area Layout

An “On/Off” permission, checked means this employee can View/Edit/Create/Delete Area Layouts. These are table layouts seen on POS so server can choose which table to attach order to.

Edit Gift Card Name After Issuance

Allows for employees to transfer gift cards to other members as well as non members. Without this setting enabled, you are only able to transfer to non-member. An “On/Off” permission, checked means this employee can modify the name on the gift card after it is issued.

Gift Card Types

This allows users to View/Edit/Create/Delete Gift Card Types

Manage POS Reason Codes

This allows users to View/Edit/Create/Delete POS Reason Codes such as DON'T SEND or ADMIN ADJUSTMENT.

Messages

This allows users to View/Edit/Create/Delete POS Messages

Screen Group Designer

An “On/Off” permission, checked means this employee can View/Edit/Create/Delete Screen Group Designs.

POS Terminal

Managers, Administrators

Allow Exceed Member AR Threshold

An “On/Off” permission, checked means this employee can allow a member to exceed AR threshold. This allows them to charge more than their normal limit.

Allow Exit POS

An “On/Off” permission, checked means this employee can exit POS

Allow Folio Lookup Override

An “On/Off” permission, checked means this employee can lookup closed folios.

Allow Item Management

An “On/Off” permission, checked means this employee can manage items.

Allow Login Override

An “On/Off” permission, checked means this employee can override logins.

Allow Negative Quantity and Returns

An “On/Off” permission, checked means this employee can process sales with negative quantity and returns.

Allow Negative when Asking for Price

An “On/Off” permission, checked means this employee can enter a negative price when asked for a price.

Allow Schedule Override

An “On/Off” permission, checked means this employee can override price scheduling.

Allow System Tools

An “On/Off” permission, checked means this employee can access System Tools, including the ability to transfer and modify tickets.

Change Other Servers Tickets

An “On/Off” permission, checked means this employee can modify other server’s tickets.

Comp Ticket

An “On/Off” permission, checked means this employee can comp a ticket without manager override.

Create Ticket

An “On/Off” permission, checked means this employee can create tickets

Delete Closed Ticket

An “On/Off” permission, checked means this employee can delete closed tickets

Discount Ticket

An “On/Off” permission, checked means this employee can discount tickets

Manage Events POS

An “On/Off” permission, checked means this employee can manage events in POS.

Manage Timekeeping

This allows users to View/Edit/Create/Delete timekeeping for themselves and other employees.

Override Sell Below Zero Inventory

An “On/Off” permission, checked means this employee can sell items that have 0 on hand.

Reopen Tickets

An “On/Off” permission, checked means this employee can reopen closed tickets.

Service Charge Exempt

An “On/Off” permission, checked means this employee can mark a ticket as exempt from Service Charge.

Skip Credit Card Processing in POS

An “On/Off” permission, checked means this employee can click on ‘Do not process’ when processing credit cards.

Tax-Exempt

An “On/Off” permission, checked means this employee can mark a ticket as exempt from tax.

Transfer Ticket

An “On/Off” permission, checked means this employee can transfer tickets between servers

Unlock Ticket

An “On/Off” permission, checked means this employee can unlock tickets

Void Item

An “On/Off” permission, checked means this employee can void items that have already been sent.

Reports

Controller, Retail staff, FnB staff, Guest Rooms Staff, Membership Director, GM, Catering staff, Accountant, Marketing Director.

Accounting Reports

View access to account reports via the reporting dashboard as well as ledger transactions report view in data genie. *They will only see data from Areas and Departments they have access to.*

Employee Reports

View access to employee reports in reporting dashboard as well as employee hours worked report view in data genie

Financial Report Writer

View/Edit/Create/Delete access levels to the financial report writer module

Guest Reports

View access to guest reports in reporting dashboard as well as guest visits report view in data genie

Guest Room Dashboard Reports

View access to guest rooms reports in the reporting dashboard

Inventory Reports

View access to inventory-related reports in the reporting dashboard

Item Reports

View access to item related reports in reporting dashboard as well as sales summary, sales with line item detail and sales with settlement detail report views in data genie

Label Reports

This allows printing of reports that produce labels.

Marketing Reports

View access to email delivery report

Membership Reports

View access to membership reports in reporting dashboard as well as member billing and member payments report views in data genie

Point of Sale Reports

View access to POS reports in reporting dashboard as well as gold round detail report view in data genie

Reservation Reports

Allows user to view Reservation Reports

Vendor Reports

View access to vendor reports in reporting dashboard as well as vendor purchases report view in data genie.

System

Personas: Controller, Manager

Address Categories

View/Edit/Create/Delete permissions that allow employee use of Address Categories found in the System drop-down in CMA Office.

Allow Mobile POS Ticket Reconciliation

An “On/Off” permission, checked means this employee can access the Mobile POS Ticket Reconciliation option under the POS drop down in CMA Office.

Area Categories

View/Edit/Create/Delete permissions that allow employee use of Area Categories found in the System drop-down in CMA Office.

Area Groups

View/Edit/Create/Delete permissions that allow employee use of Area Groups found in the System drop-down in CMA Office.

Areas

View/Edit/Create/Delete permissions that allow employee use of Areas found in the System drop-down in CMA Office.

Attachment Categories

View/Edit/Create/Delete permissions that allow employee use of Attachment Categories found in the System drop-down in CMA Office.

Charge Settlement Types

View/Edit/Create/Delete permissions that allow employee use of Charge Settlement Types found in the System drop-down in CMA Office.

Custom Field Categories

View/Edit/Create/Delete permissions that allow employee use of Custom Field Categories found in the System drop-down in CMA Office.

Import

Allows access to view/edit/change/delete importing functions such as budget or member payment importing.

Late Fees

View/Edit/Create/Delete permissions that allow employee use of Late Fees found in the System drop-down in CMA Office.

Locations

View/Edit/Create/Delete permissions that allow employee use of Locations found in the System drop-down in CMA Office.

Manage Private Notes

View/Edit/Create/Delete permissions for Notes found within Member and Employee profiles.

Meal Periods

View/Edit/Create/Delete permissions that allow employee use of Meal Periods found in the System drop-down in CMA Office.

Merchant Processing Tokens

View/Edit/Create/Delete permissions that allow employee use of Merchant Processing Tokens found in the System drop-down in CMA Office.

Name Suffix

View/Edit/Create/Delete permissions that allow employee use of Name Suffix found in the System drop-down in CMA Office.

Name Titles

View/Edit/Create/Delete permissions that allow employee use of Name Titles found in the System drop-down in CMA Office.

Note Categories

View/Edit/Create/Delete permissions that allow employee use of Note Categories found in the System drop-down in CMA Office.

Notification Types

View/Edit/Create/Delete permissions that allow employee use of Notification Types found in the System drop-down in CMA Office.

Sales Categories
View/Edit/Create/Delete permissions for Sales Territories located within the System drop-down menu. **Note:** Access to Sales Territories must also be granted for the menu item to be visible.

Sales Territories

Allows access to the Sales Territories menu item within the System drop-down menu

System Accounting Settings

An “On/Off” permission, checked means this employee can access the Accounting Settings option under the System Settings in the System drop-down in CMA Office.

System Accounts Payable Settings

An “On/Off” permission, checked means this employee can access the Accounts Payable Settings option under the System Settings in the System drop-down in CMA Office.

System Accounts Receivable Settings

An “On/Off” permission, checked means this employee can access the Accounts Receivable Settings option under the System Settings in the System drop-down in CMA Office.

System Employee Settings

An “On/Off” permission, checked means this employee can access the Employee Settings option under the System Settings in the System drop-down in CMA Office.

System Guest Room Settings

An “On/Off” permission, checked means this employee can access the Guest Room Settings option under the System Settings in the System drop-down in CMA Office.

System Membership Settings

An “On/Off” permission, checked means this employee can access the Membership Settings option under the System Settings in the System drop-down in CMA Office.

System Partner Products Settings

An “On/Off” permission, checked means this employee can access the Partner Products Settings option under the System Settings in the System drop-down in CMA Office.

System POS Settings

An “On/Off” permission, checked means this employee can access the Point of Sale Settings option under the System Settings in the System drop-down in CMA Office.

System Services Settings

An “On/Off” permission, checked means this employee can access the Services Settings option under the System Settings in the System drop-down in CMA Office.

System Settings

View/Edit/Create/Delete permissions that allow employee use of System Settings found in the System drop-down in CMA Office.

Tax Code Items

View/Edit/Create/Delete permissions that allow employee use of Tax Code Items found in the System drop-down in CMA Office.

Tax Codes

View/Edit/Create/Delete permissions that allow employee use of Tax Codes found in the System drop-down in CMA Office.

Terminals

View/Edit/Create/Delete permissions that allow employee use of Terminals found in the System drop-down in CMA Office.