

# User Group Security-Master Accounts

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For a User to be able to create or modify customer related information (Master Accounts and Subaccounts), certain security privileges must be granted to the User through the User Group Security options within SedonaSetup. The following User Group Security options located within Application Access/CM, DX and OP security options section pertain to Customer, Site, System record creation and maintenance.

Customer Explorer (CM) – Allow Users access to the Customer Explorer form.

New Customer (CM) – Allow Users to create a new Customer, Master Account, or Subaccount.

Manage Contacts (CM) – Allow Users to create a new or modify Billing or Site Contact names, addresses, phone numbers and email addresses.

Edit Existing Customer (CM) – Allow Users to modify information on existing Subaccount or Master Account records.

Create New Site (CM) – Allow Users to create a new Site on an existing Subaccount.

Edit Existing Site (CM) – Allow Users to modify information on existing Site records.

Create New System (CM) – Allow Users to create a new System on the Site of an existing Subaccount.

Edit Existing System (CM) – Allow Users to modify information on existing System records.

Create New Customer RMR (CM) – Allow Users to create new Recurring Lines on an existing Subaccount Site or System.

Edit Existing RMR – Allow Users to modify information on existing Recurring Line records.

Customer Custom Fields Site (CM) – Allow Users access to the Custom Fields tab on an existing Master Account or Subaccount. The User is also able to enter information into any field setup for data entry on the Customer Custom Fields form.

Customer Documents (CM) – Allow Users to view documents attached to a Customer, Master Account or Subaccount record. Users will only be able to view documents with a Security Level less than or equal to the User Group security level assigned to the User's User Group.

User Group (OP) – Each User Group contains a Security Level. This Security Level controls which levels of documents Users assigned to the User Group will be able to view. Each document that is attached to a Customer, Master Account, Subaccount, Site, System, Service Ticket, Part, Vendor or Job is assigned a security level when being saved.

Allow Document Edit (DX) – Allow Users to modify documents attached to a Customer, Master Account or Subaccount record. Users will only be able to view/modify documents with a Security Level less than or equal to the User Group security level assigned to the User's User Group.

Allow Document Delete (DX) – Allow Users to delete documents attached to a Customer, Master Account or Subaccount record. Users will only be able to delete documents with a Security Level less than or equal to the User Group security level assigned to the User's User Group.

Customer Items (CM) – Allow Users access to the Items tab on an existing Master Account or Subaccount record. The User is also able to add, change or delete records listed on the Master Account or Subaccount Items form.

Customer Tree View Only (CM) – Users linked to a User Group with this permission setting selected will be able to open a Customer Explorer record but will not be able to drill into the details of any transaction or setup information displayed on the Customer Explorer record.

Site Custom Fields (CM) – Allow Users access to the Custom Fields tab on an existing Site. The User is also able to enter information into any field setup for data entry on the Site Custom Fields form.

Site Documents (CM) – Allow Users to view documents attached to a Site. Users will only be able to view documents with a Security Level less than or equal to the User Group security level assigned to the User's User Group.

Site Items (CM) – Allow Users access to the Items tab on an existing Site record. The User is also able to add, change or

delete records listed on the Site Items form.

Site Transfer (CM) – Allow Users to be able to copy a site, system and documents from one Customer or Subaccount to another Customer or Subaccount.

System Custom Fields (CM) – Allow Users access to the Custom Fields tab on an existing System. The User is also able to enter information into any field setup for data entry on the System Custom Fields form.

System Documents (CM) – Allow Users to view documents attached to a System. Users will only be able to view documents with a Security Level less than or equal to the User Group security level assigned to the User's User Group.

Central Station Tracking Data (CM) – Allow Users access to information stored within any of tabs of the Central Station Tracking tab of a System record. If this permission is granted, the User will be able to add, change or delete any information contained within the Central Station Tracking forms.