



## Employee Permissions

### Permissions Tab:

Within this page you can select the employee permissions (access/functions).

**Toggle All:** By checking this box it checks all permissions within the page. After selecting the permissions remember to click the save icon (📁) located to the bottom left of the page.

Employee | Personal Information | **Permissions** | Reports Permissions | Certifications

**PERMISSIONS**  
 Toggle All

<b>Charges</b> <input type="checkbox"/> <input type="checkbox"/> Re-open Charges	<b>Dashboard</b> <input type="checkbox"/> <input type="checkbox"/> Allow GP Graph View	<b>Equipment</b> <input type="checkbox"/> <input type="checkbox"/> Force the Return of Equipment	<b>Integrations</b> <input type="checkbox"/> <input type="checkbox"/> Create Xactimate® Project	<b>Correspondence</b> <input type="checkbox"/> <input type="checkbox"/> Delete <input type="checkbox"/> Edit	<b>QBO Sync Client</b> <input type="checkbox"/> Options: <input type="checkbox"/> Edit Mapping Options: <input type="checkbox"/> Edit Mappings
<b>Utilities</b> <input type="checkbox"/> <input type="checkbox"/> Re-assign Job EST/PM <input type="checkbox"/> Re-assign WO EST	<b>Documents</b> <input type="checkbox"/> <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit	<b>Merge Templates</b> <input type="checkbox"/> <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit	<b>Inspections</b> <input type="checkbox"/> <input type="checkbox"/> Allow Review <input type="checkbox"/> Edit On Hold <input type="checkbox"/> Re-open Template	<b>XA</b> <input type="checkbox"/> <input type="checkbox"/> Enable Send Correspondence to XA <input type="checkbox"/> Enable Send Documents & Pics to XA <input type="checkbox"/> Enable XA Trans ID Entry	<b>Manager's Dashboard</b> <input type="checkbox"/> <input type="checkbox"/> Job Summary By Employee <input type="checkbox"/> Project Management Summary <input type="checkbox"/> Sales/Estimates By Employee <input type="checkbox"/> Task Performance Analytics
<b>Enterprise Accounts</b> <input type="checkbox"/> <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Limited View	<b>National Accounts</b> <input type="checkbox"/> <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Limited View	<b>Preferred Accounts</b> <input type="checkbox"/> <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Limited View	<b>Prospect Accounts</b> <input type="checkbox"/> <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Limited View	<b>Tasks</b> <input type="checkbox"/> <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Request Completed Task Notification	<b>Subs/Techs</b> <input type="checkbox"/> <input type="checkbox"/> Add <input type="checkbox"/> Change Status <input type="checkbox"/> Delete <input type="checkbox"/> Edit
<b>Loss</b> <input type="checkbox"/> <input type="checkbox"/> Add <input type="checkbox"/> Bypass Date Rules <input type="checkbox"/> Close <input type="checkbox"/> Edit <input type="checkbox"/> Sign Off	<b>Companies</b> <input type="checkbox"/> <input type="checkbox"/> Add <input type="checkbox"/> Change Status <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Limited View	<b>Consumables</b> <input type="checkbox"/> <input type="checkbox"/> Inv. Adjustment <input type="checkbox"/> Issue P.O. <input type="checkbox"/> Receive P.O. <input type="checkbox"/> Set Trigger <input type="checkbox"/> Transfer Stock <input type="checkbox"/> Void P.O.	<b>Jobs</b> <input type="checkbox"/> <input type="checkbox"/> Add <input type="checkbox"/> Change Status <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Edit Employees <input type="checkbox"/> Edit Linked Jobs <input type="checkbox"/> Move Jobs Between Sites	<b>Work Orders</b> <input type="checkbox"/> <input type="checkbox"/> Add <input type="checkbox"/> Change Date Completed <input type="checkbox"/> Change Date Due <input type="checkbox"/> Change Date of Loss <input type="checkbox"/> Change Date Received <input type="checkbox"/> Close <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Require Action Taken Field <input type="checkbox"/> Require Area Field <input type="checkbox"/> Require Determination Field <input type="checkbox"/> Sign Off	<b>Report Printing</b> <input type="checkbox"/> <input type="checkbox"/> Companies <input type="checkbox"/> Contacts <input type="checkbox"/> Dashboard <input type="checkbox"/> Equipment/Consumables <input type="checkbox"/> Field Report <input type="checkbox"/> Job Contacts <input type="checkbox"/> Jobs <input type="checkbox"/> Losses <input type="checkbox"/> Sales Route <input type="checkbox"/> Schedules <input type="checkbox"/> Sub/Tech <input type="checkbox"/> Sub/Tech Contacts <input type="checkbox"/> Tasks

**Job Costs**

Actual:  
 Add  Delete  Edit

Budget:  
 Add  Delete  Edit

Collections:  
 Add  Delete  Edit

Estimates:  
 Add  Delete  Edit

Invoiced:  
 Add  Delete  Edit

Allow Removing Xactimate Estimate  
 Create Estimate Invoice  
 Viewable



Updated By on



## Employee Permissions

### Permission Descriptions:

#### Charges

- **Re-open Charges:** *by checking this box the employee can re-open WO charges.*

#### Dashboard

- **Allow GP Graph View:** *by checking this box the employee can view GP% on the Gross Profit Performance Dashboard panel. This permission is only applicable when the Dashboard is set to the Production view.*

#### Equipment

- **Force the Return of Equipment:** *by checking this box the employee will be able to "force" the return of equipment that sometimes gets in a "stuck" state.*

#### Integrations

- **Create Xactimate® Project:** *by checking this box the employee will be able to use the Send Job to Xactimate function which creates the Project in Xactimate.*

#### Correspondence

- **Delete:** *by checking this box the employee will be able to delete ANY correspondence record.*
- **Edit:** *by checking this box the employee will be able to edit ANY correspondence record.*  
*Note: All employees have permission to add correspondence notes.*

#### QBO Sync Client

- **Options:** *by checking this box the employee will have the ability to make/adjust selections within the QBO Sync Client Options page. If this is unchecked the page is viewable only.*
- **Mapping Options:** *by checking this box the employee will have the ability to complete mapping, edit mapping, and remove mapping within the QBO Sync Client Mapping Options page. If this is unchecked the page is viewable only.*

#### Utilities

- **Re-Assign Job EST/PM:** *by checking this box the employee will have access to do a mass reassignment of the Estimator or PM assigned to a Job.*
- **Re-Assign WO EST:** *by checking this box the employee will have access to do a mass reassignment of the Estimator or PM assigned to a Work Order.*

#### Documents

- **Add:** *by checking this box the employee can add Documents to the Job, Company or Sub/Tech records.*
- **Delete:** *by checking this box the employee can delete ANY Document associated with a Job, Company or Sub/Tech record.*
- **Edit:** *by checking this box the employee can edit and document associated with a Job, Company or Sub/Tech record. If this is not checked and the add permission is checked, they still will not be able to add a new document.*

#### Merge Templates (Email & Text Templates)

- **Add:** *by checking this box an employee with a Login Type of Power User or User can add Email and/or Text Templates.*
- **Delete:** *by checking this box an employee with a Login Type of Power User or User can delete ANY Email and/or Text Template.*
- **Edit:** *by checking this box an employee with a Login Type of Power User or User can edit ANY Email and/or Text Template.*



## Employee Permissions

### Inspections

- **Allow Review:** *by checking the employee will have the ability to review an Inspection in .NET.*
- **Edit On Hold:** *by checking this box the employee will have the ability to uncheck the On Hold .NET at the job level.*
- **Re-open Template:** *by checking this box the employee will have the ability to re-open a closed inspection in .NET at the job level.*

### XA

- **Enable Send Correspondence to XA:** *by checking this box the employee will have the ability to send correspondence notes to XactAnalysis (XA).*
- **Enable Send Documents & Pics to XA:** *by checking this box the employee will have the ability to send documents and pictures to XactAnalysis (XA).*
- **Enable XA Trans ID Entry:** *by checking this box the employee will have the ability to apply or remove the XactAnalysis (XA) Trans ID number.*

### Manager's Dashboard

- **Job Summary By Employee:** *by checking this box the employee has access to the Job Summary Dashboard.*
- **Project Management Summary:** *by checking this box the employee has access to the Sales/Estimates Dashboard.*
- **Sales/Estimates By Employee:** *by checking this box the employee has access to the Sales/Estimates Dashboard.*
- **Task Performance Analytics:** *by checking this box the employee has access to the Sales/Estimates Dashboard.*

Home
Tasks
Work In Progress
Jobs
WO/Office Performance
Loss/WO Summary
Gross Profit Performance
Accounting and Budgeting
Equipment Summary
Sales
Inspections
Job Summary
Company Management
Task Performance



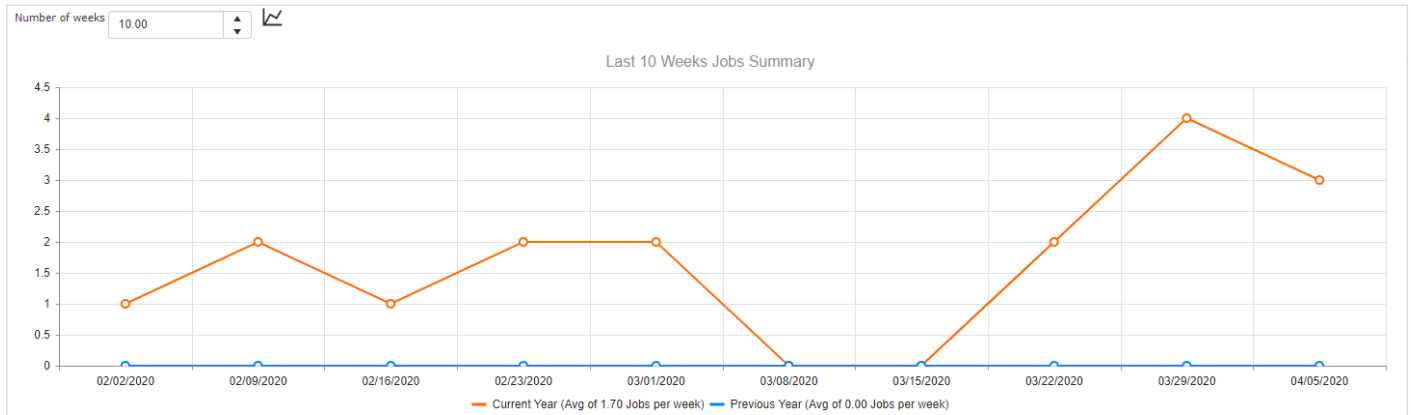
## Employee Permissions

Example of the Job Summary Dashboard:

Job Summary by Employee (i)

Select Employee:  (max 8 employees) Employee Type:  All

Progress	All	Project Manager	Call Taker
New Lead/Job	3	3	3
Customer Contacted	10	9	10
Inspection Scheduled	1	1	0
Estimate Uploaded	1	1	1
Estimate Approved	0	0	0
WA/Contract Signed	3	3	3



Example of the Company Management Dashboard:

## Company Management Summary

Progress:  Employee Type:  Employee:

Save Grid Search Preferences? (uncheck for defaults)

Employee	Total # of Jobs	Total Estimate	Average Estimate	Total Budget	Total Actual Expenses	Over/Under Budget %	% On Time	Total Tasks
Dawn Bryant	10	\$0.00	\$0.00		\$0.00			6

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# of WOs	Company	Address	Total Estimate	Total Budget	Total Actual Expenses	Over/Under Budget %	% On Time	Total Task
0	*Jacksonville Property Mgmt	124 9th 1st Street, Unit 125, Jax Beach, FL 32250	\$0.00		\$0.00			0
0	Dawn's Rockin' Agency	369 3rd Street, Jax Beach, FL 32250	\$0.00		\$0.00			1
0	USAA	141 Dolphin Avenue, Jax Beach, FL 32250	\$0.00		\$0.00			1
0	Self-Pay (Non-Insurance Claim)	12450 North Meridian Street, Carmel, IN 46032	\$0.00		\$0.00			1

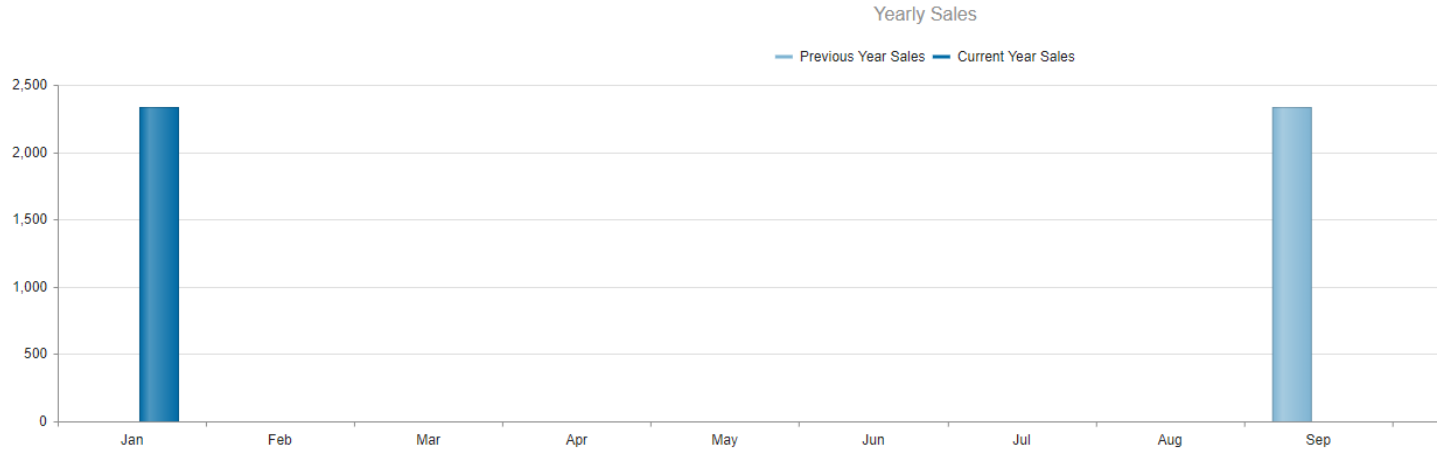


## Employee Permissions

### Example of the Sales Dashboard:

#### Sales/Estimates

Viewable By:  All Data  My Data



#### Current Year Summary

**\$2,331.58**

Sales YTD

**\$1,450,000.00**

Yearly Goal

**\$131,095.89**

Goal YTD

**1.77 %**

Projected % of Goal

**\$25,788.69**

12 Month Sales Trend

### Example of the Task Performance Dashboard:

#### Task Performance Analytics

Employee:  Office:  Company:

Date Range:

Task Name	Total Tasks	Total Open	Total Tasks Overdue	% On Time	% Of Tasks	Avg Days to Complete	Avg Days Overdue
COS Form	5	0	0	0	50	1	0
Survey	5	0	0	100	50	1	0

### Enterprise, National, Preferred and Prospect Accounts

**Important:** Account permissions ONLY apply if Company Accounts are setup.

- **Add:** by checking this box the employee can add the account to a company record.
- **Delete:** by checking this box the employee can delete ANY Company record.
- **Edit:** by checking this box the employee can edit the company record. If this permission is not checked Save at the bottom of the record is greyed out, anything they add to the record such as address, email address, phone number, etc. cannot be saved.
- **Limited View:** by checking this box the employee can't open the record with a specified account. They are not able to view the company details, such as address, company type, etc. nor can they access any contact records associated with the company.

#### Tasks

- **Add:** by checking this box the employee will be able to add a Task.
- **Delete:** by checking this box the employee will be able to delete ANY Task.
- **Edit:** by checking this box the employee will be able to edit ANY Task.
- **Request Completed Task Notification:** by checking this box the employee will receive completed Task email notification.



## Employee Permissions

### Subs/Techs

- **Add:** by checking this box the employee will be able to add a Sub/Tech record.
- **Change Status:** by checking this box the employee can change the status from Active to Inactive.
- **Delete:** by checking this box the employee will be able to delete ANY Sub/Tech record.
- **Edit:** by checking this box the employee can edit the Sub/Tech record. If this permission is not checked Save at the bottom of the record is greyed out, anything they add to the record such as an address, email address, phone number, etc. cannot be saved.

### Loss (Example: Water, Fire, Structural Repairs, etc.)

- **Add:** by checking this box the employee can apply the Loss to a Lead/Job.
- **Bypass Date Rules:** by checking this box the employee will be able to bypass the date rules defined by the administrator.
- **Close:** by checking this box the employee will be able to close the Loss.
- **Delete:** by checking this box the employee will be able to delete any Loss applied to the Lead/Job.
- **Edit:** by checking this box the employee can change the Loss applied to the Lead/Job.
- **Sign Off:** by checking this box the employee can get the customers signature on the Loss using IM ONLY.

### Companies

- **Add:** by checking this box the employee will be able to add a new Company.
- **Change Status:** by checking this box the employee can change the status from Active to Inactive.
- **Delete:** by checking this box the employee will be able to delete ANY Company record.
- **Edit:** by checking this box the employee can edit ANY Company record. If this permission is not checked Save at the bottom of the record is greyed out, anything they add to the record such as an address, email address, phone number, etc. cannot be saved.
- **Limited View:** by checking this box the employee can't open a Company record. They are not able to view the company details, such as address, company type, etc. nor can they access any contact records associated with the company.

### Consumables

- **Inv. Adjustment:** by checking this box the employee will be able to adjust Inventory.
- **Issue P.O.:** by checking this box the employee can issue a P.O. to order consumables.
- **Receive P.O.:** by checking this box the employee will be able to receive a P.O. for consumables.
- **Set Trigger:** by checking this box the employee can set a trigger point to re-order consumables.
- **Transfer Stock:** by checking this box the employee will be able to transfer the consumables stock.
- **Void P.O.:** by checking this box the employee will be able to void a P.O. issued to order consumables.

### Jobs

- **Add:** by checking this box the employee will be able to add a new Job.
- **Change Status:** by checking this box the employee can change the status from Active to Inactive.
- **Delete:** by checking this box the employee will be able to delete ANY Job.
- **Edit:** by checking this box the employee can edit ANY Job record. If this permission is not checked Save at the bottom of the job is greyed out, anything they add to the job such as a Claim #, etc. cannot be saved.
- **Edit Employees:** by checking this box the employee can edit employees assigned to the job such as Estimator, PM, etc.
- **Edit Linked Jobs:** by checking this box the employee will be able to link jobs.
- **Move Jobs Between Sites:** by checking this box the employee can move the Job to another Office (Location, Site, Division).



## Employee Permissions

### WOs (WOs abbreviation for Work Orders)

- **Add:** by checking this box the employee can a WO.
- **Change Date Completed:** by checking this box the employee can change/adjust the date the WO was completed.
- **Change Date Due:** by checking this box the employee can change/adjust the Due Date on the WO.
- **Change Date Received:** by checking this box the employee can change/adjust the Rcvd Date on a WO.
- **Change Date of Loss:** by checking this box the employee can change/adjust the DOL Date on a WO.

WO Progress:	Work Completed	Date of Loss:	02/08/2021
WO Status:	Open	Date Received:	02/12/2021
Date Completed:		Date Due:	02/15/2021

- **Close:** by checking this box the employee can update the status on the WO.
- **Delete:** by checking this box the employee can delete ANY WO.
- **Edit:** by checking this box the employee can edit ANY WO.
- **Require Action Taken Field:** by checking this box Action Taken (Work Order note ONLY) is required and the employee is not able to click Save until something has been added in Action Taken.
- **Require Area Field:** by checking this box Area is a required field and the employee is not able to click Save until Area has been applied.
- **Require Determination Field:** by checking this box Determination is a required field.
- **Sign Off:** by checking this box the employee can get a sign off on a WO in .NET and IM.

### Report Printing

Companies, Contacts, Dashboard, Equipment/Consumables, Field Report, Job Contacts, Jobs, Losses, Sales Route, Schedules, Sub/Tech, Sub/Tech Contacts, and Tasks Pages.

- by checking the box next to one of the specified pages the employee will have the ability to generate a report or export data from the page.

### Example View Jobs Page report icons

View Jobs

Job #	Job Name	Pri Job Contact Name	Job Address	Date Received	Progress	Loss Type	Company	Claim #	Deductible	Estimate	Actual E
2021-INTERNAL	AFTER HOURS	AFTER HOURS	7991 Shaffer Parkway, Suite 300, Littleton, CO 80127	01/01/2021	Job/Work on Hold	INTERNAL	AFTER HOURS		NA	\$0.00	\$0.00
21-9901-RCN	Starbucks	Starbucks	975 3rd St S, Jacksonville Beach, FL 32250	01/08/2021	In Production	Reconstruction	Oceanside Insurance	005662742-010	500.00	\$16,474.47	\$0.00
21-9902-WTB	John Ross	John Ross	611 Ponte Vedra Lakes Blvd, Ponte Vedra Beach, FL 32082	02/08/2021	Paid in Full - File Closed	Water	Previous Residential		\$500	\$0.00	\$1,000.00
21-9903-REM	Dunkin Donuts	Dunkin Donuts	1662 NE Pine Island Rd, Cape Coral, FL 33909	02/12/2021	WA/Contract Signed	Remodeling	Jacksonville Prosech Most		NA	\$3,796.03	\$48.00

### Job Costs

- **Actual:**
    - **Add:** by checking this box the employee can manually enter actual costs.
    - **Edit:** by checking this box the employee can edit an existing manually entered actual cost.
    - **Delete:** by checking this box the employee can delete an existing manually entered actual cost.
  - **Budget:**
    - **Add:** by checking this box the employee can apply the budget to a job.
    - **Edit:** by checking this box the employee can edit an existing budget on a job.
    - **Delete:** by checking this box the employee can delete an existing budget on a job.
- Note:** To use the Override Budget button Edit Budget must be checked.



## Employee Permissions

- **Collections:**
  - **Add:** *by checking this box the employee can manually enter payments received.*
  - **Edit:** *by checking this box the employee can edit a manually entered payment.*
  - **Delete:** *by checking this box the employee can delete a manually entered payment.*
- **Estimates:**
  - **Add:** *by checking this box the employee can manually enter an estimate.*
  - **Edit:** *by checking this box the employee can edit a manually entered estimate.*
  - **Delete:** *by checking this box the employee can delete a manually entered estimate.*
- **Invoiced:**
  - **Add:** *by checking this box the employee can manually enter an invoice amount.*
  - **Edit:** *by checking this box the employee can edit a manually entered invoice amount.*
  - **Delete:** *by checking this box the employee can delete a manually entered invoice amount.*
- **Allow Removing Xactimate Estimate:** *by checking this box the employee will have the ability to remove the uploaded Xactimate Estimate from the Job.*
- **Create Estimate Invoice:** *by checking this box the employee will have the ability to create an Estimate Invoice.*
- **Viewable:** *by checking this box, the employee can view job financials (costs) such as the Estimate, Budget, Actual Costs, Invoices and Payments Received.*