

Reference To “Group” Functions

This reference document will detail what functions and restrictions are dictated by each of the PIMS-X Passwording Groups.

This includes functions associated with each Menu Item in PIMS-X as well as record and screen level restrictions and options.

Based On PIMS-X Version 10.0.5.6

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The following is a reference to each Menu Item in PIMS-X, including all current Modules (both included and optional).

Please note that the “Administrator” User has access to all functions in PIMS-X.

MENU/ITEM: **PASSWORD GROUP**

Main PIMS-X Splash Screen:

File

PIMS Preferences.....MODIFY PREFERENCES
 Other Menus All Users

**** INSTALLED MODULES****

EDC Accounting..... ACCOUNTING MODULE
 Calendar ModuleCALENDAR MODULE
 Import\ExportIMPORT-EXPORT MODULE
 Forms Designer ModuleFORMS DESIGNER MODULE

**** ADDITIONAL MODULES****

Assembly Module ASSEMBLY MODULE
 Service & Repair Module SERVICE-REPAIR MODULE
 Locations Module.....LOCATIONS MODULE
 WEB Services Module WEB SERVICES MODULE
 Subscription Module SUBSCRIPTION MODULE

Master Applicator MASTER APPLICATOR

** Also requires a “Daily Pass” number from ExecUtron Development Corp.

Check Giftcard BalanceCHECK GIFT CARD
 Open Cash Drawer All Users
 Reset Receipt Monitor Window All Users
 Change User Access All Users
 Logout Of System..... All Users
 Change Passwording.....TOTAL_ACCESS
 Current System PermissionsTOTAL_ACCESS
 Update ExecULock Remotely.....TOTAL_ACCESS
 Load And Run Plug-In..... RUN PLUG-INS

** “Startup” style of plug-ins will load and run regardless of Passwording...

Current Version History..... All Users
 Check For PIMS Updates UTILITIES
 4D Preferences.....TOTAL_ACCESS

Current Backup Stats.....	UTILITIES
Analyse Locked Record.....	All Users
Available Training Videos	All Users
Quit.....	All Users

Inventory

Add New Product Record	ADD INVENTORY
List All Inventory.....	INVENTORY
Quick Find.....	INVENTORY
List Today's Modified	INVENTORY
List By Date Modified.....	INVENTORY
Keyword Search	INVENTORY
Search Editor	INVENTORY
Search Form.....	INVENTORY
List By Posted Date Range.....	INVENTORY
Find Locked Records.....	INVENTORY
List Discontinued Items.....	INVENTORY
List PRICE Less Than BOOKCOST	INVENTORY
Find By Record#.....	INVENTORY
List All Bundle Records.....	INVENTORY
List All Kit Records.....	INVENTORY
List All Component Records	INVENTORY
List All "Bulk" Items	INVENTORY
List All "Associated" Items.....	INVENTORY
List "No Post Adjust" Items	INVENTORY
All Records With Components.....	INVENTORY
List Ready To Sync.....	INVENTORY
List Ready For WEB Update.....	INVENTORY
List "OK To Show On WEB"	INVENTORY
Custom Graph	INVENTORY
Simple Labels	INVENTORY
Price Look-Up.....	INVENTORY
SKU Matrix Generator	ADD INVENTORY
Change Next Automatic Code	UTILITIES

Vendors

Add New Vendor.....	ADD VENDOR
List All Vendors	VENDORS
Quick Find.....	VENDORS
Search Editor	VENDORS
List Today's Modified	VENDORS
Keyword Search	VENDORS
Change Next Automatic Code	UTILITIES

Cate/Depts

** Categories:

Add New Category/Sub-Category	ADD CATEGORY
List All Categories	CATEGORIES
List Today's Modified	CATEGORIES
Search Editor	CATEGORIES
List Ready To Sync	CATEGORIES

** Departments:

Add Department.....	ADD DEPT
List All Departments.....	DEPARTMENTS
List Today's Modified	DEPARTMENTS
Search Editor	DEPARTMENTS

** Family Discounts

Add Family.....	ADD FAMILY
List All Families.....	FAMILIES
List Today's Modified	FAMILIES
Search Editor	FAMILIES

Orders

Create New Order.....	CREATE ORDER
Start POS Terminal	CREATE ORDER
Import On-Line Orders.....	UTILITIES
List Unprocessed Imports	ORDERS
List All Orders	ORDERS
Quick Find.....	ORDERS
Search Editor	ORDERS
Find Orders By Line Items	ORDERS
View Last Order	ORDERS
Orders In Need Of Validation.....	ORDERS
List Orders By Date Range.....	ORDERS
List Today's Invoices	ORDERS
List Yesterday's Invoices.....	ORDERS
List Un-Shipped Invoices	ORDERS
List By Modified Date.....	ORDERS
List All Invoices	ORDERS
List All Salesorders	ORDERS
List All Quotes	ORDERS
List All Worksheets	ORDERS
List All Voided Orders	ORDERS
List "Blanks Code" Orders	ORDERS
Find Order By Serial#	ORDERS
Find Orders By Lot#.....	ORDERS
Find Orders With Product#	ORDERS
Find By Product Category.....	ORDERS
Find By Customer\Item	ORDERS

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Find Orders By Salesperson.....	ORDERS
Find Orders By Customer.....	ORDERS
Find Posted Inv. By S\L Acct.....	CHART-OF-ACCOUNTS
Find Orders By Reference#.....	ORDERS
List Failed Post Invoices.....	ORDERS
Orders With Backorder Needs.....	ORDERS
Custom Graph.....	ORDERS
Simple Labels.....	ORDERS
List Ready To Sync.....	ORDERS
Change Next Order Number.....	UTILITIES

P.O.

Create New Purchase Order.....	CREATE_NEW_PO
Product Purchase Worksheet.....	CREATE_NEW_PO
List All Purchase Orders.....	PURCHASING
View Last P.O.	PURCHASING
Find By P.O. Number.....	PURCHASING
List Today's Modified.....	PURCHASING
List By Date Range.....	PURCHASING
Search Editor.....	PURCHASING
List All Un-Processed P.O.s.....	PURCHASING
List All OPEN Purchase Orders.....	PURCHASING
List All CLOSED Purchase Orders.....	PURCHASING
List No-Received P.O.s.....	PURCHASING
List Partially Received P.O.s.....	PURCHASING
Find P.O.s By Part Code.....	PURCHASING
Find P.O.s By Vendor.....	PURCHASING

** Vendor Reconciliations (Forth Page Of P.O. Entry Screen):

List Reconciled P.O.s.....	VENDOR RECONCILIATION
List Un-Reconciled P.O.s.....	VENDOR RECONCILIATION
List Partially Reconciled P.O.s.....	VENDOR RECONCILIATION

Change Next P.O. Number.....	UTILITIES
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Receiving

Create New Receiving Order.....	ADD RECEIVING
List All Receiving Records.....	RECEIVING
View Last Receiving Record.....	RECEIVING
List Today's Modified.....	RECEIVING
List By Date Range.....	RECEIVING
Search Editor.....	RECEIVING
Find Record By Part Code.....	RECEIVING
List All Un-Posted Records.....	RECEIVING

**** Inventory Transfers:**

Create New Product Transfer	ADD INVENTORY TRANSFER
List All Transfers	INVENTORY TRANSFER
Search Editor	INVENTORY TRANSFER
List All Posted Transfers	INVENTORY TRANSFER
List All Un-Posted Transfers	INVENTORY TRANSFER
List Outstanding Transfers.....	INVENTORY TRANSFER

RMAS

Create New Vendor RMA.....	ADD RMA
List All Vendor RMAs	RMAs
Find By RMA#.....	RMAs
Search Editor	RMAs
List Today's Modified	RMAs
List By Date Range.....	RMAs
List Un-Posted RMAs	RMAs
List Outstanding RMAs	RMAs

Empl.

Add New Employee	ADD EMPLOYEE
List All Employees.....	EMPLOYEES
List Today's Modified	EMPLOYEES
Search Editor	EMPLOYEES
To-Do List.....	CALENDAR MODULE
View Employee Calendar	CALENDAR MODULE
Set Auto Fill Employee Code	All Users

Customers

Add New Customer Record	ADD CUSTOMER
Process Customer Prepayment.....	ACCEPT_PREPAYMENT
List All Records	CUSTOMERS
Quick Find.....	CUSTOMERS
View Last Customer.....	CUSTOMERS
List Today's Modified	CUSTOMERS
List By Date Range.....	CUSTOMERS
Keyword Search	CUSTOMERS
Search Editor	CUSTOMERS
Find Phonetically	CUSTOMERS
Find By E-Mail	CUSTOMERS
List "Prospects" Only	CUSTOMERS
List "Customers" Only	CUSTOMERS
List All Business Customers	CUSTOMERS
List all Individual Customers	CUSTOMERS
List All "Disallow Sale"	CUSTOMERS
Find By "Price Code"	CUSTOMERS
Find By Customer "Type"	CUSTOMERS

Find By "Marketing Group"	CUSTOMERS
List All "Commission Exempt"	CUSTOMERS
Find By Birthday Coming-Up	CUSTOMERS
List Top Customers	CUSTOMERS
List Not Purchased Since	CUSTOMERS
List Have Purchased Since.....	CUSTOMERS
Process Customer Contacts	CUSTOMERS
List Ready To Sinc	CUSTOMERS
Custom Graph	CUSTOMERS
Simple Labels	CUSTOMERS
Change Next Automatic Code	UTILITIES
Change Next Case Number Code	UTILITIES

Reports

Daily Transactions Report.....	DAILY TRANS REPORT
Daily Snap-Shot.....	DAILY TRANS REPORT
Print Z-Tape	Z_TAPE
Items Held Report.....	GENERAL REPORTING
Total Sales Graph	GENERAL REPORTING
Specific Item's Sales.....	GENERAL REPORTING
All Product Sales	GENERAL REPORTING
Category Sales Report	GENERAL REPORTING
Returned Product Report.....	GENERAL REPORTING
Who Bought This Product.....	GENERAL REPORTING
Stock Value By Category	GENERAL REPORTING
Sales Margin Report.....	GENERAL REPORTING
Choose Other Reports (and all that make that up).....	GENERAL REPORTING

"Other Menus" Splash Screen:

Pay'Types

Add Payment Type Record.....	ADD PAYMENT TYPE
List All Payment Types.....	PAYMENT TYPES
List Ready To Sync	PAYMENT TYPES
List All Cards Run	VIEW_CC_INFO

Shippers

Create New Shipper	ADD SHIPPER
List All Shippers	SHIPPERS
List Ready To Sync	SHIPPERS

Cards

List All Cards.....	GIFT CARDS
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List Loyalty Cards Only.....	GIFT CARDS
List Gift Cards Only.....	GIFT CARDS
Batch Create Gift Cards.....	GIFT CARDS
Pre-Process Existing Numbers.....	UTILITIES
Find Orders Paid By Giftcard.....	ORDERS
Find Order That Sold Giftcard.....	ORDERS

Marketing

Add New Marketing Event.....	All Users
List All Marketing Events.....	All Users
Search Editor.....	All Users

Counties (Tax Jurisdictions)

Add New Tax Jurisdiction.....	ACCOUNTING MODULE
List All Jurisdictions.....	ACCOUNTING MODULE

Jobs

Add New Job Record.....	ADD JOB
List All Jobs.....	JOBS
Search Editor.....	JOBS

Lot#s

Add New Lot Number.....	ADD LOT
List All Lot Numbers.....	LOTS
Search Editor.....	LOTS

Serial#s

Add New Serial Number.....	ADD SERIAL NUMBER
List All Serial Numbers.....	SERIAL NUMBERS
Find By Serial##.....	SERIAL NUMBERS
List By Date Modified.....	SERIAL NUMBERS
Search Editor.....	SERIAL NUMBERS

Inv't' Recon (Inventory Reconciliations)

Add Inventory Reconciliation.....	INVENTORY RECONCILIATION
List All Reconciliations.....	INVENTORY RECONCILIATION
Search Editor.....	INVENTORY RECONCILIATION
Inventory Tally Sheet.....	INVENTORY
HELD Item Report.....	GENERAL REPORTING

EDC Accounting Module:

**Requires "Accounting Module" Group to access this Module...

File

Accounting Preferences.....	MODIFY PREFERENCES
Change User Access	All Users
Logout Of System	All Users
Load And Run Plug-In.....	RUN PLUG-INS
Return To Main Menu	All Users
Quit	All Users

Functions

Close A Period	CLOSE A PERIOD
Closing Entry Report.....	CLOSE A PERIOD
Post Un-Posted Invoices	POST INVOICES
Check For Server Posting Errors.....	POST INVOICES
List Invoices Needing Posting.....	ORDERS
List All Un-Posted To Inventory.....	ORDERS
List All Un-Posted To G/L.....	ORDERS
List Partially Posted Invoices	ORDERS
List Invoices By Posted Date	ORDERS
List Invoices With Fatal Posts.....	ORDERS
List Invoices With Locked Posts	ORDERS
Open Up Area 51	TOTAL_ACCESS
Look For Large Decimals.....	ACCOUNTING MODULE
Year-End Updater	TOTAL_ACCESS

G/L

Add New Chart-Of-Account	CHART-OF-ACCOUNTS
List All Chart-Of-Accounts.....	CHART-OF-ACCOUNTS
Quick Find.....	CHART-OF-ACCOUNTS
List Today's Modified	CHART-OF-ACCOUNTS
Search Editor	CHART-OF-ACCOUNTS
Make A G/L Journal Entry	GENERAL JOURNAL
List All G/L Journal Entries.....	GENERAL JOURNAL
List This Period Activity.....	GENERAL JOURNAL
List By Date Range.....	GENERAL JOURNAL
Find By Reference#	GENERAL JOURNAL
Search Editor	GENERAL JOURNAL
Current Trial Balance	GENERAL JOURNAL
Past Trial Balance.....	GENERAL JOURNAL
Trace A Dollar Amount.....	GENERAL JOURNAL
Account Activity By Date.....	GENERAL JOURNAL
Account Activity By Period	GENERAL JOURNAL

Export Entire GL By Period.....	GENERAL JOURNAL
Export Entire GL By Period.....	GENERAL JOURNAL
Find A Bogus GL Date	GENERAL JOURNAL

A/R

Find A Customer Record.....	CUSTOMERS
List A/R Balances.....	ACCOUNTS RECEIVABLE
Historical A/R Balances	ACCOUNTS RECEIVABLE
List Credit Balances.....	ACCOUNTS RECEIVABLE
List And A/R Credits.....	ACCOUNTS RECEIVABLE
Process Customer Payment.....	ACCOUNTS RECEIVABLE
List All Payments	ACCOUNTS RECEIVABLE
List Payments By Date Range.....	ACCOUNTS RECEIVABLE
List Balances That "Wash"	ACCOUNTS RECEIVABLE
List All For Specific Customer.....	ACCOUNTS RECEIVABLE
Payment Search Editor.....	ACCOUNTS RECEIVABLE
Manually Age Receivables.....	ACCOUNTS RECEIVABLE
Manually Apply Finance Charges	APPLY FINANCE CHARGES
Print Statements	PRINT STATEMENTS

A/P

Find A Vendor Record.....	VENDORS
List A/P Aging Report.....	ACCOUNTS PAYABLE
Historical A/P Balances.....	ACCOUNTS PAYABLE
List Credit Balances.....	ACCOUNTS PAYABLE
List Any A/P Credits	ACCOUNTS PAYABLE
Manually Age Vendors.....	ACCOUNTS PAYABLE
Make A Vendor Payment	WRITE CHECKS
List Vendors We Owe	WRITE CHECKS
List Transactions Due By Date	WRITE CHECKS
List Discounts Due By.....	WRITE CHECKS
List Balances That "Wash"	WRITE CHECKS
List Payments By Date Range.....	ACCOUNTS PAYABLE
Specific Vendor's Payments.....	ACCOUNTS PAYABLE
Payment Search Editor.....	ACCOUNTS PAYABLE
Make A Manual Purchase.....	PURCHASE JOURNAL
List Purchases By Date Range.....	PURCHASE JOURNAL
Specific Vendor's Purchases	PURCHASE JOURNAL
Purchases Search Editor	PURCHASE JOURNAL
Add New Recurring Expense.....	RECURRING EXPENSES
List All Recurring Expenses.....	RECURRING EXPENSES
Search Editor.....	RECURRING EXPENSES
List By "Mail-On" Date	RECURRING EXPENSES
Post Auto-Payables	RECURRING EXPENSES

Checking

Set-Up New Bank Record.....	CHECKING
List All Bank Records.....	CHECKING
Process Funds Transfer.....	WRITE CHECKS
Process Returned Check.....	CHECKING
Write A Check - Non A/P.....	WRITE CHECKS
List All Checks.....	CHECKING
Find By Check#.....	CHECKING
Check Search Editor.....	CHECKING
List By Date Range.....	CHECKING
List Un-Printed Checks.....	CHECKING
Make A Deposit.....	MAKE DEPOSIT
List All Deposits.....	CHECKING
List By Date Range.....	CHECKING
Deposit Search Editor.....	CHECKING
Display Check Register.....	CHECKING
Register Search Editor.....	CHECKING
List By Date Range.....	CHECKING
Find By Dollar Amount.....	CHECKING
Reconcile New Bank Statement.....	BANK RECONCILIATION
List All Reconciliations.....	BANK RECONCILIATION
List By Date Range.....	BANK RECONCILIATION

I/O

Import Payroll.....	IMPORT PAYROLL
Export 1099 Vendor Checks.....	VENDORS
Import General Ledger.....	TOTAL_ACCESS
Import Customer A/R.....	TOTAL_ACCESS
Import Vendor A/P.....	TOTAL_ACCESS

Reports

Daily Report.....	DAILY TRANS REPORT
Daily Snap-Shot.....	DAILY TRANS REPORT
Inventory Holding Report.....	ACCOUNTING REPORTS
Current Trial Balance.....	ACCOUNTING REPORTS
Past Trial Balance.....	ACCOUNTING REPORTS
Trace A Dollar Amount.....	ACCOUNTING REPORTS
Account Activity By Date.....	ACCOUNTING REPORTS
Account Activity By Period.....	ACCOUNTING REPORTS
Export Entire GL By Period.....	ACCOUNTING REPORTS
Income Statement (P&L).....	ACCOUNTING REPORTS
Balance Sheet.....	ACCOUNTING REPORTS
Budget Report For Month.....	BUDGETING
Yearly Account Activity.....	ACCOUNTING REPORTS
Choose Other Reports.....	ACCOUNTING REPORTS

Calendar Module:

** Requires "Calendar Module" Group to access this Module.

** No additional Passwording beyond "Calendar Module".

Import\Export Module:

**Requires "Import-Export Module" Group to access this Module...

File

Load And Run Plug-In..... RUN PLUG-INS

-> Import

Import PIMS Records IMPORT_DATA

Import ASCII Text..... IMPORT_DATA

Export ->

Export PIMS Records EXPORT INFORMATION

Export Data Text File EXPORT INFORMATION

Special

Import Customer Locations..... IMPORT_DATA

Export Template..... N/A

Update Allocation Item Names IMPORT_DATA

Import Location On-Hands..... IMPORT_DATA

PIMS-Classic

Import From PIMS-Classic..... TOTAL_ACCESS

Import Classic SROs TOTAL_ACCESS

Import Classic Workorders TOTAL_ACCESS

Import PM Detail..... TOTAL_ACCESS

Import Classic Jobs TOTAL_ACCESS

Import Classic RMAs TOTAL_ACCESS

Import More Purchase Orders TOTAL_ACCESS

Import Classic ICM Data..... TOTAL_ACCESS

Import Selected Classic Orders..... IMPORT_DATA

Old ICM-Sync

Classic Data-Sync Preferences MODIFY PREFERENCES

Stop Waiting For Classic Orders IMPORT-EXPORT MODULE

How Many Un-Sent Orders?..... IMPORT-EXPORT MODULE

Force ICM Orders To Send..... IMPORT-EXPORT MODULE

Send Updated Records To ICM IMPORT-EXPORT MODULE

Forms Designer Module:

**Requires "Forms Designer Module" Group to access this Module...

File

- Forms Designer Preferences.....MODIFY PREFERENCES
- Load And Run Plug-Ins.....RUN PLUG-INS

Templates

- Create New TemplateFORMS DESIGNER MODULE
- List All TemplatesFORMS DESIGNER MODULE

Screens

- Customer User ScreenFORMS DESIGNER MODULE
- Customer User Field NamesTOTAL_ACCESS
- Inventory User Screen.....FORMS DESIGNER MODULE
- Inventory User Field NamesTOTAL_ACCESS
- Reset All Custom Field NamesTOTAL_ACCESS
- Back-up 4DA FileTOTAL_ACCESS
- Restore 4DA File.....TOTAL_ACCESS
- Clear 4DA BackupTOTAL_ACCESS
- Show 4DA File Location.....FORMS DESIGNER MODULE

Assembly Module:

**Requires "Assembly Module" Group to access this Module...

File

- MFG PreferencesMODIFY PREFERENCES
- Change Next W.O. Number ASSEMBLY MODULE
- Load And Run Plug-Ins.....RUN PLUG-INS

Workorders

- Create New Workorder CREATE WORKORDER
- List All Workorders..... ASSEMBLY MODULE
- Find By Create Date Range..... ASSEMBLY MODULE
- Search Editor ASSEMBLY MODULE
- List All W.O. In Progress ASSEMBLY MODULE
- List All Not In Progress ASSEMBLY MODULE
- List All Completed W.O..... ASSEMBLY MODULE
- Find By Scheduled Completion ASSEMBLY MODULE
- Find By Workorder#..... ASSEMBLY MODULE
- Find By Product# ASSEMBLY MODULE
- Find By Customer..... ASSEMBLY MODULE

Find By Order#	ASSEMBLY MODULE
Find By Specific Stage.....	ASSEMBLY MODULE
Find By Percent Done.....	ASSEMBLY MODULE
Update Workorder Stage	ASSEMBLY MODULE

Calculators

How Many "X" Can We Make	ASSEMBLY MODULE
When "X" Changes In Cost.....	ASSEMBLY MODULE
Components Needed For Build	ASSEMBLY MODULE

Lists

What Products Contain "X"	ASSEMBLY MODULE
List Components Of "X"	ASSEMBLY MODULE
List All Items With Components	ASSEMBLY MODULE
List All "Sub-Assembly" Items	ASSEMBLY MODULE
List All "Cost-Assembly" Items	ASSEMBLY MODULE
List Finished Products	ASSEMBLY MODULE
First Level Component Listing	ASSEMBLY MODULE
Quick Find Inventory Item.....	INVENTORY

Serial'Numbers

Manually Add Serial#	ASSEMBLY MODULE
List All Serial Numbers.....	ASSEMBLY MODULE
Find By Serial#	ASSEMBLY MODULE
List By Date Modified.....	ASSEMBLY MODULE
Search Editor	ASSEMBLY MODULE
Consolidate FP\CMP Serial#s	ASSEMBLY MODULE
List A Product's CMP Serial#s	ASSEMBLY MODULE

Labels

Create New Template	ASSEMBLY MODULE
List All Templates	ASSEMBLY MODULE

I\O

Import Usage History	IMPORT_DATA
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Reports

Choose Other Reports.....	MFG REPORTS
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Service & Repair Module:

**Requires "Service-Repair Module" Group to access this Module...

File

Service Preferences	MODIFY PREFERENCES
Update GSX Location Defaults.....	MODIFY PREFERENCES
Change Next SRO Number	UTILITIES
Change User Access	All Users
Logout Of System.....	All Users
Load And Run Plug-In.....	RUN PLUG-INS

S.R.O.

Create New Service Repair Order.....	ADD SRO
List All SROs.....	SROs
View Last SRO	SROs
Find By SRO#.....	SROs
Search Editor.....	SROs
List By Modified Date.....	SROs
List Today's SROs	SROs
Find By Customer.....	SROs
Find By Serial#	SROs
Find By Service Tech.....	SROs
Find By Part Used#.....	SROs
List All Uncompleted SROs.....	SROs
List All Un-Billed SROs	SROs
List Disputed SROs	SROs
List Unreconciled SROs.....	SROs
List SROs In Need Of Posting	SROs
List SROs With Differences	SROs
List SROs With Parts To Return	SROs
Log Start Time	SROs
Log End Time.....	SROs

Reports

Stock Items Not Received	SROs
Exchange Items Not Received	SROs
List Exchange Parts To Return	SROs
Tech Hours Billed.....	SROs
Technician Commission Export.....	ACCOUNTING REPORTS

Locations Module:

**Requires "Locations Module" Group to access this Module...

File

Load And Run Plug-In..... RUN PLUG-INS

Locations

Add New Location Record LOCATIONS MODULES
List All Locations LOCATIONS MODULES

Data-Sync

Records Ready To Sync LOCATIONS MODULES
Run Scheduled Sync Now LOCATIONS MODULES
When Will Sync Run LOCATIONS MODULES
Clear All Sync Flags LOCATIONS MODULES
Show Data-Sync Monitor Window LOCATIONS MODULES

WEB Services Module:

**Requires "WEB Services Module" Group to access this Module...

File

WEB Services Preferences MODIFY PREFERENCES
Load And Run Plug-In..... RUN PLUG-IN

ShopSite

ShopSite Link Setup WEB SERVICES MODULE
Download Orders WEB SERVICES MODULE
Upload Modified Inventory WEB SERVICES MODULE
Visit ShopSite.com WEB SERVICES MODULE
Visit Lexiconn.com WEB SERVICES MODULE
Visit Our ShopSite Site WEB SERVICES MODULE
Visit Our ShopSite Backoffice WEB SERVICES MODULE

Subscription Module:

**Requires "Subscription Module" Group to access this Module...

File

Subscription Preferences MODIFY PREFERENCES
Load And Run Plug-In..... RUN PLUG-INS

Subscriptions

Process Subscription Run	PROCESS_NEW_SUBSCRIPTION_RUN
List All Subscribers	CUSTOMERS
Find Customers By Run Ref#.....	CUSTOMERS
Find Last Skipped Customers.....	CUSTOMERS
Find Customers By Process Date.....	CUSTOMERS
Find Customer By Sub-Type.....	CUSTOMERS
Find Expiring Subscriptions	CUSTOMERS
Find Current Active Subscribers	CUSTOMERS
Find Expired Subscriptions	CUSTOMERS
Export Subscriptions.....	SUBSCRIPTION MODULE

Recurring Bills

Generate Recurring Invoices	RUN_RECURRING_INVOICES
Find Customers By Billed Ref#.....	CUSTOMERS
Find Customers Not Billed Last	CUSTOMERS
Find Customers By Billing Date	CUSTOMERS
List All Billable Customers	CUSTOMERS
List All Due To Expire	CUSTOMERS
Item Due To Expire	CUSTOMERS
Search Editor	CUSTOMERS
Find Invoices By Billed Ref#.....	ORDERS
Find Invoices By Billing Date	ORDERS

Reports

Export All Subscription Data	SUBSCRIPTION MODULE
Subscription Expiration Graph	SUBSCRIPTION MODULE

The following section details Passwording related to all Entry Screens and Record Listings:

MENU/ITEM:	PASSWORD GROUP
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Inventory Entry Screen:

Functions

Run Plug-In On This Record.....	RUN PLUG-INS
Duplicate Record	All Inventory Users
Print Barcode	All Inventory Users

Records

View Another Inventory Record	INVENTORY
View Category Record	CATEGORIES
Create New Order.....	CREATE ORDER
List Associated Lot#s	LOTS
List Associated Serial#s.....	SERIAL NUMBERS

Custom

Custom User Fields	INVENTORY CUSTOM FIELDS
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WEB

Additional Data For WEB.....	ICM INVENTORY INFO
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Subscription

Link Subscribed Product.....	SUBSCRIPTION MODULE
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Inventory Listing Screen:

Functions

Assign Categories.....	ADD INVENTORY
Assign Sub-Categories	ADD INVENTORY
Assign Family	ADD INVENTORY
Assign Vendor.....	ADD INVENTORY
Assign Manufacturer.....	ADD INVENTORY
Modify Discount Structure.....	ADD INVENTORY
Selected Totals	All Inventory Users
Export On-Hands	IMPORT-EXPORT MODULE
Set Data-Sync Flag.....	LOCATIONS MODULE
Run Plug-In On This Listing.....	RUN PLUG-INS

WEB

Set "OK For WEB" FlagWEB SERVICES MODULE
 Set "Ready To Send" FlagWEB SERVICES MODULE
 Global Apply Product Pages.....WEB SERVICES MODULE
 Upload Selected Inventory.....WEB SERVICES MODULE

Category Entry Screen:

Records

View Another Category CATEGORIES

Category Listing Screen:

Functions

Set Data-Sync Flag.....LOCATIONS MODULE

Vendor Entry Screen:

Accounting

Manually Add A/P Ledger ListingACCOUNTS PAYABLE
 View Historical A/P.....ACCOUNTS PAYABLE

Notes

View Vendor NotesAll Vendor Users

Vendor Listing Screen:

Functions

Set Data-Sync Flag.....LOCATIONS MODULE

Customer Entry Screen:

Functions

Run Plug-In On This Record.....RUN PLUG-INS
 Register Loyalty Card GIFT CARDS
 Print Mailing LabelAll Customer Users

Records

View Another Customer RecordCUSTOMERS
 Create New Order..... CREATE ORDER

Custom

Custom User Fields CUSTOMER CUSTOM FIELDS

Accounting

Manually Add A/R Listing ACCOUNTS RECEIVABLE

Tax Overrides All Customer Users

View Historical A/R ACCOUNTS RECEIVABLE

Subscriptions

Go To Recurring Billing Page SUBSCRIPTIONS MODULE

Go To Subscriptions Page SUBSCRIPTIONS MODULE

Customer Listing Screen:

Functions

Run Plug-In On This Listing RUN PLUG-INS

Accumulate Selected Customers CUSTOMERS

Set Data-Sync Flag LOCATIONS MODULE

Export Subscription Data SUBSCRIPTIONS MODULE

Order Entry Screen:

Functions

Duplicate This Order All Order Users

Delete All Line-Items All Order Users

Set All Line-Items To Price All Order Users

Change User Access Level All Users

Discount All Items All Order Users

Reset All Prices To Default All Order Users

Bring Items Up-To-Date All Order Users

Lock All Order Prices All Order Users

Backorder All Line-Items All Order Users

Un-Backorder All Items All Order Users

Hold All Items On Order All Order Users

Un-Hold All Items On Order All Order Users

Negate All Quantities All Order Users

Total Of Order Quantities All Order Users

Logout Of System All Users

Look-up Item Price All Order Users

Check Giftcard Balance GIFT CARDS

View CC Information VIEW_CC_INFO

Show Available Credit All Order Users

What Products Contain "X"? All Order Users

List Components Of "X"	All Order Users
Assign Customer Code Only	All Order Users
Does Customer Already Exist?	All Order Users
Assign Order# Now.....	All Order Users
Order Screen Notes.....	All Order Users
Open Cash Drawer	All Order Users
Run Plug-In On This Order	RUN PLUG-INS

Records

View Another Order Record.....	All Order Users
View Another Inventory Record	INVENTORY
View Another Customer	CUSTOMERS
View Associated SRO.....	SROs
Add New Customer From Order	ADD CUSTOMER
Create Another Order	CREATE ORDER
Create New SRO	ADD SRO
Create New Inventory Record	ADD INVENTORY
Send Line-Items To Job Record	ADD JOB
Place Backorders On P.O.s	CREATE_NEW_PO
List Associated P.O.s	PURCHASING
Place Backorders On W.O.s.....	ASSEMBLY MODULE
List Associated W.O.s.....	ASSEMBLY MODULE

Load

From Portable Device	All Order Users
Customer Past Purchases	All Order Users
From Product Search.....	All Order Users
Load SRO	All Order Users

Print

Print Order	All Order Users
Print Picking List	All Order Users
Print Packing List.....	All Order Users
Shipping Label	All Order Users
Print\View Order History	All Order Users

Validate

Verify Before Shipping	VERIFY ORDER
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eBusiness

E-Mail Order	All Order Users
Save As HTML.....	All Order Users

Admin

Logout Of System	All Users
Lock\Unlock Order	TOTAL_ACCESS
Upper-Level Override	TOTAL_ACCESS
Unpost This Specific Invoice.....	UNPOST_INVOICES
Post This Specific Invoice.....	POST INVOICES

Order Listing Screen:

Functions

Duplicate Selected Order.....	CREATE ORDER
Set Data-Sync Flag.....	LOCATIONS MODULE
Create Selected P.O. Worksheet.....	PURCHASING
Assign Shipped Date	ORDERS
Export Selected As PIMS Records	IMPORT-EXPORT MODULE
Selected Order Stats	All Order Users
Run Plug-In On This Listing.....	RUN PLUG-INS

P.O. Entry Screen:

Functions

Visit Vendor's WEB Site.....	All P.O. Users
Load And Run Plug-In.....	RUN PLUG-INS

Records

Create New Inventory Record	ADD INVENTORY
View Another Inventory Record	INVENTORY
View Another Vendor Record.....	VENDORS
View This Vendor.....	VENDORS

Reconciliation

Zero-Out All QTY Invoiced.....	VENDOR RECONCILIATION
Reset All QTY Invoiced.....	VENDOR RECONCILIATION
Hide Completed Lines	VENDOR RECONCILIATION
Find A Specific Product.....	VENDOR RECONCILIATION

eBusiness

E-Mail Purchase Order	All P.O. Users
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P.O. Listing Screen:

Functions

Manually Close Selected P.O.s.....TOTAL_ACCESS
Run Plug-In On This Listing.....RUN PLUG-INS

Receiving Entry Screen:

Functions

Zero-out All Received QTYS All Receiving Users
Load And Run Plug-In.....RUN PLUG-INS

Records

View Another Inventory RecordINVENTORY

Receiving Listing Screen:

Functions

Export Selected Received Items.....IMPORT-EXPORT MODULE
Run Plug-In On This Listing.....RUN PLUG-INS

The following section details Passwording related to special functions and controls throughout the program, that are not Menu driven.

ASSIGN_TERMS:

If a User does not belong to this Group, then no Accounts Receivable Payment Types will be displayed in any Payment Type chooser dialogbox.

If a User belongs to this Group, then they can assign terms on a Recurring Billing process.

If a User belongs to this Group, then they can assign terms on a Customer record.

VIEW_CC_INFO:

If a User does not belong to this Group, then all three tracks on the Creditcard Prompt Dialogbox will be “bulleted” along with the CVC field.

MODIFY_POSTED_INVOICE:

If a User belongs to this Group, then they can modify the Creditcard Number on a Posted Invoice. Other specific fields will also become editable as well.

OVERRIDE CREDIT LIMIT:

If a User belongs to this Group, then they can approve an “Over Limit” dialogbox prompt on an Order entry screen.

If a User belongs to this Group, then a Bypass Credit Limit button will be displayed on the Order entry screen.

RECORD DELETION:

If a User belongs to this Group, then they can delete most records from a record listing. Certain limitations apply on certain listings (Posted, etc.).

EXPORT INFORMATION:

If a User belongs to this Group, then they can use most of the “Report Selected” buttons on record listings.

READ-ONLY INVENTORY:

If a User belongs to this Group, then they can only view an Inventory record (if they have access) and not modify it.

ACCOUNTS RECEIVABLE:

If a User belongs to this Group, then they can view the A/R Ledger on a Customer record.

VIEW_LOCKED_CUSTOMER:

If a User belongs to this Group, then they can view a User-locked Customer record. They can also lock a Customer record.

ASSIGN_CUSTOMER_DEPT:

If a User belongs to this Group, then they can assign a Department to a Customer record.

ACCOUNTING MODULE:

If a User belongs to this Group, then they can view the Sales Ledger on an Order entry screen.

CANT_CHANGE_TO_INVOICE:

If a User belongs to this Group, then they can not change an Order into an Invoice. If "Invoice" is the default Order type set in your system, then anyone belonging to this group will get a Salesorder as the default Order type instead.

ACCOUNTS PAYABLE:

If a User belongs to this Group, then they can view the Accounts Payable Ledger on the Vendor entry screen.

VENDOR RECONCILIATION:

If a User belongs to this Group, then they can go to the Vendor Reconciliation section of a Purchase Order entry screen.

TOTAL_ACCESS:

If a User belongs to this Group, then the "Billed" checkbox is enterable on an SRO entry screen.

CAN'T CHANGE PRICE:

If a User belongs to this Group, then the PRICE, NON-TAXABLE, and DISCOUNT fields on an Order line-item will be locked and non-modifiable.

LOCK ORDER PRICE FIELD:

If a User belongs to this Group, then the PRICE field on an Order line-item will be locked and non-modifiable.

WRITE CHECKS:

If a User does not belong to this Group, then they can not view an existing Check entry screen.

READ-ONLY CUSTOMER:

If a User belongs to this Group, then they can only view a Customer record (if they have access) and not modify it.

ADD_RECORD:

If a User does not belong to this Group, then they can not add a new record to the system. This is usually regardless of other "Add" Groups (ie: ADD INVENTORY).

READ-ONLY ORDER:

If a User belongs to this Group, then they can only view an Order record (if they have access) and not modify it.

ARROW_KEY_NAVIGATION:

If a User belongs to this Group, then using the “Arrow” keys (Left/Right) will usually move from one page to another on most record entry screens. If not, then Arrow keys will move as normal in text edit fields.

VIEW_CC_INFO:

If a User belongs to this Group, then when they select a Creditcard Payment Type on a Salesorder they are presented with the Creditcard entry area of the Order entry screen.

READ-ONLY VENDOR:

If a User belongs to this Group, then they can only view an Vendor record (if they have access) and not modify it.

HIDE_ORDER_COSTS:

If a User belongs to this Group, then any Cost, Profit, and Margin related information is not displayed on Order screens or Product choosers and the like.