

User Permission Guidelines

Determine access rights within Exertis Store website.

Standard Permissions
Create and save Baskets
Favourite products
Account Contacts – view Exertis contact details
Favourites - create and manage favourite product lists
Saved Baskets – view, reactivate, delete and name
Digital Locker – access to view software license keys
Quote History – view quotes
Order History – reduce or delete the open order quantity on a backorder. View shipping status, carrier tracking information and PODs, and download Serial Number list and Invoices
Orders Requiring Action – approve special delivery and pay for orders by credit card
Rejected Orders – view web orders rejected by a Supervisor
User Settings – update personal details, email and password. View your User Permissions
Address book – view dropship delivery addresses
Payment Details – add new payment cards and manage default payment card settings

Administrator Permission
Add new users
Approve new users' registration requests
Assign user permissions
Set user order threshold limits and assign a supervisor
Activate/deactivate users

Supervisor Permission
Supervisor Approval – approve order threshold limits

Place Orders Permission
Place Orders
Convert Quote to Order
Call off Bill and Hold items

Edit Orders Permission
Reduce or cancel order lines on backorder

Dropship Permission

Create dropship delivery Addresses

Place dropship delivery Orders

Returns Permission

View Returns status and history

Accounts Permission

View current Account Balance

View Invoice/Credit Memo details and status

Make full and partial Invoice payments/allocate Credit Memos (by credit card)

Raise Invoice queries and view status

Request full and partial Returns

Download PDF Statement, Invoices and Credit Memos