

exertis

User Permission Guidelines

Determine access rights within Exertis Store website



a **DCC** business

User Permission Guidelines

Standard Permissions

Access Area	Permitted Actions
Saved Basket	Create, save, edit, and delete your own baskets. Merge baskets.
Favourites	Create, save, edit, and delete favourite product lists.
Quickshop	Create baskets quickly and easily by entering the MPN, EAN or SKU
Account and Contact Details	View your account details and related Exertis contact details.
Order History & Track My Orders	View shipping status, carrier tracking information and PODs, and view and download serial numbers.
User Settings	View and edit your personal details, view your access permissions, and reset your password.

The following additional permissions can be assigned separately from the standard permissions listed above. These permissions are independent of one another (e.g., assigning dropship permissions does not automatically grant place order permissions).



Account Management Permissions

Administrator Permissions

Access Area	Permitted Actions
Manage Users	Add new users, edit user details and permissions, reset user passwords, deactivate users, and (for credit limit accounts) set user order threshold limits and assign a supervisor.
Registration Requests	View and approve or reject user registration requests.

Supervisor Permissions

Access Area	Permitted Actions
Supervisor Approval	Credit limit accounts - Approve or reject orders that exceed order threshold limits made by supervisees.



Purchase Permissions

Place Order Permissions

Access Area	Permitted Actions
Checkout	Place your order.
Quote History	View a list of expired quotes, and convert available quotes to orders.
Digital Locker	View and use software licence keys.
Orders Requiring Action	Cash with order accounts – Pay for orders raised by your account manager.
Bill and Hold	Call off Bill & Hold products.
Rejected Orders	View orders rejected by supervisors.
Payment Details	Create, save, edit, and delete payment card details

Edit Order Permissions

Access Area	Permitted Actions
Order History & Track my Orders	In addition to standard permissions, reduce or cancel order lines on backorder.

Dropship Permissions

Access Area	Permitted Actions
Checkout	Change the delivery address in checkout.
Address Book	Create, save, edit, and delete delivery addresses.

Bulk Upload Permissions*

Access Area	Permitted Actions
Quickshop	Upload a csv file to create multiple orders to different delivery addresses in one go.

*This must first be enabled on your account, please contact your account manager for activation.

Post-Purchase Permissions

Accounts Permissions

Access Area	Permitted Actions
Invoice History	View invoice and credit memo status and details, download invoices and credit memos, and raise and view invoice queries.
Statements	Download the last statement run on your account.
Open Transactions	View current account balance, make full and partial invoice payments, allocate credit memos, and raise and view invoice queries.

Returns Permissions

Access Area	Permitted Actions
Order History & Track My Orders	In addition to standard permissions, raise full and partial return requests.
Returns History	View returns status and history.

