

Permission to edit prices on billing documents have been changed.

[This change is in affect from v1.21.00]

Billing documents includes the following kind of documents: quotes, job cards and invoices.

Line item amount and discount is locked down with permissions so that only the following people are able to edit line amounts and discount on Quotes, Job Cards and Invoices:

Permission on Quotes:

The permission to edit prices on quotes have been changed from 'sales' permission.

Users with the 'sales' permission on will still be able to create and edit quotes, but will not be able to edit the prices.

Quotes - Permission restriction on line item amount and discount editing

You need one of the following permissions:

- Sales Managers : sales supervisor write permission
- General Managers : general manager write new permission
- Nominated Persons (different for each document type) :
accounting quotes write new permission - > quotes

Edit User #191 ✕

[Account Details](#) **Permissions** [Notifications](#) [API](#) [Audit Trail](#)

Sales	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON
Sales Lead Assigner	<input type="checkbox"/> OFF	<input checked="" type="checkbox"/> ON
Sales Supervisor	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON
General Manager	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON
Marketing	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Billing	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON
Asset Register	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON
Devices	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON
Mikrotik Login Passwords	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Network Device Passwords	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF

Edit User #191

Account Details | **Permissions** | Notifications | API | Audit Trail

Hosting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hotspot Usage Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Basic Accounting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounting Adjustments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounting API Settings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Invoice Editing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Quote Editing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Job Card Editing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fleet Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company Documents	<input checked="" type="checkbox"/>	<input type="checkbox"/> OFF

Permission on Job Cards:

Job Cards - Permission restriction on line item amount editing

You need one of the following permissions:

- Sales Managers : sales supervisor write permission
- General Managers : general manager write new permission
- Nominated Persons (different for each document type) :
accounting jobcard write new permission - > jobcards

Edit User #191

Account Details | **Permissions** | Notifications | API | Audit Trail

Sales	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON
Sales Lead Assigner	<input type="checkbox"/> OFF	<input checked="" type="checkbox"/> ON
Sales Supervisor	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON
General Manager	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON
Marketing	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Billing	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON
Asset Register	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON
Devices	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON
Mikrotik Login Passwords	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Network Device Passwords	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF

Close Delete Save changes

Edit User #191

Account Details | **Permissions** | Notifications | API | Audit Trail

Hosting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hotspot Usage Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Basic Accounting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounting Adjustments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Accounting API Settings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Invoice Editing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Quote Editing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Job Card Editing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fleet Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company Documents	<input checked="" type="checkbox"/>	<input type="checkbox"/> OFF

Permission on Invoices:

Invoices - Permission restriction on line item discount editing

You need one of the following permissions:

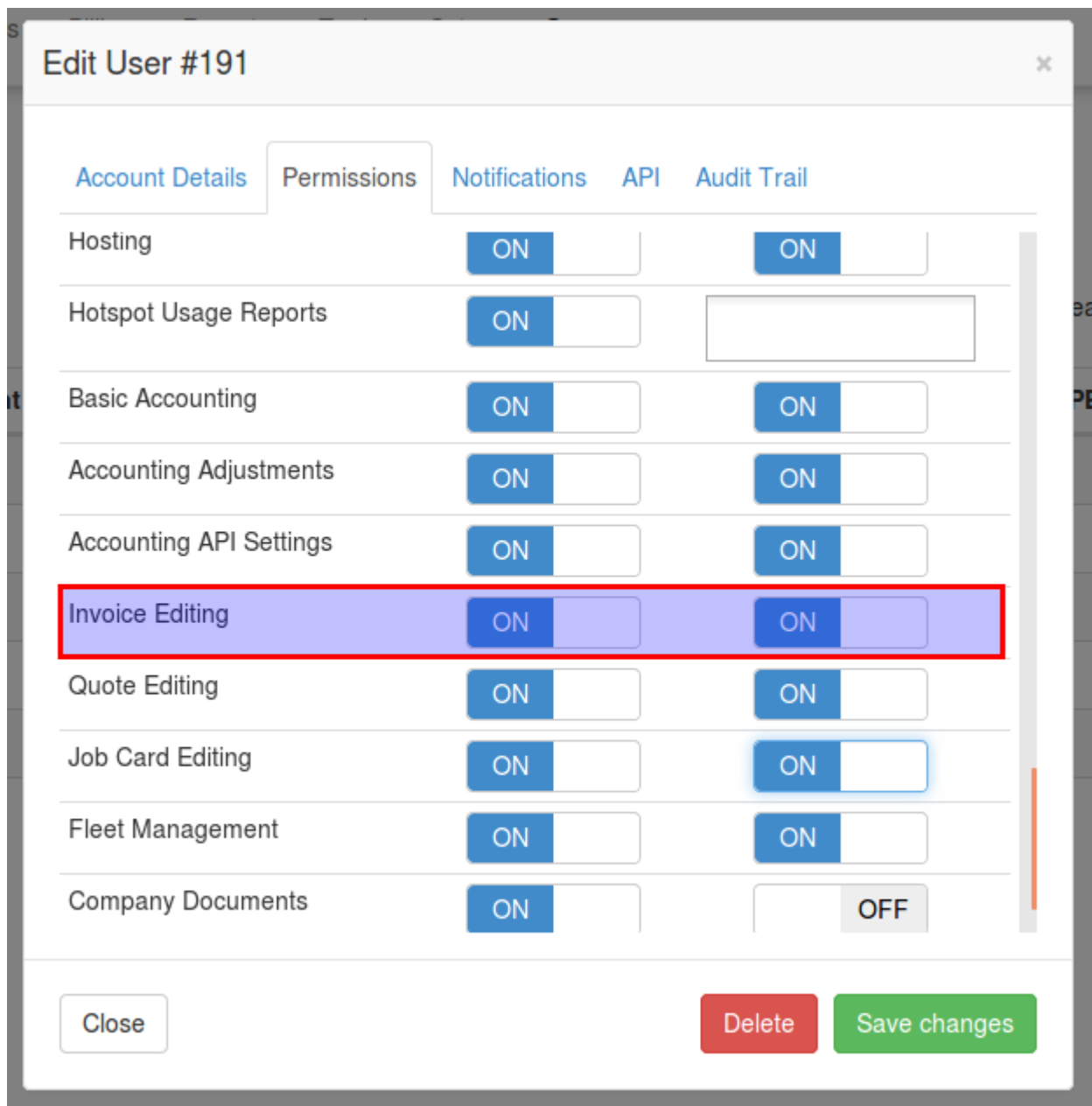
- General Managers : general manager write new permission
- Nominated Persons (different for each document type) :
accounting invoice write permission - > invoices

Edit User #191

Account Details | **Permissions** | Notifications | API | Audit Trail

Accounting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
A2Billing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Lead Assigner	<input type="checkbox"/> OFF	<input checked="" type="checkbox"/>
Sales Supervisor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
General Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Marketing	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Billing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Asset Register	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Devices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Close Delete Save changes



The screenshot shows the 'Edit User #191' interface with the 'Permissions' tab selected. The 'Invoice Editing' permission is highlighted with a red box and is currently set to 'ON'. Other permissions are also shown with their current status.

Permission	ON	OFF
Hosting	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hotspot Usage Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Basic Accounting	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Accounting Adjustments	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Accounting API Settings	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Invoice Editing	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Quote Editing	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Job Card Editing	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Fleet Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company Documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Buttons: Close, Delete, Save changes

Permission on billing document templates:

Go to -> `yourdomain/sales/document_templates`

Error if you have insufficient permissions:

“Unable to edit this item, insufficient rights.

Only persons with any of the following permissions will be able to edit:

- General Manager
- Sales Supervisor
- Quote Editing”