

CLERK SECURITY GROUP PERMISSIONS

ACCOUNTS

PERMISSIONS WITH OPTION SELECTED



OPTIONS

ACCOUNTS

Account Records

Delete Account

Edit Accounts

Allows access to the Accounts menu. Used to manage Customer data and run processes based off the Customers captured. The terms "Customer", "Member" and "Account" are interchangeably used. It shows columns which are more focused on Companies or patrons that have Cash Accounts held in SwiftPOS.

Allows access to search through Member/Account records which have been added to SwiftPOS and are assigned to their Venue. **NOTE** : This only applies in those Location Groups for which authorisation has been granted.

Allows access to delete a Member/Account from SwiftPOS.

Allows access to view/edit all attributes of a Member/Account Record in Full Edit mode.

Edit Credit Limit Allows users to edit the Credit Limit set on individual Member/Account Records.

Reset Individual Balance Allows users to reset the Account Balance of individual Member/Account Records back to 0.00.

Account Statements

Process Payments

Account Classifications

Reset Account Balances

Allows access to run a Statement process based on the Cash Accounts that have been used by Members/Accounts within SwiftPOS.

Allows access to reconcile payments of Invoices raised/charged to Member/Account Cash Accounts.

Allows Member/Account Classifications settings to be altered which impact Cash Accounts within SwiftPOS.

Allows access to reset the Account Balances of all Member/Account Records that are assigned to a Classification.